



Customer Relationship
Management

CRM Web Business Logic OTC

Version 14.1

Notices

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Preface

For details, see the following topics:

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

About this documentation

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

Notation conventions

This document uses the following notation conventions:

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

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

Aurea global support

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

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

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

1

General Functions

Learn about the General functions for Aurea CRM.Web Business Logic.

Below topics explain the 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: 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>.

Typographical Conventions

The following formatting is used in this manual:

- Gray and bold: Menu commands, menu names, titles of dialog boxes, check boxes, radio buttons, info area names, names of fields and buttons are written **like this**.
- Menu commands: "Select **New > New Person** from the context menu" means that you should first select **New** and then **New Person** from the record's context menu.
- Bold: Particularly important information is written in **bold**.
- Keyboard shortcuts: Simultaneous key strikes are identified by placing a plus sign between the key designations, e.g. Alt+D.
- Notes and tips:

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

- Related information: Links to related information in other chapters or documents are indicated using the >> symbol.

Login

Learn how to login to Aurea CRM and perform various login related settings according to your profile.

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.

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: 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.

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

To start Aurea CRM web:

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

The **Login** page is displayed.

Note: Please ask your administrator for the correct address.

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.

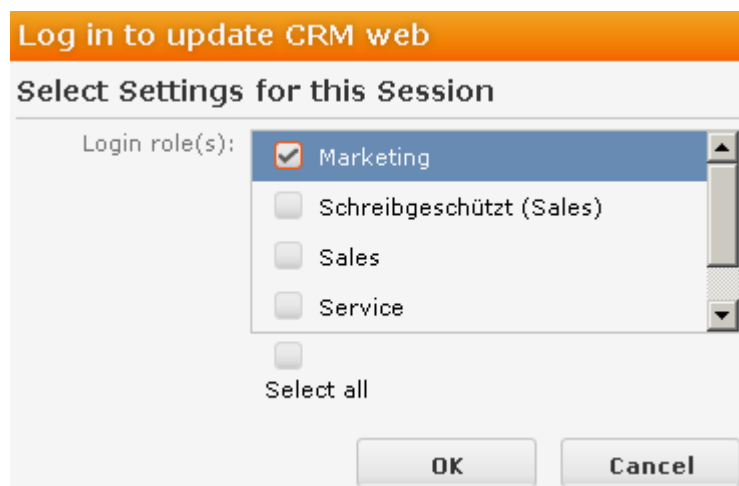
4. Click on **Log In**. Your personal start page is displayed.

Selecting Roles

Your administrator can define roles and assign specific access rights to them. 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.
1. Enable **Select roles** and click on **Log In**. The dialog used to select your roles is displayed.



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

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

Switching between Telephone Profiles

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

The name of the telephone profile in use is displayed in the system information.

To change your telephone profile:

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

Further options are displayed.

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


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

1. Select the desired profile from the **Telephone Profile** drop-down list. By default, **Do not show phone toolbar** is selected.
2. Click on **OK**.
3. 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.

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: 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, >> on page 37.

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

To start Aurea CRM web:

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

The **Login** page is displayed.

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

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

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

4. Click on **Log In**.

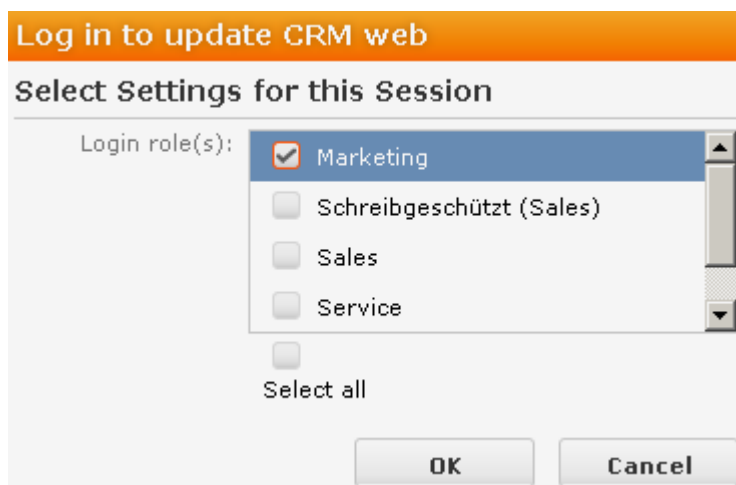
Your personal start page is displayed.

Selecting Roles

Your administrator can define roles and assign specific access rights to them, >> on page 4. 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.
1. Enable **Select roles** and click on **Log In**. The dialog used to select your roles is displayed.



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

Note: 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, >> on page 37.

To change your telephone profile:

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

Further options are displayed.

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


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

1. Select the desired profile from the **Telephone Profile** drop-down list. By default, **Do not show phone toolbar** is selected.
2. Click on **OK**.
3. 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), >> on page 2.

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

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

Note: 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.

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)

Company Krist Intl. OY

Company Krist Intl. OY
 Street Mannerheimintie 145
 City Helsinki
 Postal Code 00010
 Country Finland

Address | Type | Classification | Event

Country Code
 Fax
 Rep 1 ID Miranda Meyer
 Label Andis Label

Area Code
 E-mail 1
 Rep 2 ID Miranda Meyer

Related Data

Persons | Activities | Opportunities | Offers | Orders | Installed Bases | Services

« < 1 - 6 of 6 > »

Last Name	Fir...	Fu...	Depart...	Ar...	Company	E-mai...
Saarinen	Aino				Krist Intl. OY	
Aaron	Jonne		Bärtige Fraue	1212	Krist Intl. OY	jonne.aar...
Omena	Jorma		Research		Krist Intl. OY	
Lehtolainen	Leena		Research		Krist Intl. OY	leena@kir...
Riistiholinen	Leena				Krist Intl. OY	
Jahonnen	Max		Internal Rev...		Krist Intl. OY	Max@krist...

Start Page

Your start page is displayed once you have logged on.

Update

Welcome to update.CRM, Adam Aussendienst (9100)

Calendar
▼ x

◀ ▶ February 2014

New Calendar Entry

CW	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
5	27	28	29	30	31	1 👤 10:...	2
6	3 👤 12:...	4 👤 11:...	5 👤 8:4... + 1 more	6 👤 8:3... + 3 more	7 👤 8:3...	8	9 👤 9:3...
7	10 👤 11:...	11 👤 11:...	12	13	14	15 👤 9:0...	16
8	17	18	19	20	21	22	23
9	24	25	26	27	28	1	2
10	3	4	5	6	7	8	9

Information
▼ x

New and Open Tasks
▼ x

🗨 You have 0 new tasks

Other Appointments
▼ x

🗨 You have 0 other appointments in the next month

Undo
◀ 1 - 5

KPI Ov

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

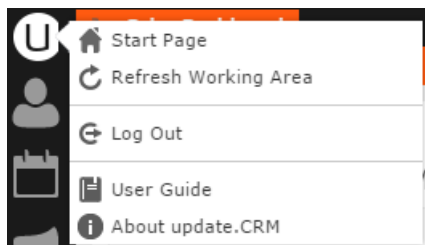
You can customize the layout of your start page. Drag an area to the desired position and release the mouse button. Click on ✕ to close an area. You can determine which areas are displayed and how many columns each area spans, >> on page 22.

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:

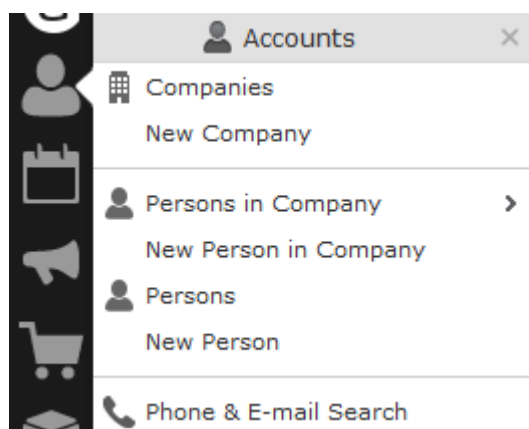


- **Start Page:** Switches to Aurea CRM web's start page.
- **Refresh Working Area:** Refreshes the current screen.
- **Log Out:** Closes Aurea CRM web. For security reasons, always exit Aurea CRM web using this option.
- **User Guide:** Opens the user manual.
- **About update.CRM:** Displays information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

Navigation

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

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



History

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

Note: 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, >> on page 34. If you simply close your browser, the history is **not** saved.

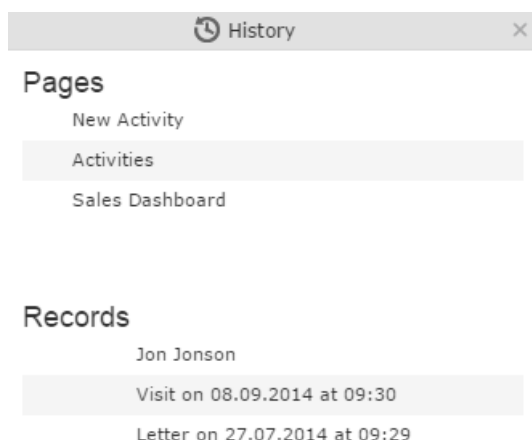
Your administrator defines which entries are displayed in the history:

- 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, >> on page 34.

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: Note: Depending on your configuration, you can also access the records you have opened recently from the corresponding menu, >> on page 59.

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, >> on page 9.

Displaying your Favorites

To view your favorites list:

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

Your favorites are displayed.

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



2. You can access the context menu (☰) and quick view (📄) for all entries in the list. Double-click on a record to open it in the default view.
3. If you have added records to your list of favorites, you can also access these records from the corresponding menu entry (e.g. you can access your favorite companies from the **Companies** menu):



Adding Records to your Favorites

To add a record to your favorites:

1. Switch to the desired record, >> on page 39.
2. Select **Add to Favorites** from the record's context menu.

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

Removing Records from your Favorites

To remove a record from your favorites:

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

The selected record is removed from your favorites.



Quick Links

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

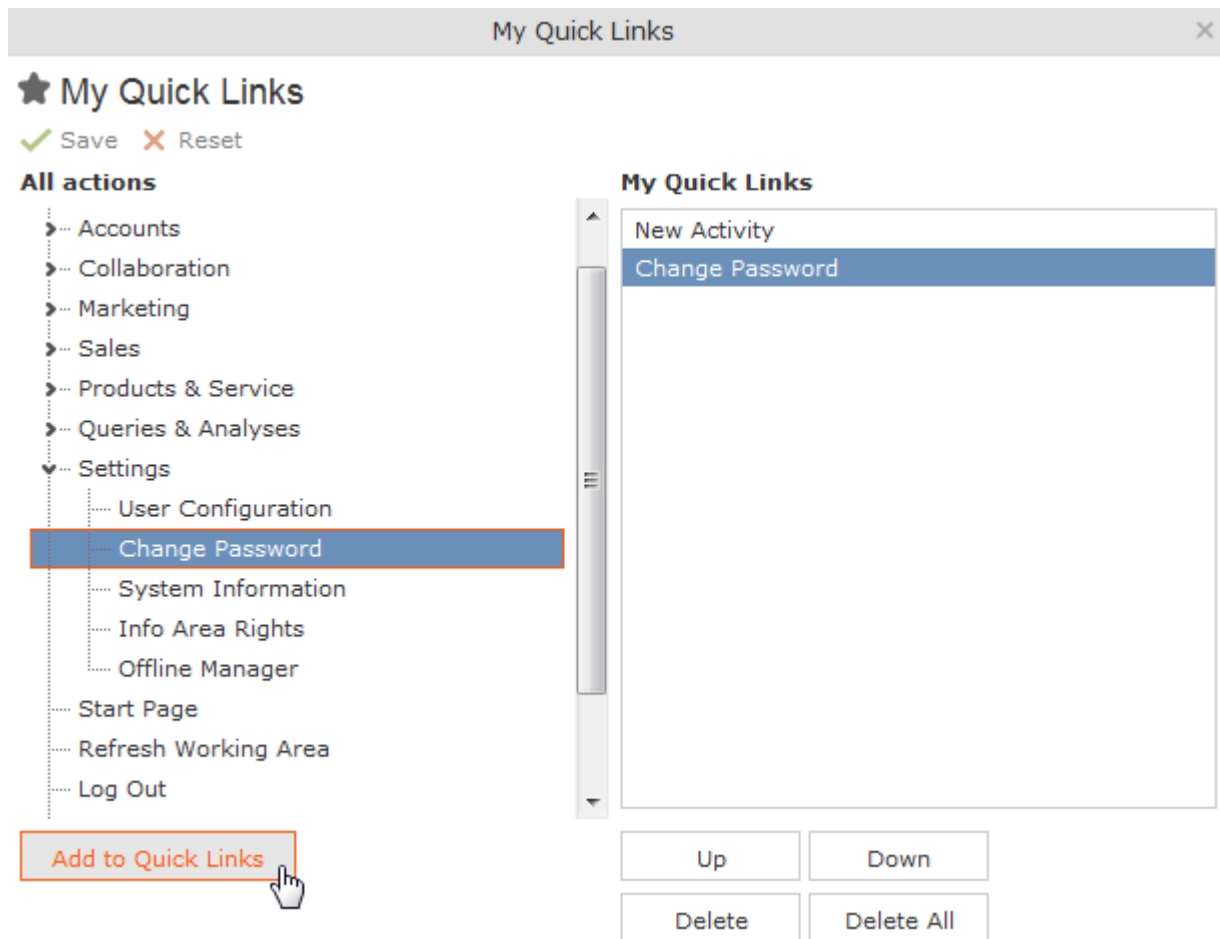
Customizing Quick Links

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

To add quick links:

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

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



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

Inbox

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

To display your inbox:

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

Your inbox is opened.

Inbox						
My Tasks My Messages My Open To-Dos My Reminders System						
<< < 1 - 7 of 7 > >> New 						
	Rep ID	Status	Priority	Due on	Due at	Subject
	Miranda Meyer	Open	High	21.12.2009	16:00	Business Dinner Meeting
	Miranda Meyer	Open	High	28.09.2010	00:00	Event vorbereiten
	Miranda Meyer	Open	High	19.10.2010	00:00	Kundenevent planen
	Miranda Meyer	Open	High			Schaffe, schaffe, Hüsle baue
	Miranda Meyer	Open	High			
	Miranda Meyer	Open	High	12.08.2011	15:36	
	Miranda Meyer	Open	High	13.09.2012	15:15	Protokoll schreiben

The following tabs are displayed:


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



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

- **My Open To-Dos:** Your open To-Dos are listed here.
To-Dos can be displayed for due activities, tasks, absences and marketing activities.
- **My Reminders:** Your reminders are displayed here.

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

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

exclamation mark ()

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

Working Area

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

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

- Using the search, where you can use search criteria to define which records are displayed.
- Using your favorites, >> on page 8.
- From a query's results list, >> on page 77.
- From your history of recently accessed records or search results, >> on page 7.

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:




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 (>> on page 34):

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

Example: « < 1 - 20 of 50+ > »

20 records are displayed per page.

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

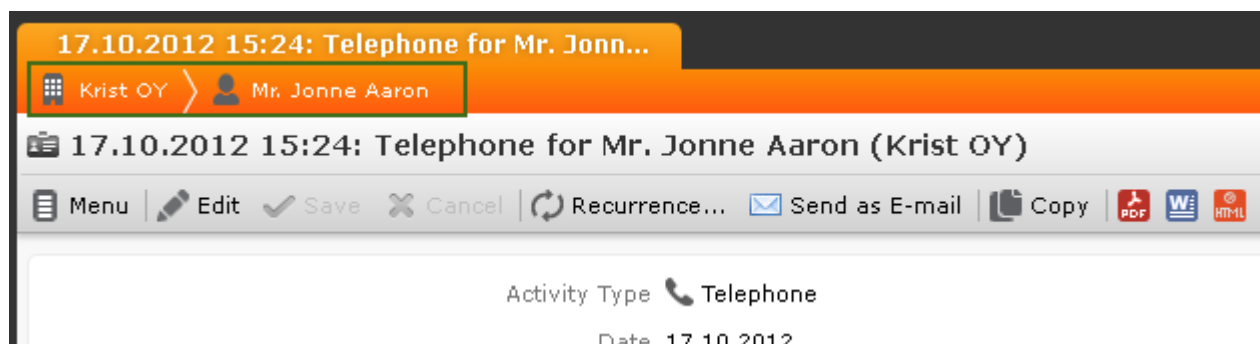
Example: « < 1 - 20 of 50+ > »

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

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

Breadcrumbs

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



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

Search Area

The search area allows you to search for records using search criteria, >> on page 39.

Ghost Text

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

Example:

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, >> on page 13. In addition, child records are displayed under **Related Data**, >> on page 20.
- 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, >> on page 14.

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

Changing the Order of Tabs

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

Example:

Ms. Leena Lehtolainen

Overview

Name	Ms. PhD Leena Lehtolainen	ABC	Source	Personal Contact
Department	Marketing	Rep	Date of ...	
Function		Position		
Job Title				

Comment

Contact | Photo | Speaker

Telephone	E-mail	Exclude ...	<input type="checkbox"/>
Mobile T...	Last Acti...	Exclusio...	
Home of...	Preferre...	Label	
Fax	Language		

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



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

Ms. Leena Lehtolainen

Add Visit
 Relationship Chart

Overview

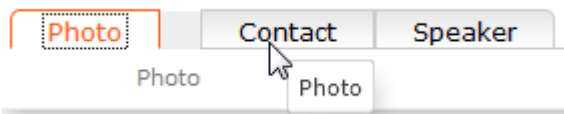
Name	Ms. PhD Leena Lehtolainen	ABC	Source	Personal Contact
Departm...	Marketing	Rep	Date of ...	
Function		Position		
Job Title				

Comment

Contact

Telephone	E-mail	Exclude ...	<input type="checkbox"/>
Mobile T...	Last Acti...	Exclusio...	
Home of...	Preferre...	Label	
Fax	Language		

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



Note: 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.

Example: Tree view for a company:

Note: 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:

Krist Intl. OY

Krist Intl. OY

Tab View
Tree View
Analysis: Buying Frequ...
Analysis: Contact Frequ...

Remove from Favorites
Copy Link to Clipboard
Merge with...
Make Call

New >
Go to All Related >



Compa... Krist Intl. OY
Street Mannerheimintie 145 Postal ... 00120
City Helsinki Country Finland

Address	Type	Classification	Event
Cou...	Are...	Tele...	003891234...
Fax	E-m...	E-m...	
Rep... <u>Miranda Meyer</u>	Rep... <u>Miranda Meyer</u>	Web...	
Label Andis Label			

Persons
Activities
Opportunities
Offers
Orders
Installed Bases
Service Contracts
Tickets

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

- 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


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

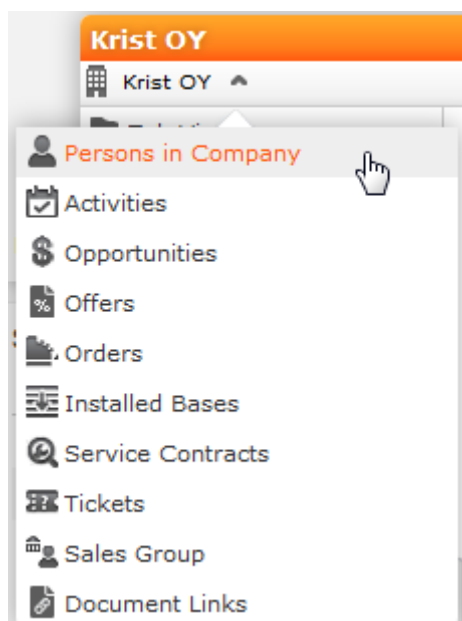
Breadcrumb Trail in the Quick View

The breadcrumb trail is also available in the quick view:

Mr. Jonne Aaron

Krist OY > Persons in Company > Mr. Jonne Aaron >

- 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

 A screenshot of a user interface showing a table of 'Persons in Company' records. The table has columns for 'Last Name', 'First N...', 'Function', 'Departm...', and 'Area Code'. The records are: Aaron Jonne (CEO, Management) and Krist Leena. The table is displayed in a quick view format with a 'Display All Records' button on the left.

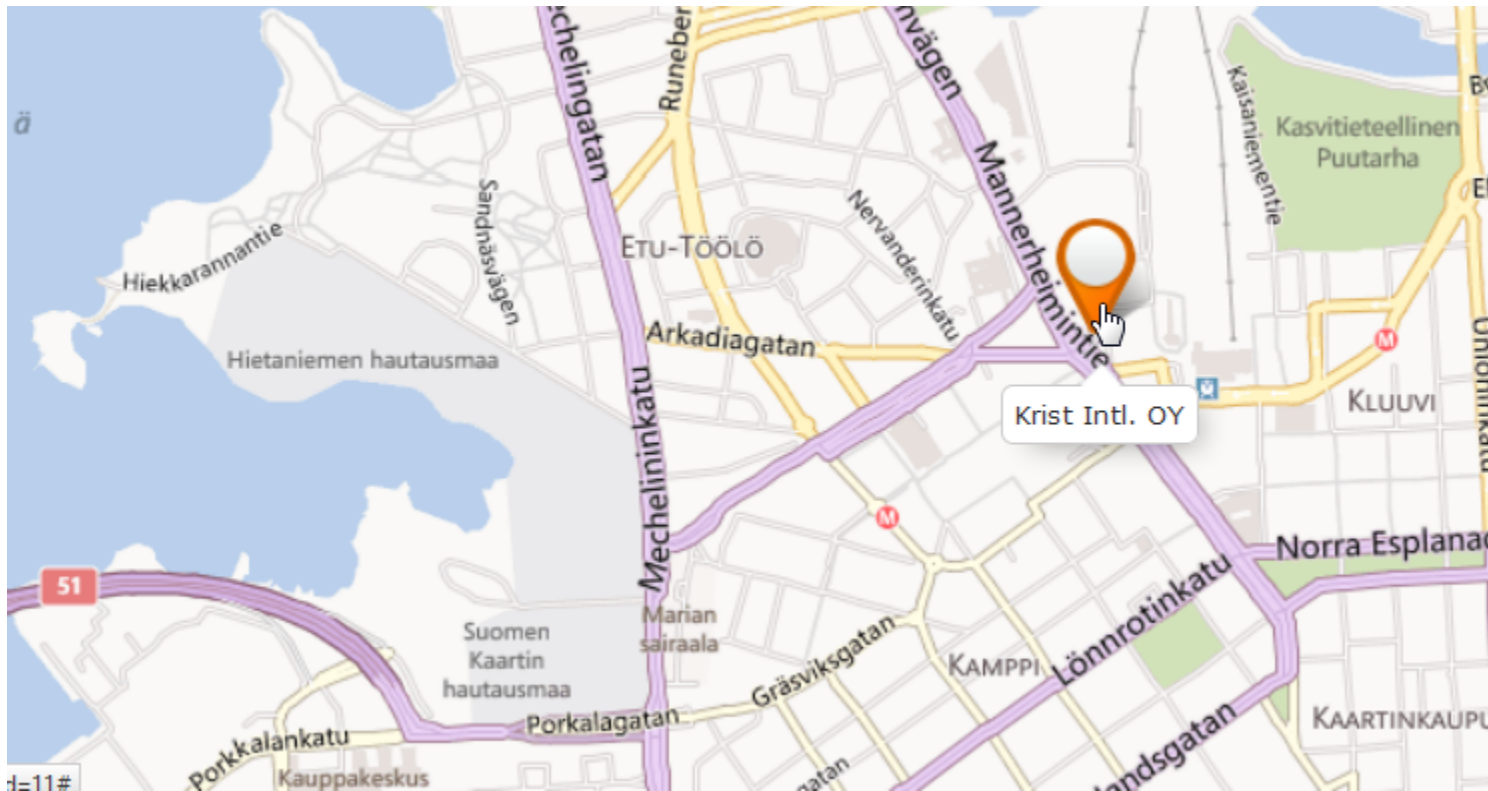
Last Name	First N...	Function	Departm...	Area Code
Aaron	Jonne	CEO	Management	
Krist	Leena			

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

Map View

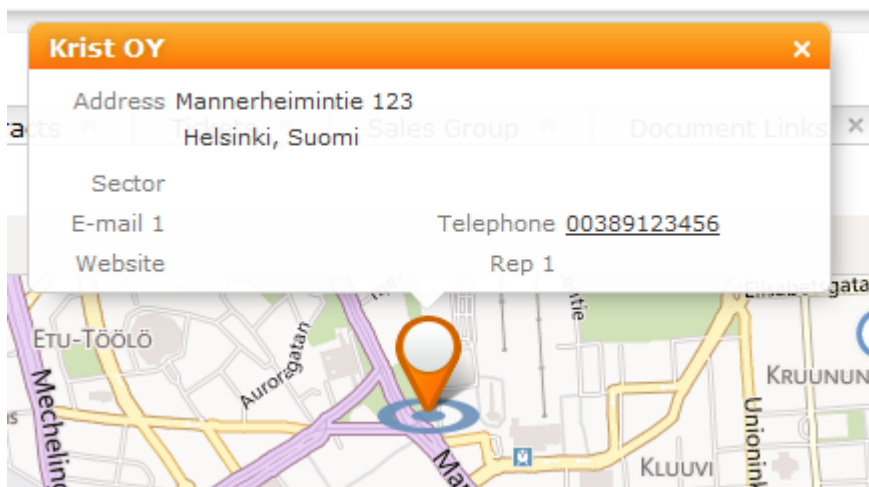
Your administrator can define that locations are displayed on a map, e.g. companies or the address of a property.

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

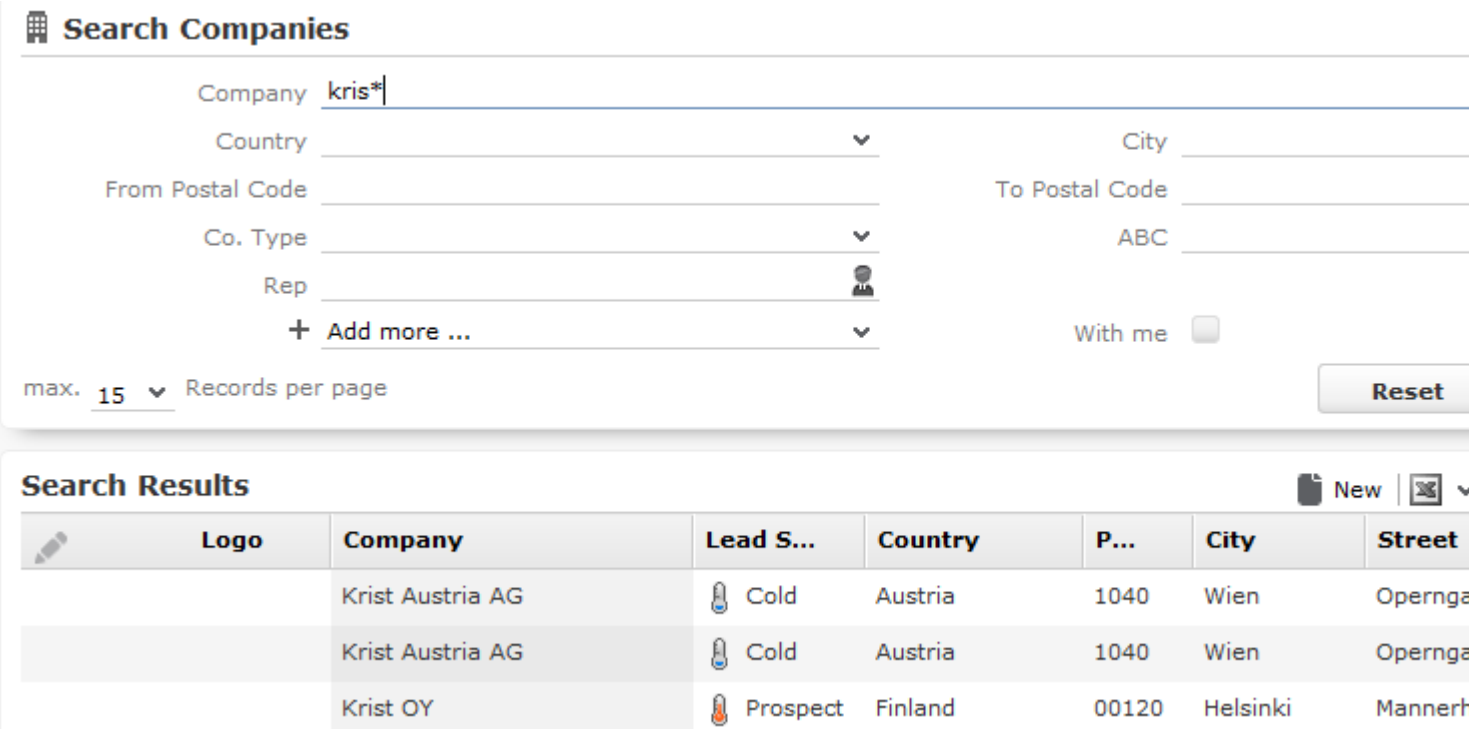
You can edit records directly in the results list, export the data, or display a record's important details in the MiniDetails.

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

-  (**Quick View**): Displays the quick view, >> on page 15.
-  (**Show Menu**): Displays the record's context menu, >> on page 24.
-  (**Display Details**): Displays the record's details, >> on page 19.

Result Lists

The following screenshot shows the results of a search:



Search Companies

Company

Country City

From Postal Code To Postal Code

Co. Type ABC





Rep

+ Add more ...

With me

max. 15 Records per page



Search Results

	Logo	Company	Lead S...	Country	P...	City	Street
		Krist Austria AG	 Cold	Austria	1040	Wien	Operngas
		Krist Austria AG	 Cold	Austria	1040	Wien	Operngas
		Krist OY	 Prospect	Finland	00120	Helsinki	Mannerhe

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**, >> on page 60.

Switch between pages of results using the arrows above and below the results list ( < 16 - 30 of 45+ > ) , >> on page 11.


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, >> on page 20.

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

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

Displaying Details

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

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

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

Color Codes and Icons in Lists

Your administrator can determine that entries in the list are displayed in different colors or with specific icons 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, >> on page 22.

You can edit related data by opening the record in tab view or directly in a list, >> on page 60.

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: Note: Your administrator can define alternative keyboard shortcuts.

Filter Masks

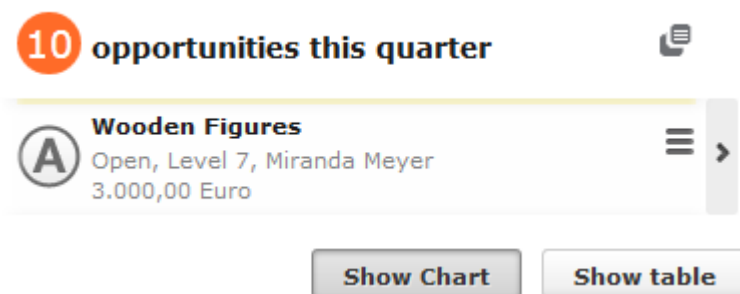
Filter masks are dynamic masks that can differ depending on the data in a record.

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: Note: Your administrator is responsible for defining filter masks.

Live Tiles


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



The live tile consists of two elements:

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

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

- Click 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: 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.

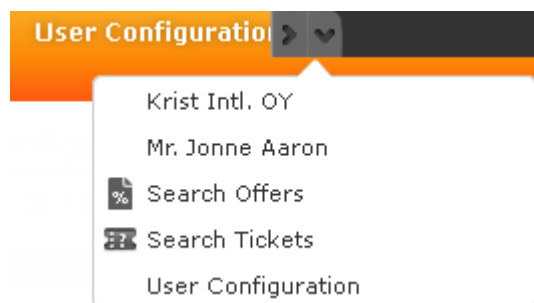
To open a record or page in a new tab:

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.

1. 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.

2. Click on  (**Close**) to close the current tab.

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

Example:

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

Refreshing the Work Area

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



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

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

You can configure the layout of areas on the screen.

To change the layout:

1. Click on ▼ 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:

Related Data

Persons in Company							
New ↪ Display All Records							
	Last N...	Fir	Fu	D...	Ar...	Company	E-...
	Aaron	Jonne	CEO	Mana...		12 Krist OY	jonne...
	Krist	Leena				Krist OY	leena...

Activities		
<< < 1 - 15 of 34 > >>		
	Ty	St...
	Tele...	07.02
	Tele...	09.09
	Tele...	17.10
	Tele...	03.01
	Tele...	07.02
	Tele...	04.02
	Tele...	01.02
	Tele...	11.02
	Tele...	06.08
	Tele...	13.08
	E-m...	30.07
	Tele...	05.
	Tele...	12.
	Tele...	19.
	Tele...	26.

Opportunities							
New ↪ Display All Records							
	Opportunity	Le'	Co	To'	Cu	Res...	Rep ...
	Hirvi	Lev...		100		Miranda ...	Miranda...

Offers	
	P... Da
	21300... 30.0.
	45 11.0.
	47 08.0.
	21300... 14.0.

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

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

To change the order of areas:

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

Links

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

By default, links are displayed underlined.

Rep [Adam Aussendienst](#)

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

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

tel:

protocol.

Assigning Icons to Links

Your administrator can determine that an icon is displayed instead of specific URLs. 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:



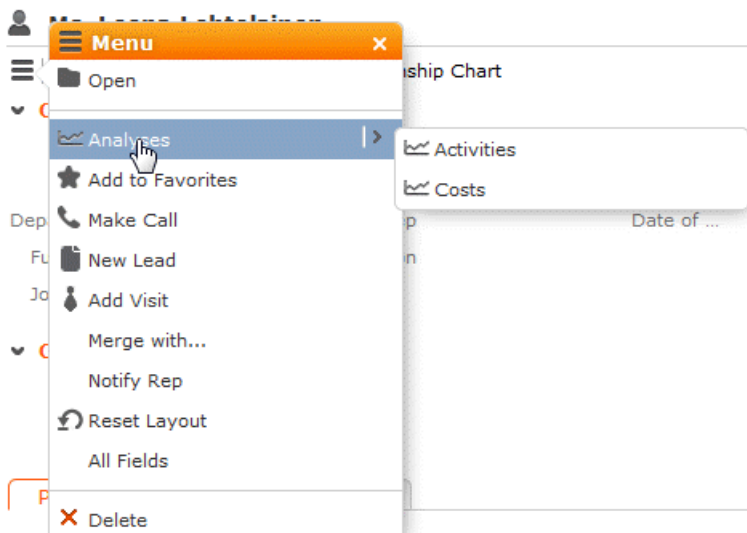
Context Menu

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, >> on page 21.

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.

		Oct 2012							
	W	Mo	Tu	We	Th	Fr	Sa	Su	
40		1	2	3	4	5	6	7	
41		8	9	10	11	12	13	14	
42		15	16	17	18	19	20	21	
43		22	23	24	25	26	27	28	
44		29	30	31	1	2	3	4	
45		5	6	7	8	9	10	11	

Today: Th 18 Oct, 2012

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, >> on page 36.

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, >> on page 29.

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

To select an option from a drop-down list:

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



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

Adding Catalog Values

To add catalog values:

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

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

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

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

Note: 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.

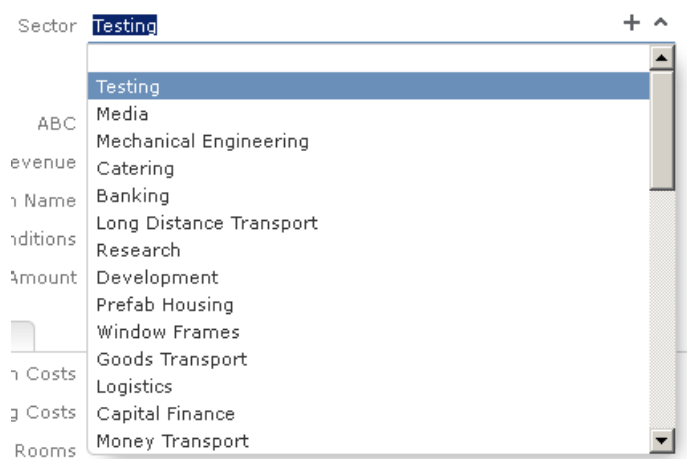
Note: Note: When adding new catalog values in your language, you also need to enter the value in the catalog base language if you are logged on to the system using another language than the catalog base language. If you have the necessary access rights, **Go to Catalog Maintenance** is displayed as a 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.

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, >> on page 25.

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

- Digits
- The date separator defined in your user configuration, >> on page 36.

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, >> on page 25.

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

Note: 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: Note: To disable auto-completion of the year field, contact your Aurea 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, >> on page 36.
- "am" and "pm" if you are using the 12 hour format.
- Spaces

Note: **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, >> on page 67.

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.

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


Note: **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: 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.

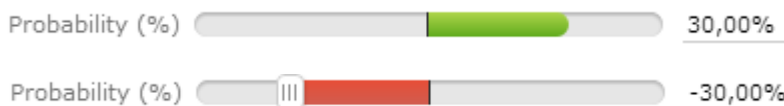
Percentage Field Examples:

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:

media/image100.png

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

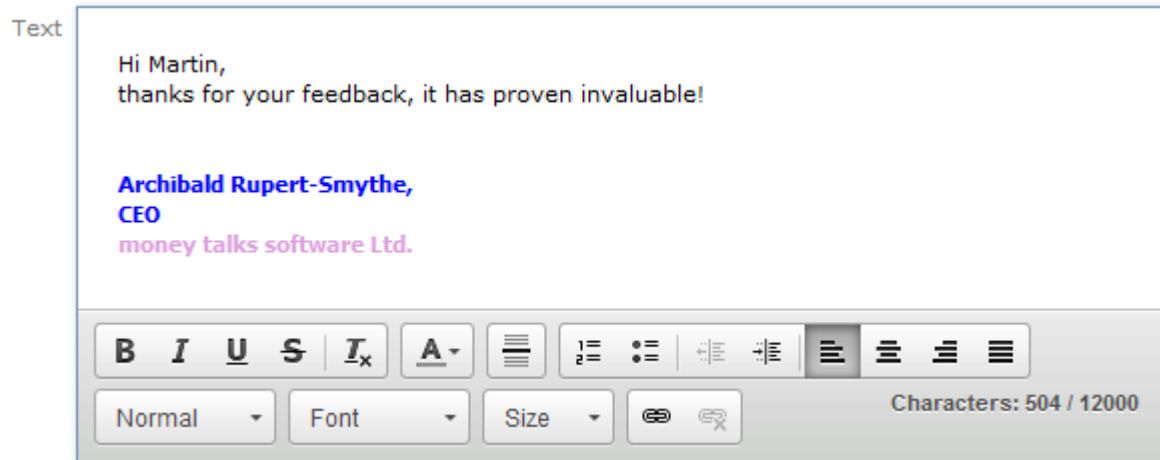
HTML fields allow you to enter and format content using an HTML editor. Your administrator can add HTML fields to info areas.

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

Example:



Field Data Types

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

The following data types are available:





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

Displaying Content from Multiple Fields in a Single Field

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

Address Vorgartenstraße 40
1020 Wien, Austria

The fields are displayed separately in edit mode:

Street	Vorgartenstraße 40
Postal Code	1020  
City	Wien
Country	Austria  

Field Help

Aurea software 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, >> on page 10.

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

System Lock Messages


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

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

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

Sending E-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:

1. 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)
2. You can enter **Additional internal recipients**, >> on page 67.
3. You can enter **Additional external recipients** by entering their e-mail addresses.
4. The **Subject** and **Body** are transferred from the record. You can edit these fields.
5. Determine whether to insert a link to a record or request a receipt using the **Insert Aurea CRM web link**, **Insert Aurea CRM win link**, **Request a delivery Receipt** and **Request a read** receipt check boxes.

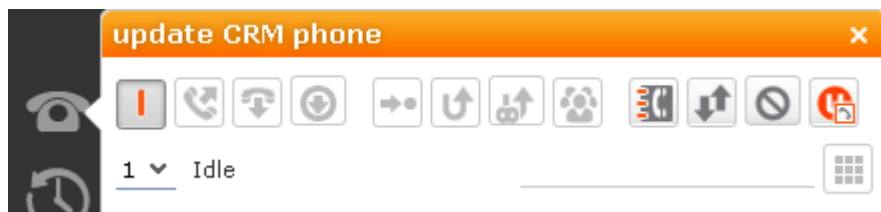
Note: Note: The “Insert Aurea CRM web link” check box can be checked by default, if your administrator has set it that way. You can uncheck it, and in subsequent notifications to this recipient it remains unchecked.

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

Hiding/Showing the CRM.phone toolbar

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

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



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

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

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

Touch Devices



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

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

For information on which browsers are recommended for which operating system, refer to the system requirements available from the Aurea's support 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.

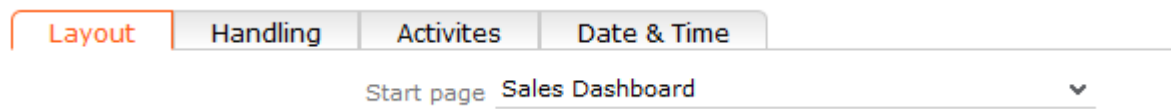
To change your user configuration:

1. Select **Settings > User Configuration** from the menu.
2. Switch to the corresponding tab. The following tabs are displayed:
 - Layout, >> on page 34.
 - Handling, >> on page 34.
 - Activities, >> on page 36.
 - Date & Time, >> on page 36.
3. Configure your settings.
4. Save your settings

Note: 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.

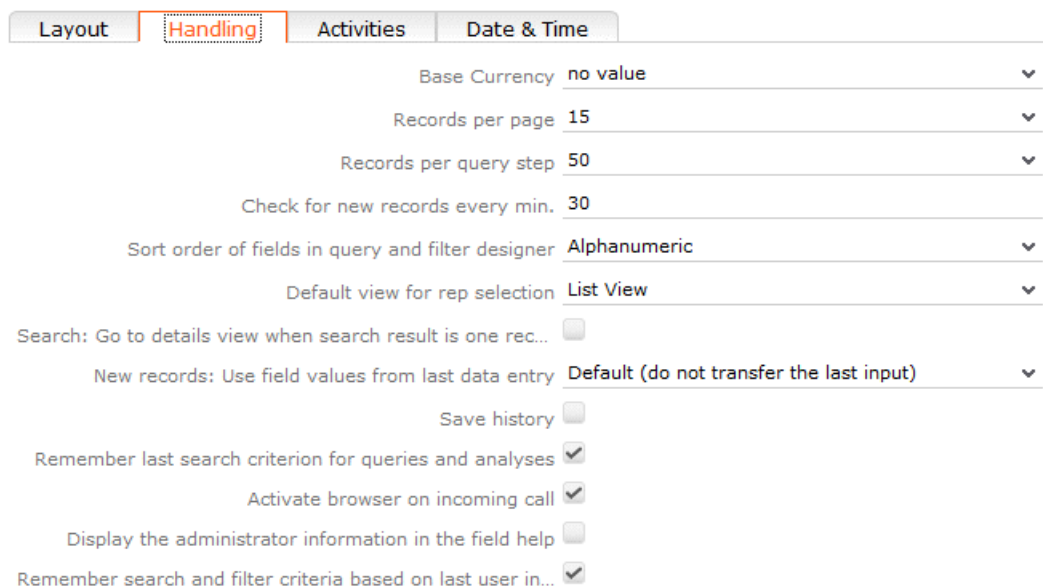
Layout Tab

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, >> on page 11.
- **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, >> on page 7.
 - **Remember last search criterion for queries and analyses:** The last search criterion is displayed when you re-open the search mask.
 - **Activate browser on incoming call:** If the browser is currently in the background (i.e. you are working in another application), the browser is sent to the foreground when receiving a call.
 - **Display the administrator information in the field help:** If information for administrators is available, this information is displayed in the field help.
 - **Remember search and filter criteria based on last user input:** The last search and filter criteria are stored and reloaded when the search is reopened.

Activities Tab

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

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

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

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

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

Date & Time Tab

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

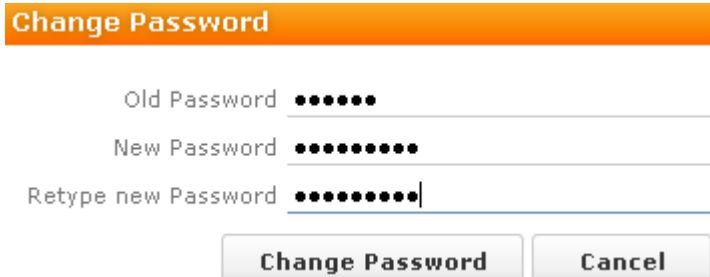
Layout	Handling	Activites	Date & Time
			Holiday calendar no value ▼
			Date format Server ▼
			Date separator Server ▼
			Year format Server ▼
			Time format Server ▼
			Time separator Server ▼
			Decimal separator Server ▼
			Digit grouping symbol Server ▼
			Time zone Server ▼

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

Changing Passwords

To change your password directly from within Aurea CRM web:

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



Change Password

Old Password ●●●●●●

New Password ●●●●●●●●

Retype new Password ●●●●●●●●|

Change Password Cancel

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

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

System Information

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)] [UPDA				
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	<table border="1"> <tr> <td>update.Lib.Services 8.0.1601.46319 update CRM Common Library Services</td> <td>update.Configuration 8.0.1601.46319 update CRM designer Confi</td> </tr> <tr> <td>update.Crm.Base 8.0.1601.46319 update CRM Business Logic Base Layer</td> <td>update.Crm 8.0.1601.46319 update CRM Business Logic</td> </tr> </table>	update.Lib.Services 8.0.1601.46319 update CRM Common Library Services	update.Configuration 8.0.1601.46319 update CRM designer Confi	update.Crm.Base 8.0.1601.46319 update CRM Business Logic Base Layer	update.Crm 8.0.1601.46319 update CRM Business Logic
update.Lib.Services 8.0.1601.46319 update CRM Common Library Services	update.Configuration 8.0.1601.46319 update CRM designer Confi				
update.Crm.Base 8.0.1601.46319 update CRM Business Logic Base Layer	update.Crm 8.0.1601.46319 update CRM Business Logic				

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

Note: **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 Area Rights << < 1 - 20 of 190 > >>

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

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

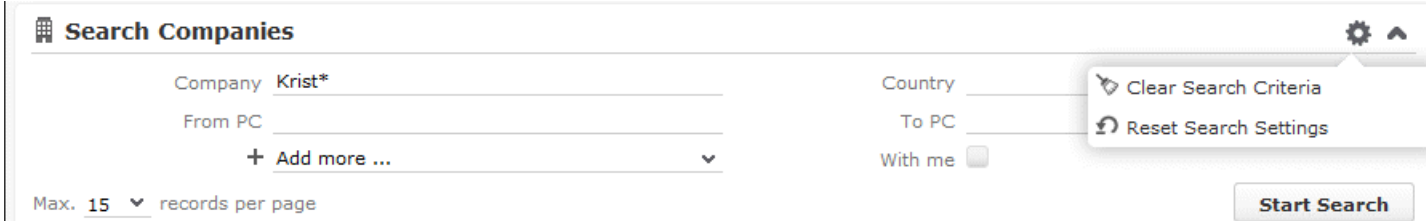
Searching

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.

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 v) buttons.

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

Search Companies ▼ A companies

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

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

Searching For Data

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

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

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

To search for records:

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

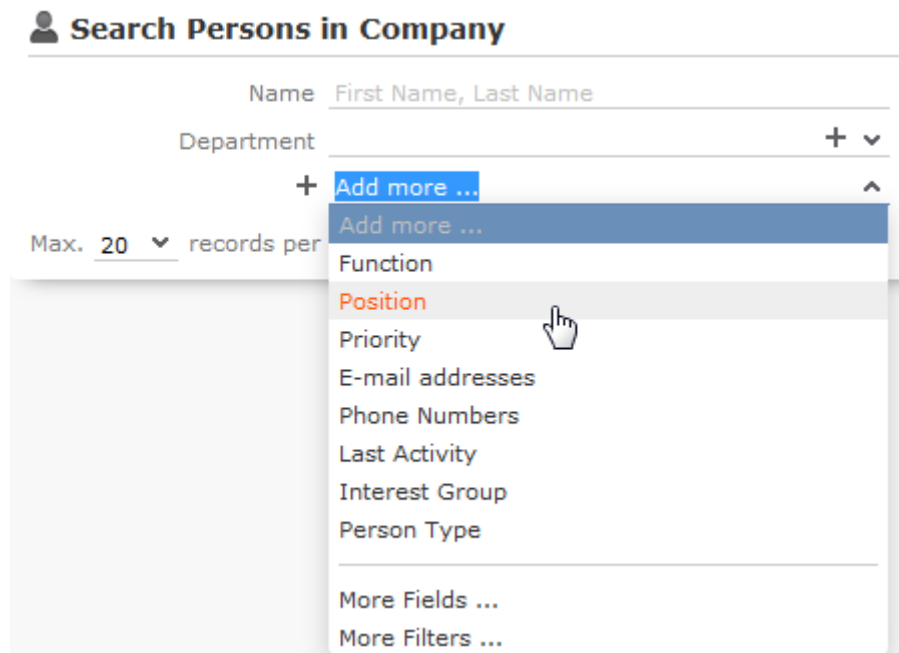
You can define the default number of records per page in the user configuration.

5. Click the **Start Search** button. The results of your query are displayed in the results list below the search area.

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.

No.	Field Name	Field Type
19	Country	Catalog
23	County	Text
4015	Created at	Time
4200	Created by ID	Numeric
4201	Created in Module	Catalog
4010	Created on	Date
4005	Currency	Catalog
30	Date of Birth	Date
4013	DelCd.	Boolean
109	Document 1	Text
110	Document 2	Text
9	E-mail	Text
10	E-mail 2	Text

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

Searching in Combined Fields

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

Name First Name, Last Name

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

Search Persons in Company

Name

Department + ▾

+ Add more ... ▾

Max. records per page

Search Results

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

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

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

Search Persons in Company

Name

Department + ▾

+ Add more ... ▾

Max. records per page

Search Results

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

Searching by Postal Code



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

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

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

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.
- The wildcard '*' can be used in a phonetic search. For example, searching for "Wil*" can return "Wilde".

Selecting Records

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

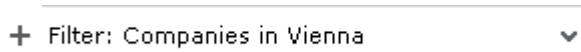
You can edit the selected record directly in the list, open the record in the tab or tree view or display additional details in the details view, >> on page 13 and on page 60. Child records related to the selected record are displayed under **Related Data**, >> on page 60 and on page 13.

Filters

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

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

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



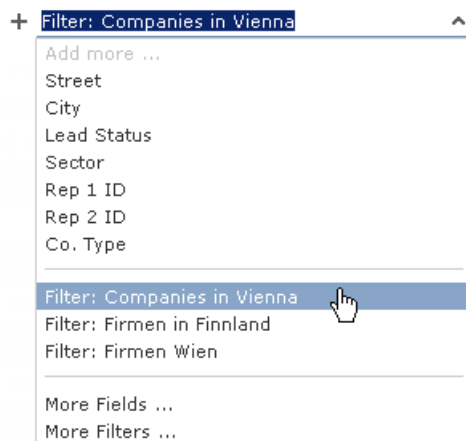
Note: Note: Your administrator can determine that you are not allowed to define filters, but can only select from pre-defined filters.

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 \downarrow next to the field and select **More Filters** from the list.

The **Filter** dialog is displayed.


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

You can define filters in two ways:

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

2. 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.

1. Click on a column heading to sort the list by the entries in that column.
2. Click on  (**Show/Hide Columns**) to determine which columns are displayed in the list.
3. 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.

4. Select a field and click on **Next**.
5. Define the condition. The conditions you can define depend on the **Field Type** (as for queries):

Value(s) of Type in the Activity Info Area
✕

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

Field **Type**

= (equal)
<> (not equal)

Value:

Fixed
Field

Available Fields	Selected Fields
Telephone Letter Event Fax E-mail Info Internet Social	Visit

Previous
OK
Cancel

- Text fields, >> on page 89
- Date fields, >> on page 88 and on page 90
- Catalog fields, >> on page 85 and on page 87
- Numeric fields, >> on page 89
- Boolean fields, >> on page 88
- Time fields, >> on page 89
- Rep fields, >> on page 89 and on page 90

6. Click on **OK**.

The filter you have defined is displayed:

1. 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.

2. You can apply the filter without saving it, however it is 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: Note: If you have unsaved changes, an asterisk (*) is displayed after the filter's name.

3. 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, >> on page 42.
2. Click on  (**Add Info Area**).

Note: 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.


Search Companies

Company

Country City

From Postal Code To Postal Code





Co. Type ABC

Rep 

With me

max. Records per page

Search Results New

	Logo	Company	Lead S...	Country	P...	City	Street
		Krist Austria AG	 Cold	Austria	1040	Wien	Operngas
		Krist Austria AG	 Cold	Austria	1040	Wien	Operngas
		Krist OY	 Prospect	Finland	00120	Helsinki	Mannerh

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, >> on page 11.

Note: 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, >> on page 34.

Column Settings

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

Sorting Lists

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

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

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

To sort entries in a list:

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

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

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

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

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

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

Changing Column Order

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

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

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

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

Changing Column Width

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

To change the column width:

1. Position the cursor over the field separator.

Postal Code	City
1030	Vienna
1040	Vienna

2. Drag the separator to the desired position.

Selecting the Fields in the List

You can determine which fields are displayed in the list.

To select fields:

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

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

Modify List Fields
□ ×

Select Info Area
Person Default

Available Fields

Field Name
0 - PE-StaNo
1 - PE-SerNo
2 - Form of address
3 - Last Name
4 - First Name
5 - E-mail
6 - Country
7 - Postal Code
8 - City
9 - Street

Output Fields

4 - First Name
3 - Last Name
7 - Postal Code
8 - City
6 - Country
13 - Private Tel.
5 - E-mail

Sort by

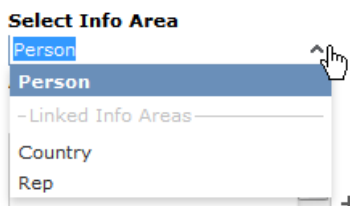
3 - Last Name

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

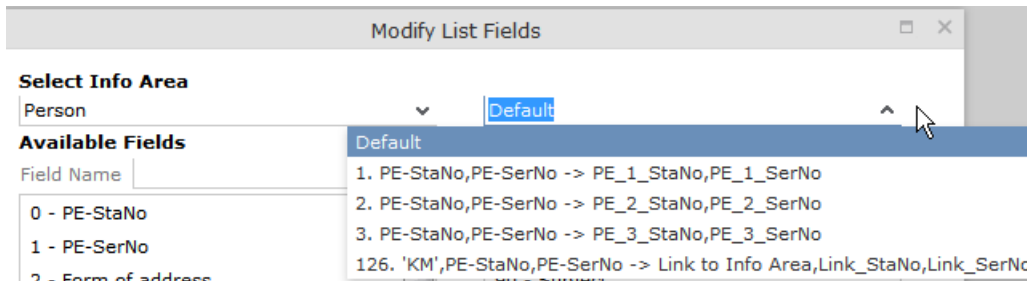
2. Determine which fields to display in the list and the order of the columns:

- **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: 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.

1. Enter the phone number or e-mail address you wish to search for.
2. Enable the **Original number** check box if you wish to automatically add the appropriate country and area codes entered in your telephone profile.
3. Click on **Start Search**.

The records found are listed.

Note: 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).

4. 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: 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, >> on page 57.


Example: Adding a new company

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



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

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

1. Enter all the relevant information.
2. Click on  (**Save**). Aurea CRM web automatically checks whether the company is already stored in the database, >> on page 57.

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, >> on page 52.
- From any info area, >> on page 53.
- In the tree view of the parent record, >> on page 54.

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, >> on page 51.

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  (**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.

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

Create Person

Search Companies

Company

From ZIP

[+ Add more ...](#) ▼


Country

To ZIP

Items I Own



Max. Records / Page

Search Results << < 1 - 9 of 9 > >>

	Company	Lead S...	Country	P...	City
	Krist	Cold			
	Krist	Cold	Finland	00120	Helsinki
	Krist A OY21-17	Cold	Suomi	00120	Helsinki
	Krist Aut AG	Cold	Austria	1040	Wien
	Krist Aut. AG	Cold	Austria	8080	Graz
	Krist Aut. AG	Cold	Finland	00147	Helsinki
	Krist Intl. OY	Customer	Finland	00120	Helsinki
	Krist ÖsterreichHolzimportGes.m.b.H. & C...	Cold	Austria	1040	Wien
	Krist OY	Cold	Suomi		Helsinki

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

New Person in Company

 Save
 Paste

Form of address

First Name

Tel 1

Title

Last Name

Mobile Tel.

Address

Position

Classification

Postal Code

Street

E-mail 1

City

Country

E-mail 2

3. Enter the relevant data.

4. Click **Save** to add the new person.
5. The record is displayed in the default view.

Adding Child Records in the Tree View

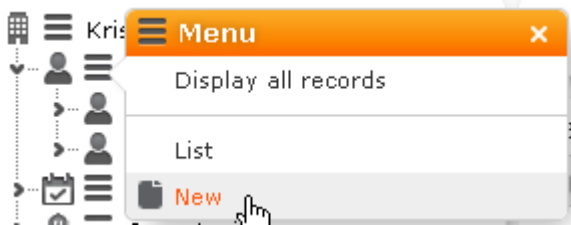
You can add new child records in the tree view of a record (e.g. a company) using the child info area or child records' context menu (e.g. a person).

As the parent record is uniquely identified, the input mask is displayed immediately. Proceed as with independent records, >> on page 51.

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.

Company Krist Aut. AG Helsinki, Finland	Synonym E-mail 1 info@krist.fi Website www.krist.fi	Co. Type Telepho... <u>12345</u> Rep 1	Sector Fax 123 Rep 2 Mir
---	--	--	--------------------------------

- ☰ Krist Aut. AG
 - ☰ Persons
 - 👤 Ms. Tarja Halonen
 - 👤 Mr. Kristus Krist
 - 📅 Activities
 - 💰 Opportunities
 - 📈 Offers
 - 📦 Orders
 - 🏠 Installed Bases
 - 🗨️ Service Contracts
 - 🎫 Tickets
 - 📄 Document Link

👤 New Person in Company

Save Paste

Form of address Mr. Title _____

First Name Jussi Last Name Ristih

Tel 1 _____ Mobile Tel. _____

Address Position Classification

Postal Code _____ City _____

Street _____ Country _____

E-mail 1 _____ E-mail 2 _____

Parent Data

☰ ♥ 📱 [Company Krist Aut. AG](#)

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

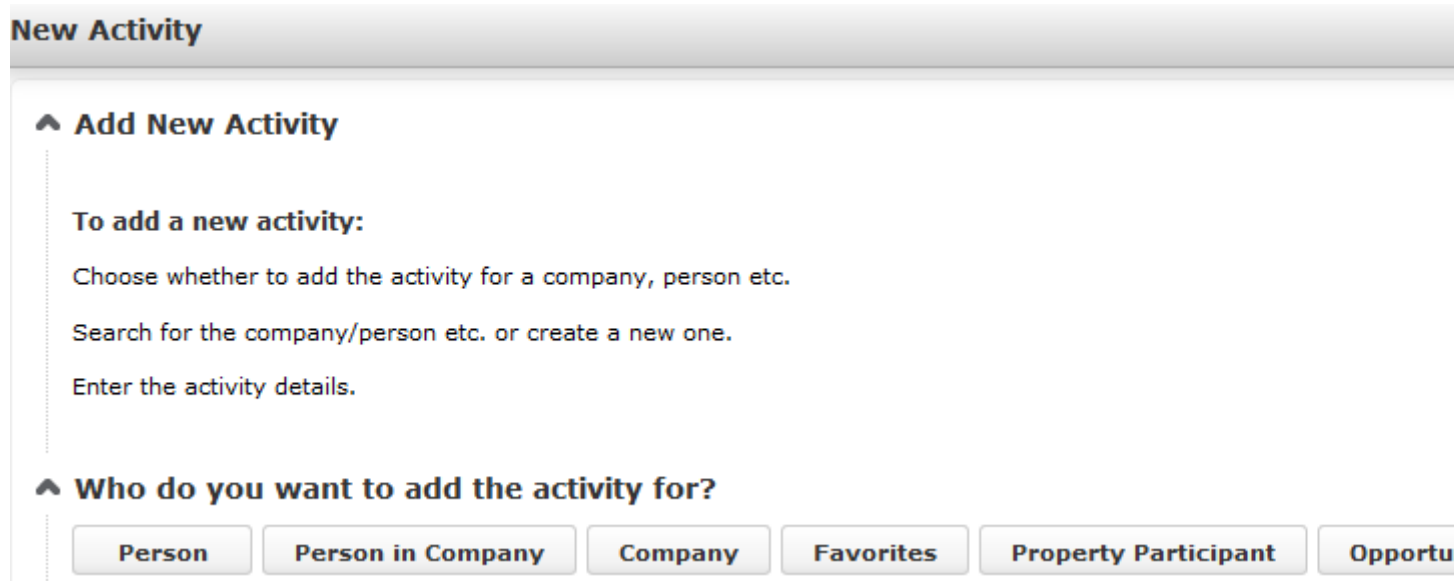
You are guided through the steps of adding new records in various info areas, in particular if new records cannot be added directly due to a lack of information. For example, an activity can only be added if a company or person has been selected.

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.



New Activity

▲ **Add New Activity**

To add a new activity:

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

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

Enter the activity details.

▲ **Who do you want to add the activity for?**

Person Person in Company Company Favorites Property Participant Opportu

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.

New Activity

▲ Add a new activity


To create a new activity:

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

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

Enter the activity details.

▲ With whom do you want to create the activity?

 Recently used persons

The search returned no results.

4. Search for the desired person.
5. Enter the desired data, for example any additional participants.

 **New: Activity**




Template name  

Type  Visit

Rep SU0001 

Purpose Support

Subject

Assigned by SU0001 

Result

Starts on 10.10.2013

Status Scheduled

Satisfaction  Indi

Starts at 17:32

Ends on

Priority   

Follow-up on

Ends at

Location

Private



Internal Participants & Content


Agenda Items

Survey

Products

Marketing Activity









Manage your company's internal participants here. External participants are managed below.



Participant(s) Required  Add a value...

Optional

For Information


Text

B ***I*** **U** ~~**S**~~ ***I_x***
A








Format
Font






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, >> on page 11.

Duplicates Found
□ ×

The following records already exist:

Results (9 record(s)) << < 1 - 9 of 9 > >>

	Company	Country	Postal Code	City	Street
	Krist	Finland	00120	Helsinki	Mannerheimin Tie...
	Krist				
	Krist A OY21-17	Suomi	00120	Helsinki	Mannerhiemintie ...
	Krist Aut AG	Austria	1040	Wien	Operngasse 17
	Krist Aut. AG	Finland	00147	Helsinki	Kruununtie 4
	Krist Aut. AG	Austria	8888	Graz	Appenzelstraße 245

What would you like to do?

- Go to existing record**
The new record is not created.
- Complement existing record**
Select this option to enter data from the new record in empty fields in the existing record. The existing record is retained and the new record is not added.
- Update existing record**
Select this option to transfer all the data entered in the fields of the new record to the existing record; i.e. the existing fields are overwritten if new data is entered. The existing record is retained.
- Update new record with existing data**
Select this option to copy all the fields in the existing record to the new record. A new record is created.
- Complement new record with existing data**
Select this option to enter data from the existing record in empty fields in the new record. A new record is created.
- Create new record anyway**

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.

Address Check

You have entered the following address information:

Country Austria Postal Code 1040
City Wien Street

Results (5 record(s))

Score	Street	Postal Code	City	Country
98	Operngasse 25	1040	Vienna	Austria
97	Operngasse 50	1040	Vienna	Austria
96	Opernheide 17-24	1050	Vienna	Austria
95	Opernheide 17-24	1040	Vienna	Austria
94	Opernheide 17-24	1040	Vienna	Belgium

■ Identical value
 ■ Different value
 ■ Empty record value
 ■ Invalid value

OK Cancel

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:

New: Company

Save Create from signature

Copy from Signature or Website

Use rules for Sample Parser

TestIt Software AG
 Haferngasse 27
 1060 Wien
 Österreich

Telefon: +43 (1) 87855-0
 Fax: +43 (1) 87855
 info@testit.at | http://www.testit.at

Cou

TestIt Software AG	Company
Haferngasse 27	Street
1060	Postal Code
Wien	City
!	Country

Austria
 China
 Croatia

Apply

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.

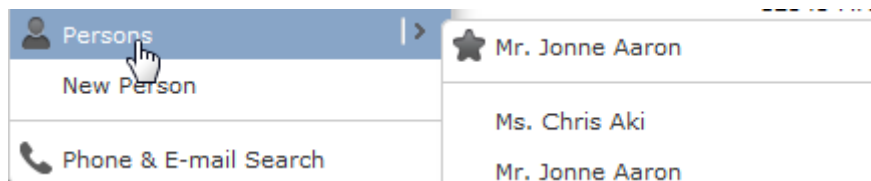
5. Click on **Apply** to transfer the data to the record once the information has been assigned correctly.

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, >> on page 8 and on page 7.



You can edit records in list and tab view. You are asked to confirm the deletion of records, >> on page 60, on page 59 and on page 63.

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

3. The record is displayed in the tab view.

Company Krist Intl. OY

Menu | Edit | Save | Cancel | Copy | ▼

Company Krist Intl. OY

Street Mannerheimintie 145 Postal Code 00120

City Helsinki Country Finland

Address | Type | Classification | Event

Country Code Area Code Telephone 003

Fax E-mail 1 E-mail 2

Rep 1 ID Miranda Meyer Rep 2 ID Miranda Meyer Website

Label Andis Label

Related Data

Persons | Activities | Opportunities | Offers | Orders | Installed Bases | Service Con...

◀ ◀ 1 - 6 of 6 ▶ ▶

	Last Name	Fi...	F...	Depar...	A...	Company	E-m...	Tel 2
	Saarinen	Aino				Krist Intl. OY		
	Aaron	Jonne		Finances	1212	<u>0...</u> Krist Intl. OY	<u>ionne.aa...</u>	
	Omena	Jorma		Research		Krist Intl. OY		
	Lehtolainen	Leena		Research		Krist Intl. OY	<u>leena@ki...</u>	
	Riistiholinen	Leena				Krist Intl. OY		
	Jahonnen	Max		Internal R...		Krist Intl. OY	<u>Max@kri...</u>	

4. Switch to edit mode using the following options:

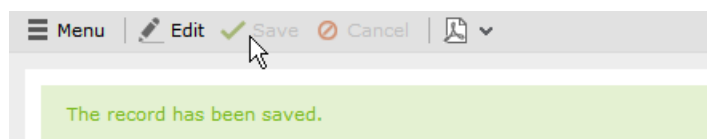
- Click on (**Edit**).
- Double-click on a field or field name in the mask. The field is automatically given focus.

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, >> on page 10.


Buttons in the Tab View

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




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

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, >> on page 25.
 - Select reps from the dialog box, >> on page 28.
 - Use the small calendar to enter dates, >> on page 27.
 - Click on  (**Select**) next to a link field to select a record in another info area, >> on page 28.
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: 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.

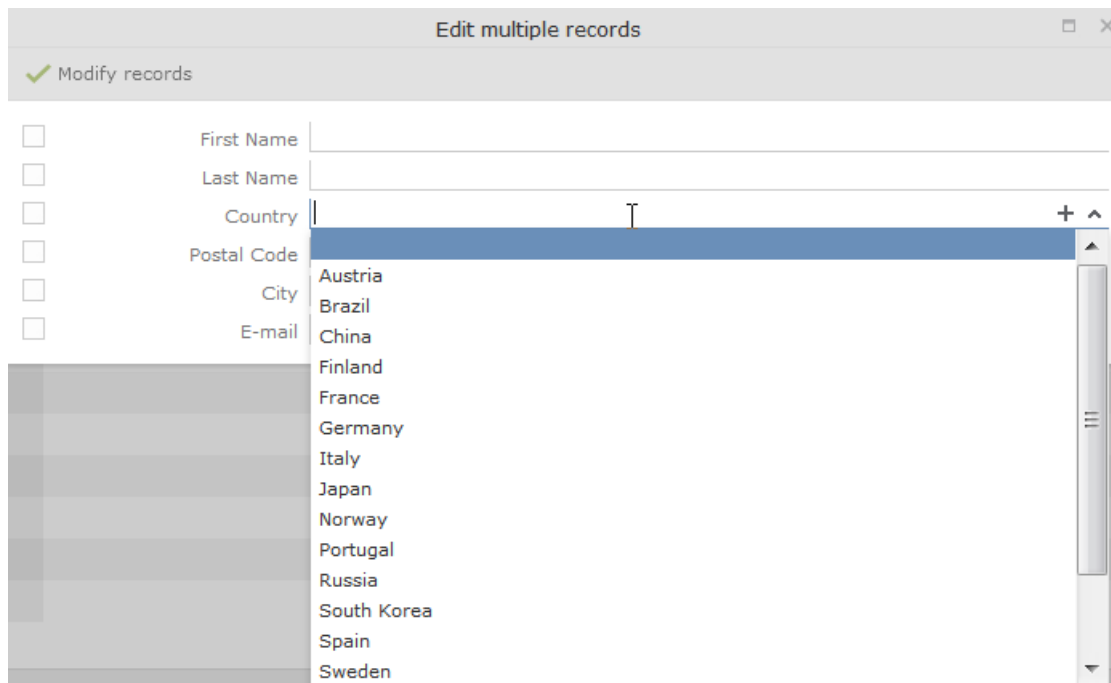
Note: Note: Selecting multiple records is only possible for records displayed on the same page in the results list. You cannot navigate to other pages using the cursor keys without losing the current selection.

Editing Multiple Records

To edit multiple records in a list:

1. Select the desired records, >> on page 61.
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, >> on page 61.
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.

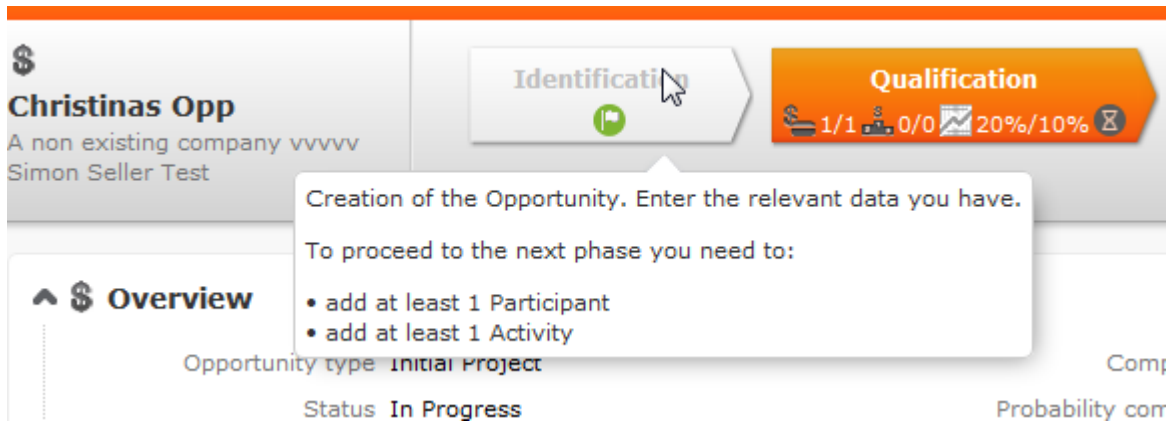
When editing data, only one phase is currently active. The active phase is displayed in the process's header in orange.

The screenshot displays a process header for 'Christinas Opp' with three phases: Identification, Qualification (active), and Cover Buying Center. The active phase, Qualification, is highlighted in orange and shows progress indicators: 1/1 tasks completed, 0/0 sub-tasks, and a 20%/10% completion rate. Below the header is an 'Overview' section with the following details:

Opportunity type	Initial Project	Completion Date	08.01.2013
Status	In Progress	Probability completion d...	Unlikely
Reason	ABC	Investment Prob. (%)	<div style="width: 100%; background-color: orange;"></div>
Quick Opportunity	<input type="checkbox"/>	Probability (%)	<div style="width: 100%; background-color: orange;"></div>
No Competitor	<input checked="" type="checkbox"/>	Likelihood	Risky

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.

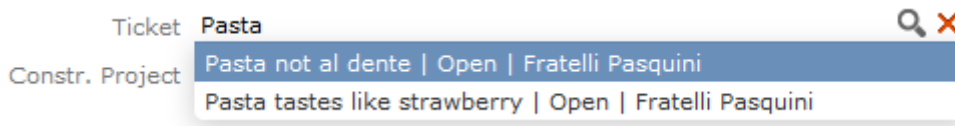


Linking Records

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:

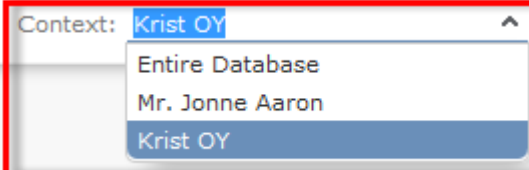
- Enter all or a portion of the record's name in the link field. Any matching results in the target info area are listed.



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

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

max. 15 ▾ Records per page



Deleting Records

To delete records:

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

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

Copying the Link to a Record to the Clipboard

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

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

To copy a link to the clipboard:

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

Note: 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).





 Add Visit
  Timeline
  Customer Fact Sheet
  Potentials

Overview

Company Krist Austria AG
 Synonym
 Rep [Access denied](#)

Address Operngasse 17 - 21
 1040 Wien
 Austria

Telephone
 Fax
 E-mail
 Website

Classification

Co. Type ABC
 Sector Customer since

Lead Status
 Lead Priority


Comment

Logo

Business Data

Settings

Related Data


 Addresses 
 Contact Time 
 Potential 
 Note 
 Portfolio 
 Ext. Company Key 

 Most R

ID	Date	Time	Field	Changed...	Old Value	New Value	App
4	19.03.2013	11:28:29.104	Label	SU		Deutsch	Mai
2	18.03.2013	16:24:24.812	Address	Simon Seller ...		Operngasse ...	web
1	18.03.2013	16:24:24.796	Date - Updat...	Simon Seller ...		18.03.2013	web

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:

Exporting

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

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


Examples:

-  Microsoft Excel (current page)
-  Microsoft Excel (all records)
-  Microsoft Word
-  HTML (corresponds to a web-based print preview)
-  PDF (the document cannot be edited).

All fields (including empty fields) are exported.

Exporting from Tab View

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



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

Exporting from a List

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

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

To export data in a list:

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

The records are exported to the file.

Export Examples

Example: HTML export of a person record in tab view:

Update

Report | update.web

Mr. Jonne Aaron

Main data

Form of address	Mr.	Title	
First Name	Jonne	Last Name	Aaron
Tel 1	0345934095340593	Mobile Tel.	
Priority		Lead Status	Prospect
Company			

Address

Postal Code		City	Helsinki
Street	Mannerheimintie 145	Country	
E-mail 1	jonne.aaron@krist-intl.fi	E-mail 2	jonne.aaron@krist-intl.fi

Position

Language	Deutsch	Acad. Title	Mag
Department	Finances	Position	
Function		Internal Name	
Rep	Miranda Meyer	Office Rep	

Classification

Buying Center Role		Satisfaction	Indifferent
Label		Preferred Channel	
Date of Birth		Last Activity	20.07.2012
Text			

Speaker

Person Type		Person Type 2	
Person Type 3		Person Type 4	
Person Type 5		Lecture Evaluation	
Fee		Currency	
Travel Flat Rate			

Example: PDF export from the person results list:

Company	Lead Status	Country	Postal Code	City	Street
Krist	Cold				
Krist	Cold	Finland	00120	Helsinki	Mannerheimin Tie 123
Krist A OY21-17	Cold	Suomi	00120	Helsinki	Mannerhiemintie 145
Krist Aut AG	Cold	Austria	1040	Wien	Operngasse 17
Krist Aut. AG	Cold	Austria	8080	Graz	Annenstraße 345
Krist Aut. AG	Cold	Finland	00147	Helsinki	Kruununtie 4
Krist Intl. OY	Customer	Finland	00120	Helsinki	Mannerheimintie 145
Krist ÖsterreichHolzimportGes.m.b.H. & Co. KG	Cold	Austria	1040	Wien	Operngasse 21
Krist OY	Cold	Suomi		Helsinki	Mannerheimintie 123

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

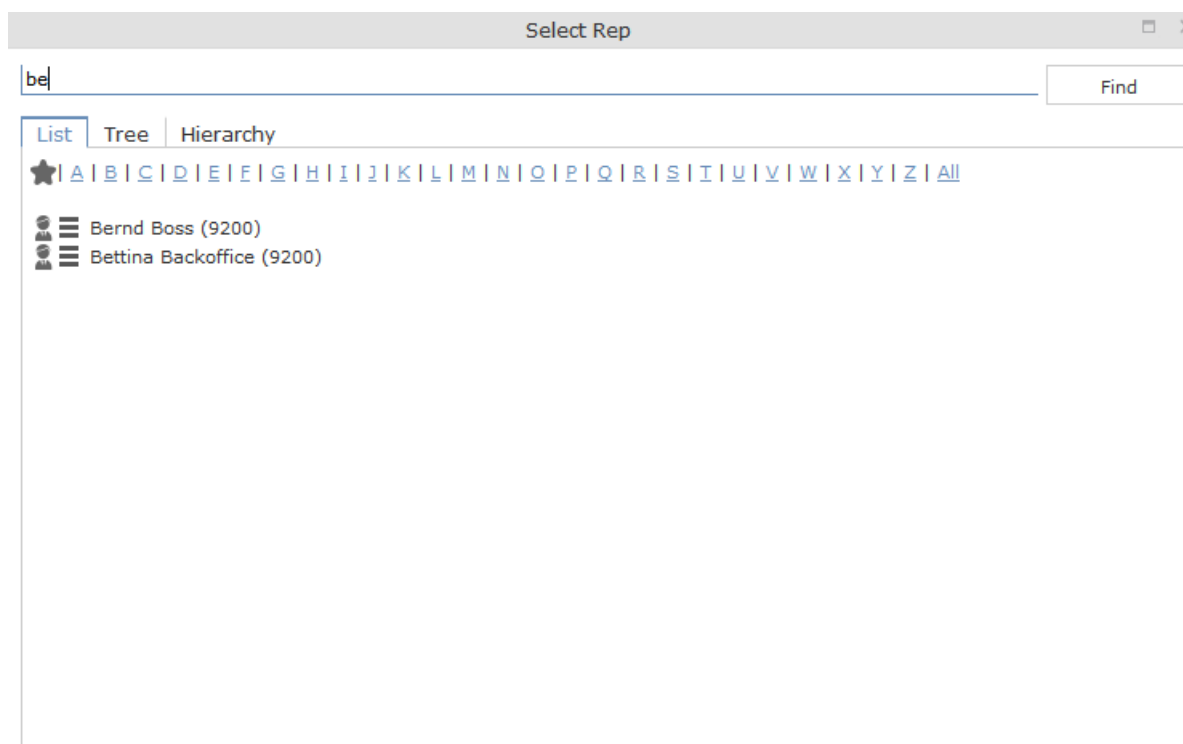
When entering a rep in a rep field, you can select the rep from either the list or tree view. By default the list view is displayed.

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: 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.

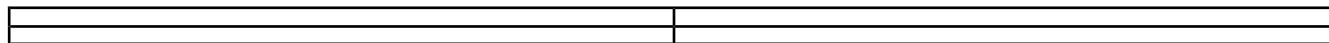
1. Click on a name, if more than one rep meets the search criteria.
The selected name is entered in the rep field.



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.




1. 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.
2. Double-click on the entry or choose **Select** from the rep's context menu to enter the rep in the **Rep** field.

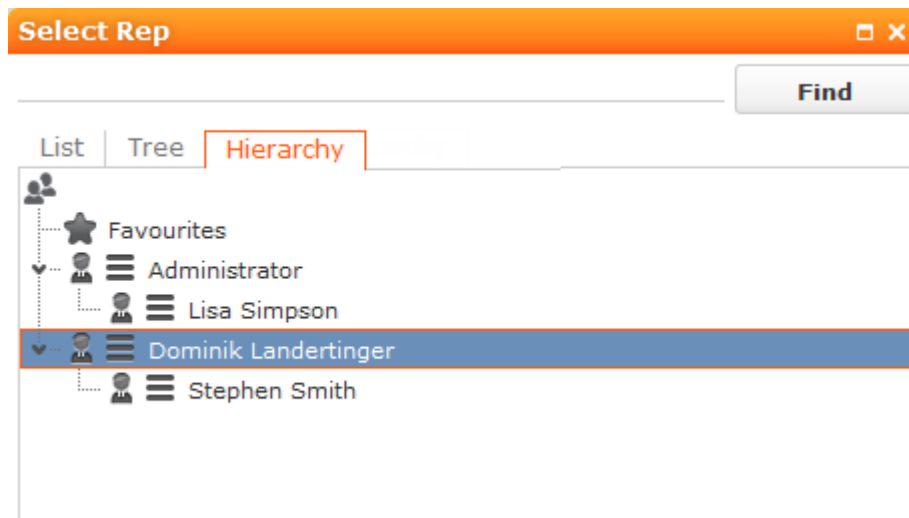
Selecting Reps in the Rep Hierarchy

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: 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: 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, >> on page 60.
3. Disable the **Inactive** check box for the participant who should be set as the active participant in their role.

Note: 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  (**Default Values**) in the activity search.
2. Define the default values.
3. Click on  (**Save**) to save the default values.

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

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

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

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


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

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

Note: 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 is no longer displayed correctly.


Applying Default Values

To apply a previously defined set of default values:

1. Click on  (**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.

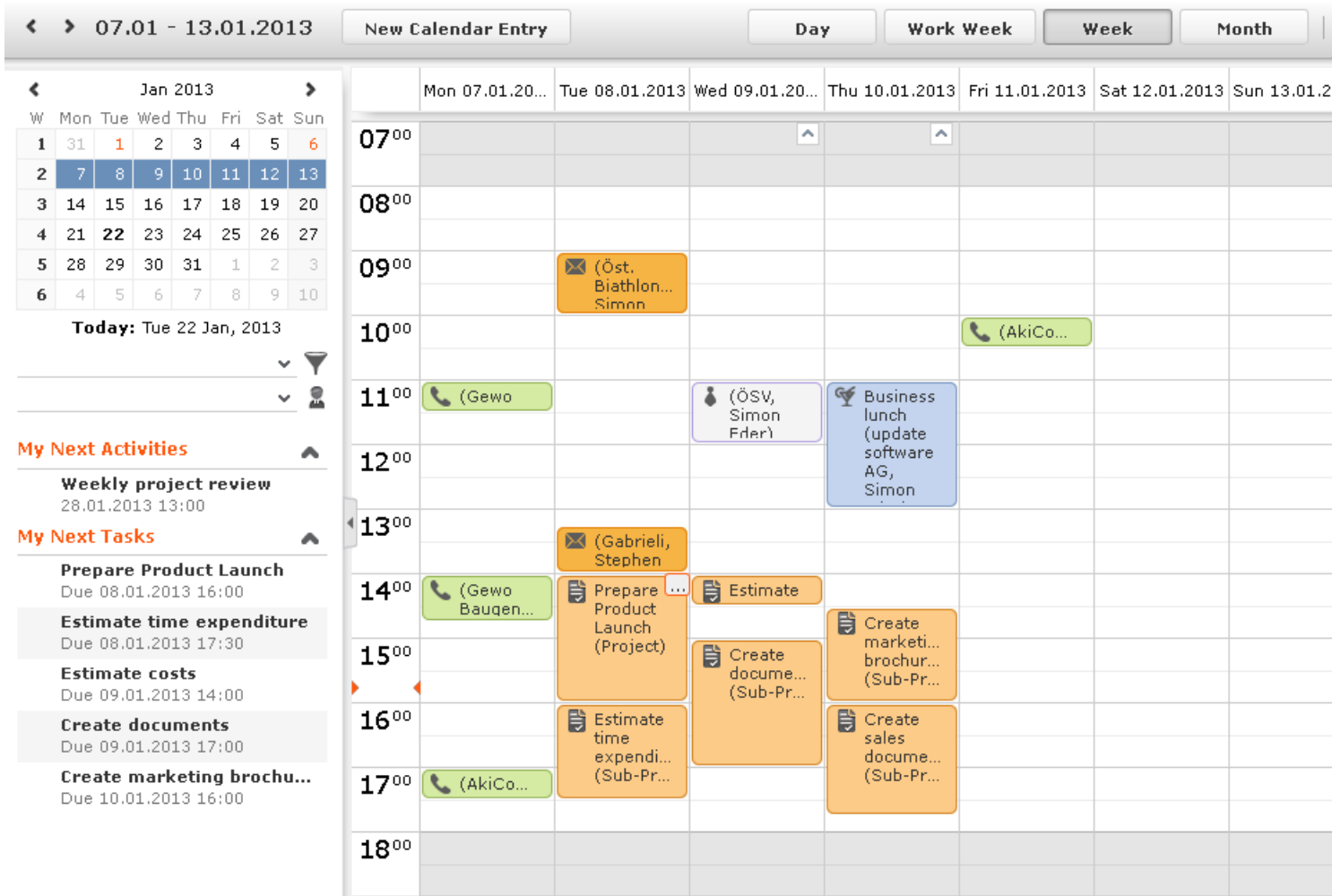
Calendar

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

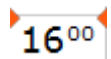
You can define which holidays are displayed in your calendar, the data displayed in the left sidebar etc. in the user configuration, >> on page 34.

Note: 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.

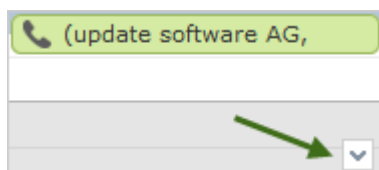
The calendar in Aurea CRM web contains the following elements:



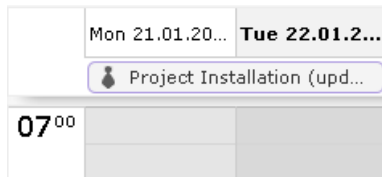
- Different types of appointment are indicated using different icons (for telephone calls, visits etc.).
- You can determine that certain entries are color-coded, e.g. based on the type of appointments or status (⚙️ **Edit Settings**).
- Click on the entries in the header to determine whether to display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



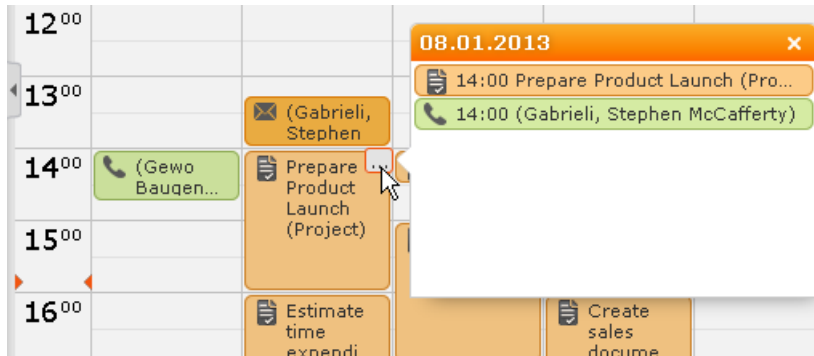
- If appointments have been entered that cannot be displayed in the visible area, the following icon is displayed at the bottom edge of the visible area:



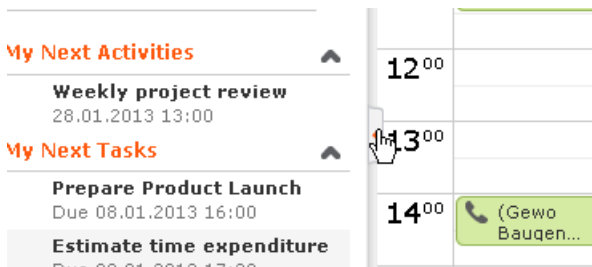
- Appointments lasting all day or spanning several days are displayed in a bar at the top of the calendar (below the date).



- 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:



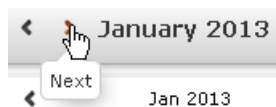
Your upcoming activities, tasks and any absences are displayed in the left sidebar by default. You can also select and define filter sets or rep groups.

- Holidays are color-coded.

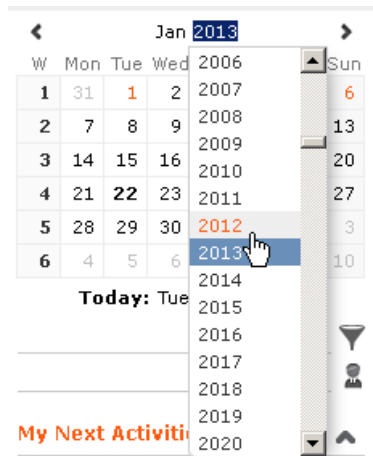
Navigating in the Calendar


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, >> on page 74.

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.

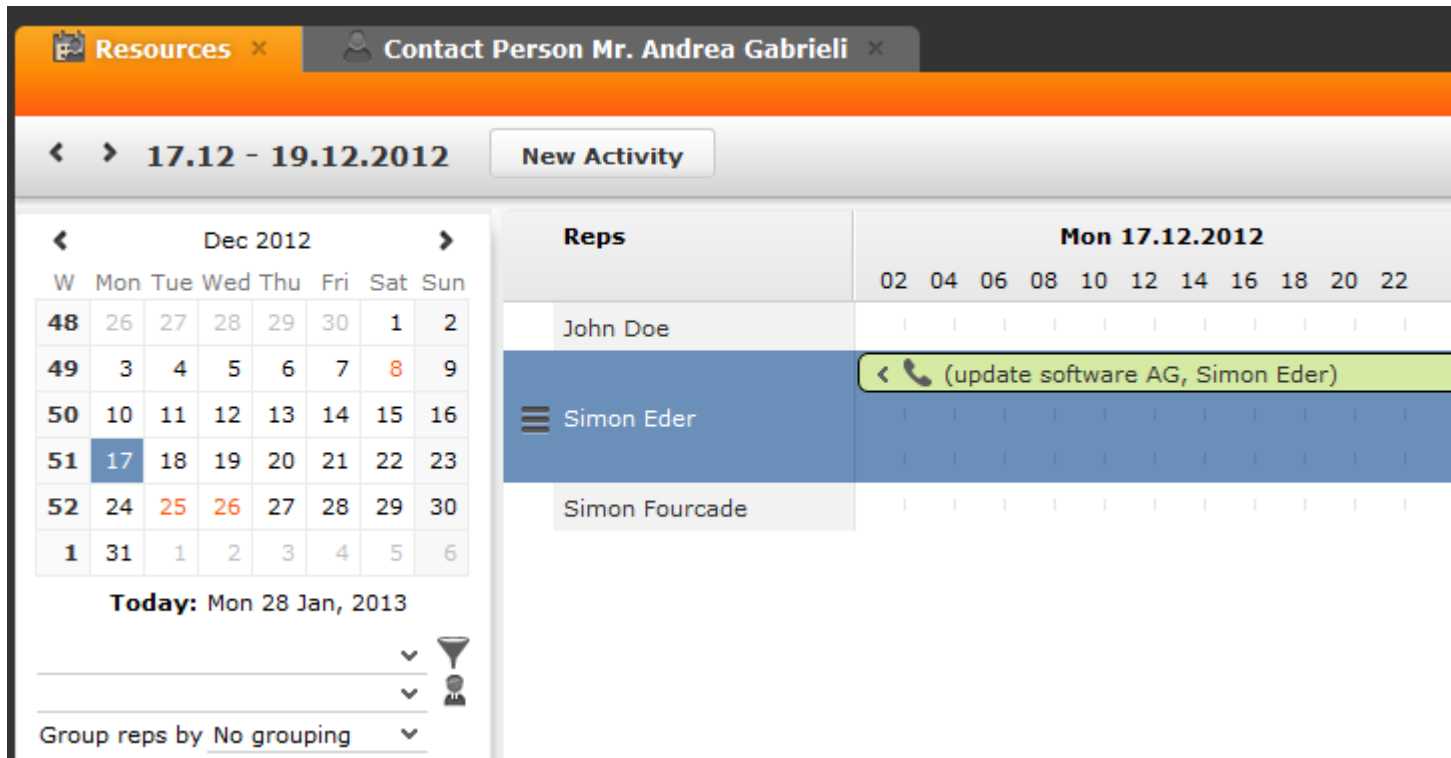
Click on  (**Daily and Weekly Planning**) in the calendar to switch to the Daily and Weekly Planning area.

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, >> on page 75.

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: 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: 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.

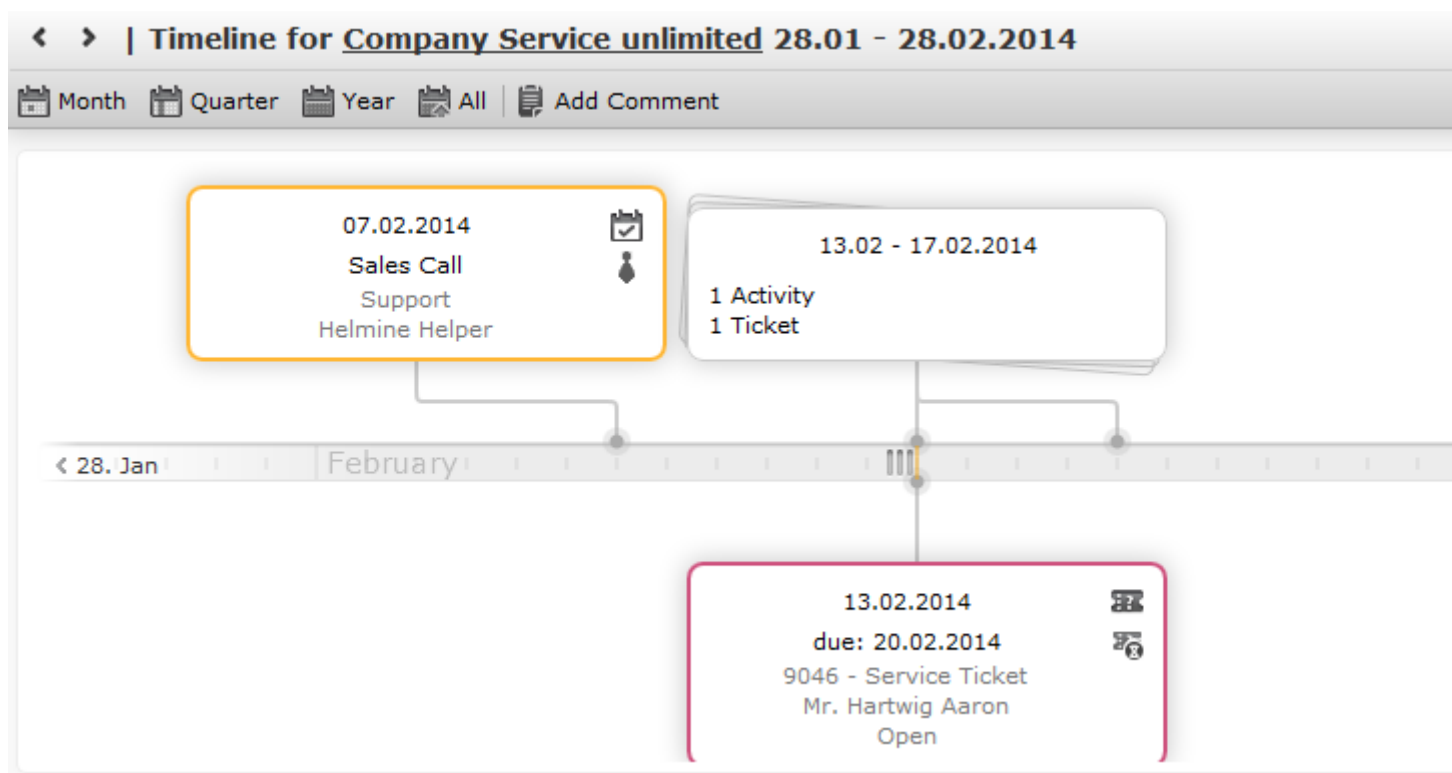
The selected records are displayed along a time axis in so-called "bubbles". You can configure the overview to display different types of records using different colors, icons and text.



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, >> on page 39.
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 or monthly view, the view switches to the previous quarter or month.
 - Drag the  icon in the scroll bar to the left or right.
 - Click on the date at the far left or right of the scroll bar to move to the previous or next time period.
 - 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: 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.

The screenshot displays a CRM timeline interface. At the top, a navigation bar shows '< 1. Jul Q3'. Below it, a horizontal timeline has several activity bubbles. One bubble for '30.07.2013' is titled 'Besprechungsprotokoll mailen' by 'Miranda Meyer'. Another bubble for '06.08 - 02.09.2013' contains '9 Activities'. A third bubble for '09.09 - 30.09.2013' contains '3 Activities'. Below the timeline, a detailed view for the selected activity '09.09.2013 18:05: Telephone for Krist OY' is shown. This view includes a menu with options like 'Menu', 'Edit', 'Save', 'Cancel', 'Recurrence...', and 'Send as E-mail'. It also displays fields for 'Subject', 'Starts on' (09.09.2013), 'Starts at' (18:05), 'Duration', 'Unit', 'Type' (Telephone), and 'Status' (Scheduled). The 'Rep ID' is 'Miranda Meyer' and the 'Particip...' field is 'Required Miranda Meyer'. There are also 'Optional' and 'For Information' options.


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](#)

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.

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

Query my visits

✓ Save ✗ Delete ➦ Send to Reps... ➡ Run Query in Background ➡ Run Query

Query name

Private query
 Public query

Include Affiliations

UQL Syntax

```
select (Contact, Date, EndDate) from (MA)
where (Contact='#1' AND Date='20141101' AND EndDate='20141231')
orderby (Date)
```

Formatted

Activity

Output Fields: [Type](#), [Starts on](#), [Ends on](#)

Sort by [Starts on](#)

	<input checked="" type="checkbox"/> Type = "Visit"
<input checked="" type="checkbox"/> AND	<input checked="" type="checkbox"/> Starts on = "01.11.2014"
	<input checked="" type="checkbox"/> Ends on = "31.12.2014"

Max. rows

➡ Run Query ➡ Run Query in Background


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

Defining a New Query

You can define queries in two ways:

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


To define a new query:

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

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

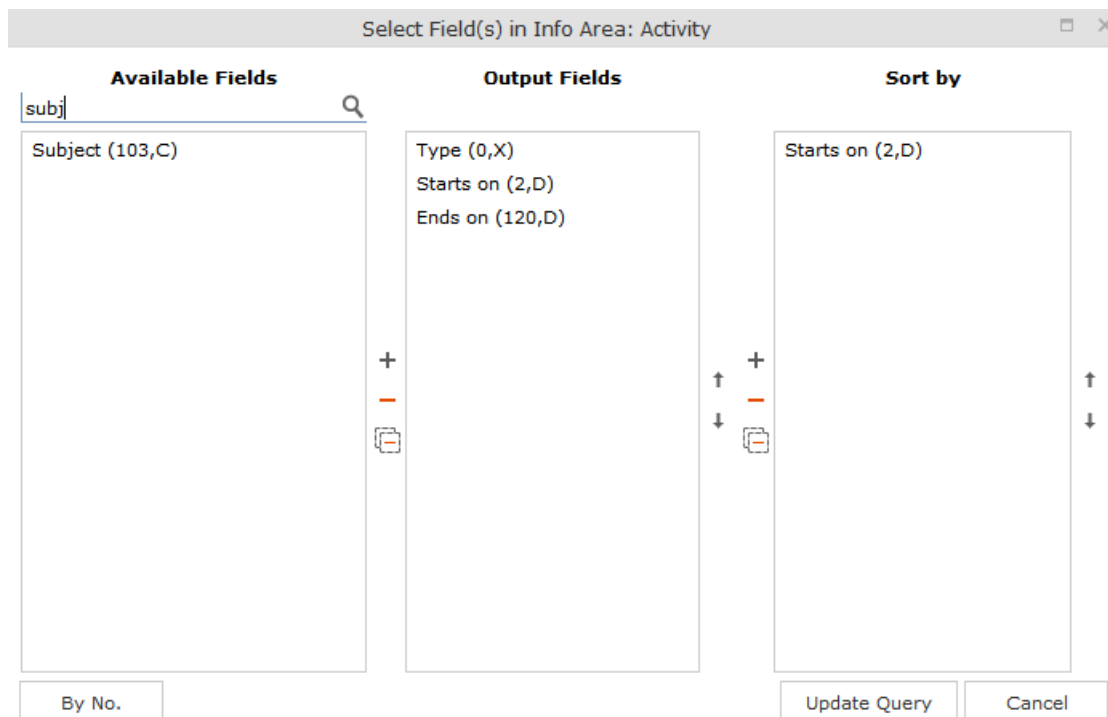
1. Enter a name for the query in the **Query name** field. Define the query as either a **Private query** or a **Public query**. Private queries can only be accessed by the rep that created the query.

Note: Note: You can however provide other users with private queries, >> on page 95.





2. 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>.
3. Click on  (**Add Info Area**) to open the **Select Info Area** dialog box.


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





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



5. 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, >> on page 30.
 - 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: Note: You can select multiple fields by pressing the Ctrl key, >> on page 61.

6. Click the **Add to Query** button to add your selection to the query.
7. Define the conditions in the query, >> on page 84.
8. 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 are asked whether you wish to overwrite the existing query.

Loading Queries

To load an existing query:

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


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

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

The query is loaded.

1. Edit the query by adding or removing info areas and conditions.
2. Define the maximum number of rows displayed by the query.
3. 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, >> on page 34. 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.

4. 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.
5. Click  (**Export (MS Excel)**) to export your query to an Excel file, >> on page 64.

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: 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), >> on page 96.

To execute a query:

1. Load the desired query, >> on page 80.
2. You can execute the query in two ways:
 - Click **»» (Run Query)**. The query is executed immediately and you can only continue working once it has finished executing.
 - Click on **»» (Run Query in Background)**. You can continue working with the application and the query is scheduled for execution in the background. You receive a message when the query has executed.

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, >> on page 34. 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: 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 **X (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: 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: 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.

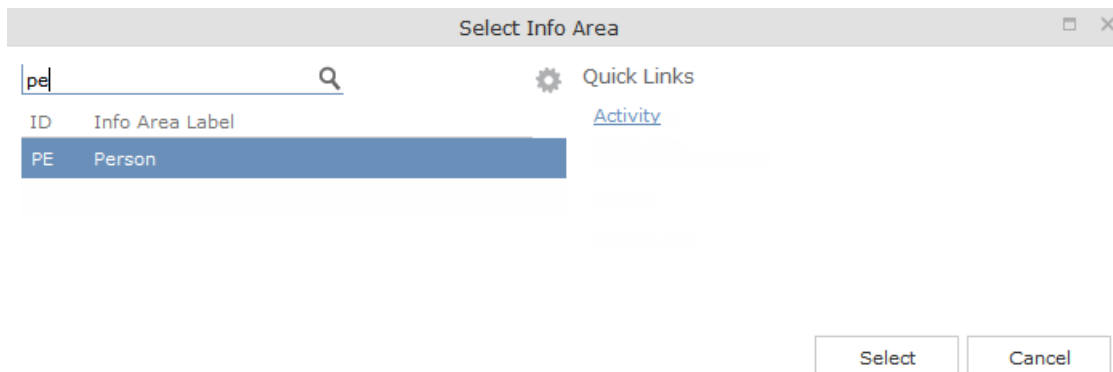
To add a child info area:

1. Load a query, >> on page 80.
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.

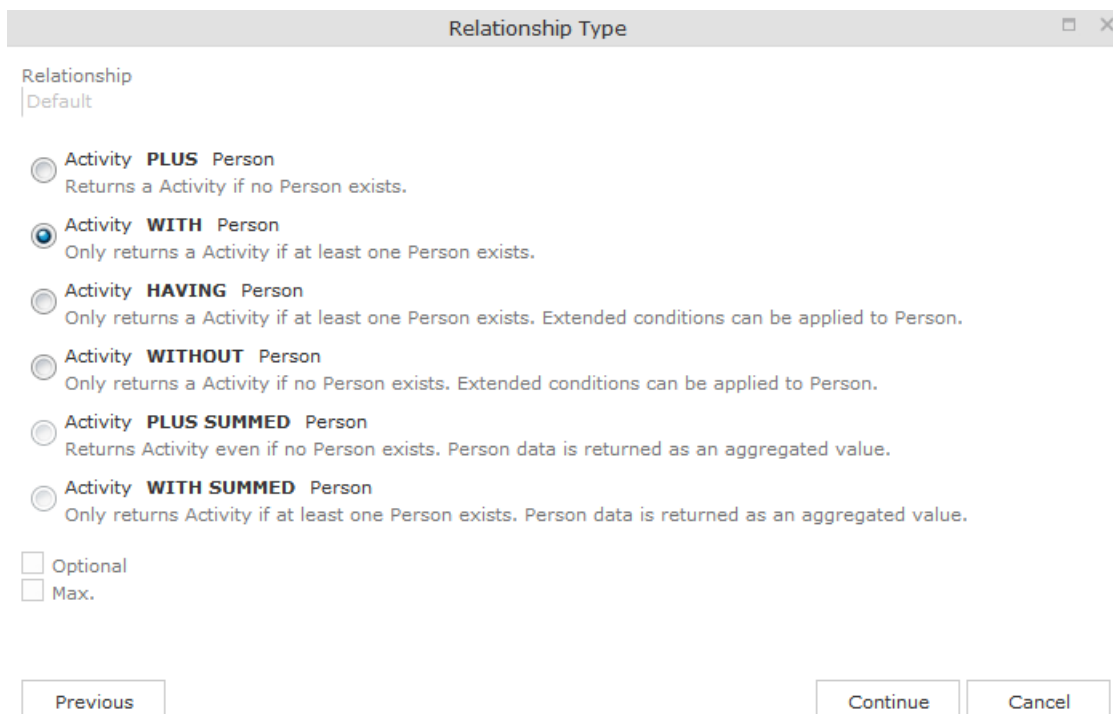
The **Quick Links** contains a list of the most frequently used info areas. Click on an info area in this list to add it without needing to search.

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

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

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

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

The **Select Fields** dialog box opens.

1. Define the output and sort fields, >> on page 48.
2. Click **Add to Query**.

You are returned to the query overview.

3. Define your conditions, >> on page 84.
4. From here, you can execute the query using the **Run** button, >> on page 81.

☰ **Activity**
 Output Fields: Type, Starts on, Ends on
 Sort by Starts on

☰ Type = "Visit"

☰ **WITH Person**
 Output Fields: Last Name, First Name, E-mail
 Sort by Last Name

☰ City = "Vienna"

Max. 100 rows

Selecting Links between Info Areas

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

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

Example:

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

Relationship Type

Relationship
 Default

Default

- 1. PE-StaNo,PE-SerNo -> PE_1_StaNo,PE_1_SerNo
- 2. PE-StaNo,PE-SerNo -> PE_2_StaNo,PE_2_SerNo
- 3. PE-StaNo,PE-SerNo -> PE_3_StaNo,PE_3_SerNo
- 126. 'KM',PE-StaNo,PE-SerNo -> Link to Info Area,Link_StaNo,Link_SerNo

Ticket **HAVING** Person
 Only returns a Ticket if at least one Person exists. Extended conditions can be applied to Person.

Ticket **WITHOUT** Person
 Only returns a Ticket if no Person exists. Extended conditions can be applied to Person.

Ticket **PLUS SUMMED** Person
 Returns Ticket even if no Person exists. Person data is returned as an aggregated value.

Ticket **WITH SUMMED** Person
 Only returns Ticket if at least one Person exists. Person data is returned as an aggregated value.

Optional
 Max.

Previous Continue Cancel

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:

```
WITH Person (3. PE-StaNo,PE-SerNo -> PE_3_StaNo,PE_3_SerNo)
Output Fields: City
```

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, >> on page 94.

Note: 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, >> on page 80.
2. Click on  to the left of **Conditions** and select **Add Condition** from the menu.

The following window opens:

1. Click on a column heading to sort the list.
2. 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.
3. Define your condition. Depending on the **Field Type**, you can define the following conditions:
 - Text field; >> on page 89.
 - Date field; >> on page 88 and on page 90.
 - Catalog field; >> on page 85 and on page 87.
 - Numeric field; >> on page 89
 - Logical (Boolean) field; >> on page 88.

- Time field; >> on page 89.
- Rep field; >> on page 89 and on page 90.

4. 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.

1. 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.
2. 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, >> on page 91. The **Text** option is also available for variable catalogs, >> on page 86.
3. 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**.
4. Double-click on an item in the right area to remove it.
5. 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.

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

Note: 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:

The screenshot shows a dialog box titled "Value(s) of Interest in the Interest Info Area". It contains the following elements:

- Instruction: "Enter a condition for the **Interest** field in the **Interest** info area. Please select the parent catalog value:"
- Text input: "Sports" (highlighted with a red box and a mouse cursor pointing to it).
- Field label: "Field **Interest**"
- Comparison operators: "= (equal)" and "<> (not equal)" (the first is selected).
- Value type: "Value:" with "Fixed" and "Field" buttons (the first is selected).
- Available Fields list: "Use as parameter (requires user input)", "no value", "Diving", "Football", "Hiking".
- Selected Fields list: "Tennis".
- Buttons: "Previous", "OK", "Cancel".

Conditions applied to child catalogs are otherwise defined the same as for all other catalogs, >> on page 85.

Conditions for Boolean Fields

To define a condition for a Boolean field:

1. Select a Boolean field.

The screenshot shows a dialog box titled "Value(s) of Recurring activity in the Activity Info Area". It contains the following elements:

- Instruction: "Enter a condition for the **Recurring activity** field in the **Activity** info area."
- Field label: "Field **Recurring activity**"
- Comparison operators: "= (equal)" and "<> (not equal)" (the first is selected).
- Value type: "Value:" with "Fixed" and "Field" buttons (the first is selected).
- Value options: "Yes" and "No" (the second is selected).
- Checkbox: "Use as parameter (requires user input)" (unchecked).
- Buttons: "Previous", "OK", "Cancel".

2. Specify the type of comparison (**equal**, **not equal**).
3. Select **Fixed** to compare the contents of the field with a fixed value from the list of entries. Select **Field** to compare the contents of a field, >> on page 91.

4. Select either **Yes**, (true) **No** (false) or **Use as parameter** as the comparison value, >> on page 94.
5. Click on **OK** to return to the query overview.

Conditions for Date Fields

To define a condition applied to a date field:

1. Select a date field.

Value(s) of Ends on in the Activity Info Area
✕

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

Field **Ends on**

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

Value:

Fixed
Variable
Field

27.11.2014

<
Nov 2014
>

W	Mon	Tue	Wed	Thu	Fri	Sat	Sun
44	27	28	29	30	31	1	2
45	3	4	5	6	7	8	9
46	10	11	12	13	14	15	16
47	17	18	19	20	21	22	23
48	24	25	26	27	28	29	30
49	1	2	3	4	5	6	7

Today: Thu 27 Nov, 2014

2. Select the type of comparison (**equal**, **not equal** etc.).
3. Date fields allow you to use fixed and variable comparison values. Use the **Fixed** option to compare the value with a specific date or to a value entered by the user (if the **Use as Parameter** option is enabled). Use the **Variable** option to enter a date relative to the date the query is executed on. Select **Field** to compare the value with the contents of another field, >> on page 90, on page 91 and on page 94.
4. Click on **OK** to return to the query overview.

Conditions for Numeric, Alphanumeric and Time Fields

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

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

Value(s) of Ends at in the Activity Info Area
✕

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

Field **Ends at**

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

Value:

Fixed
Variable
Field

13:00

Use as parameter (requires user input)

Previous
OK
Cancel

2. Define the type of comparison (**equal**, **greater** etc.).
3. Determine what to compare the contents of the field with. Choose between **Fixed**, **Variable**, **Field** (compare with the contents of another field), >> on page 90 and on page 91. 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, >> on page 94.
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, >> on page 94.

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

Note: 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.

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

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

Field **Created by ID**

Value:

Peter Parker; Chris Aki;

Use as parameter (requires user input)

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, >> on page 91. Enable the **Use as Parameter** option if you want a comparison value to be entered by the user upon starting the query, >> on page 94.

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

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

Select the rep(s), >> on page 67.

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

Elke Führer; Gudrun Peischer; Miranda Meyer

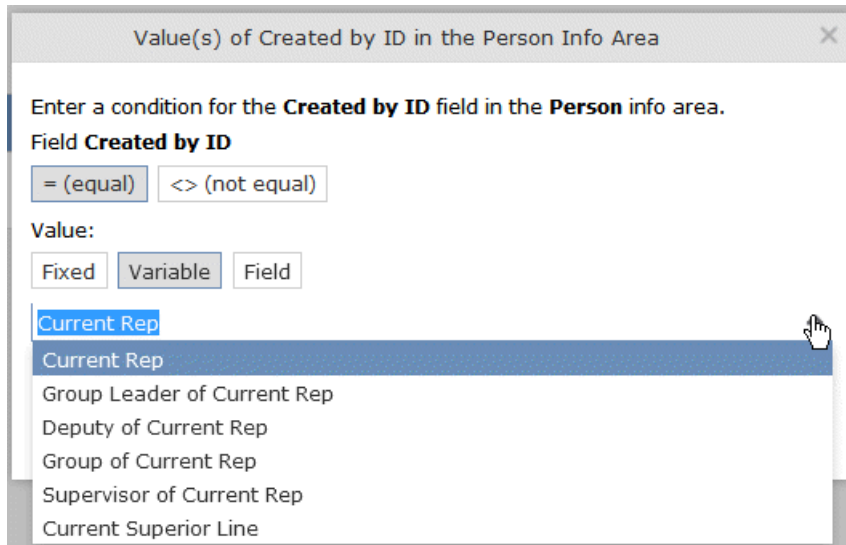
Variable Conditions

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

Variable Reps

To define a variable condition applied to rep field:

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



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

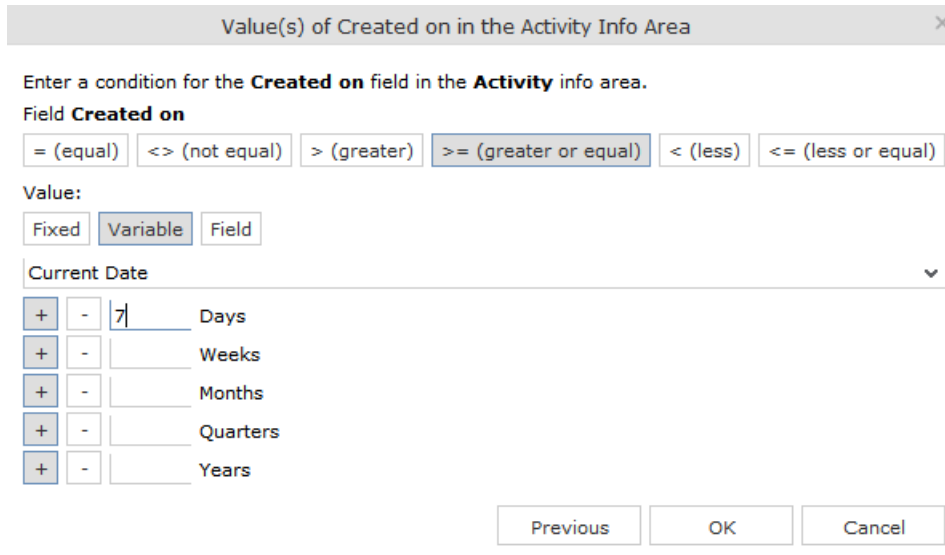
The appropriate user is used by the query as a comparison value when it is executed.

Variable Date Fields

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

To define a variable condition for a date field:

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

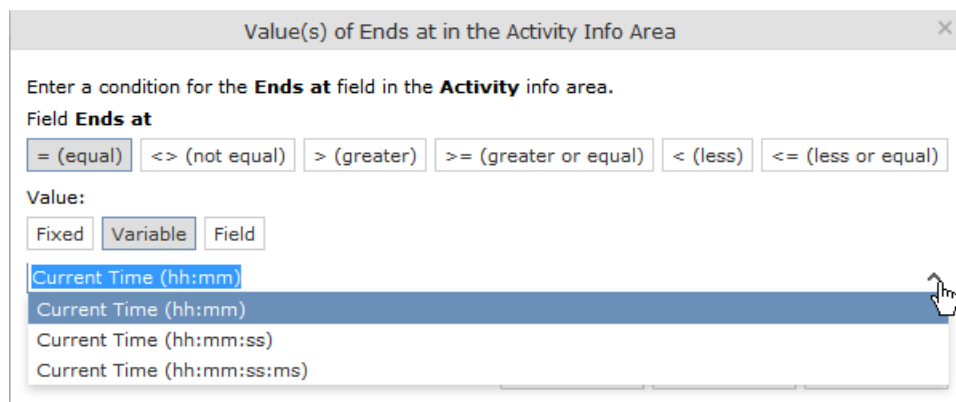


Variable Time Fields

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

To define a variable condition for a time field:

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



Comparing Field Contents

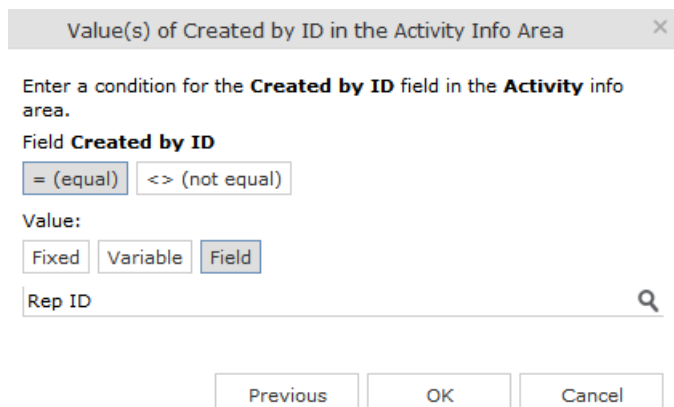
When defining conditions, you can choose to compare the value stored in fields in a record.


You can compare the following fields:

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

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

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



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

Conditions in the Overview

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

Query Visits and e-mails* ^

✓ Save ✗ Delete | 👤 Send to Reps... ➤ Run Query in Background ➤ Run Query

Query name Private query Public query

▼ UQL Syntax


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

▼ Formatted

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



Activity	
Output Fields: Type, Starts on, Rep	
	Type = ("Visit" OR "E-mail")
AND	OR
	Starts on = "12.01.2015"
	Starts on = "19.01.2015"
	Starts on = "26.01.2015"

Max. rows ➤ Run Query ➤ Run Query in Background

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:

Query Visits and e-mails*

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

Query name Visits and e-mails Private query **Public query**

UQL Syntax

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

Formatted

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

Activity		
Output Fields: Type, Starts on, Rep		
	AND	Type = ("Visit" OR "E-mail")
		OR
		Starts on = "12.01.2015"
		Starts on = "19.01.2015"
		Starts on = "26.01.2015"

Max. 100 rows Run Query Run Query in Background

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

Examples of Linked Conditions

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

Comparing the contents of one or more fields with a value

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

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

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

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

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

Activity		
Output Fields: Rep, Status, Type		
	AND	Type = "Visit"
		Status = "Completed"
		OR
		Rep = "Miranda Meyer"
		Rep = "Current Rep" (Chris Aki)

Max. 100 rows

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

CatField1 = Value1a OR Value1b OR Value1c

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

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

AND Status = 'Scheduled'

Activity
Output Fields: Rep, Status, Type

AND

- Type = ("Visit" OR "Letter" OR "E-mail")
- Status = "Scheduled"

Max. 100 rows

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

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

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

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

Activity
Output Fields: Rep, Status, Type

AND

- Type = "Visit"
- Starts on >= "19.01.2015"
- Starts on <= "23.01.2015"

Max. 100 rows

Advanced Conditions

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

Defining Advanced Conditions

To define an advanced condition:

1. Link two info areas in a query using either **HAVING** or **WITHOUT**, >> on page 78 and on page 81.

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

1. 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.

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

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

1. Click on **OK**.

The query overview is displayed.

Parameters and Predefined Queries

Most users 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, >> on page 84.

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

1. Open a query, >> on page 80.

Add Info Area
 Group AND
 Group OR

Activity
 Output Fields: Type, Starts on, Ends on

AND

- Starts on >= Parameters
- Starts on <= Parameters

Parameters

- Starts on >= 19.01.2015
- Starts on <= 23.01.2015

Max. 100 rows Run Query

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

Tips:

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

Sending a Query Definition to another Rep

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

To make a query available to another rep:

- Load a query (>> on page 80) or select a query in the list of queries.
- Click (**Send to Reps**).
A dialog box is displayed.
- Click on (**Select Rep**) to select the desired reps or groups in the **Recipient(s)** field, >> on page 28.

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



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

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

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

Saving, Loading and Exporting Query Results

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 workaround in this case is to modify the query statement as explained below:

UQL:

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

SQL

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

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

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

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

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

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

Quick Query (Enterprise CRM)

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

Quick Queries are designed to:

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

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

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

Understanding Quick Queries

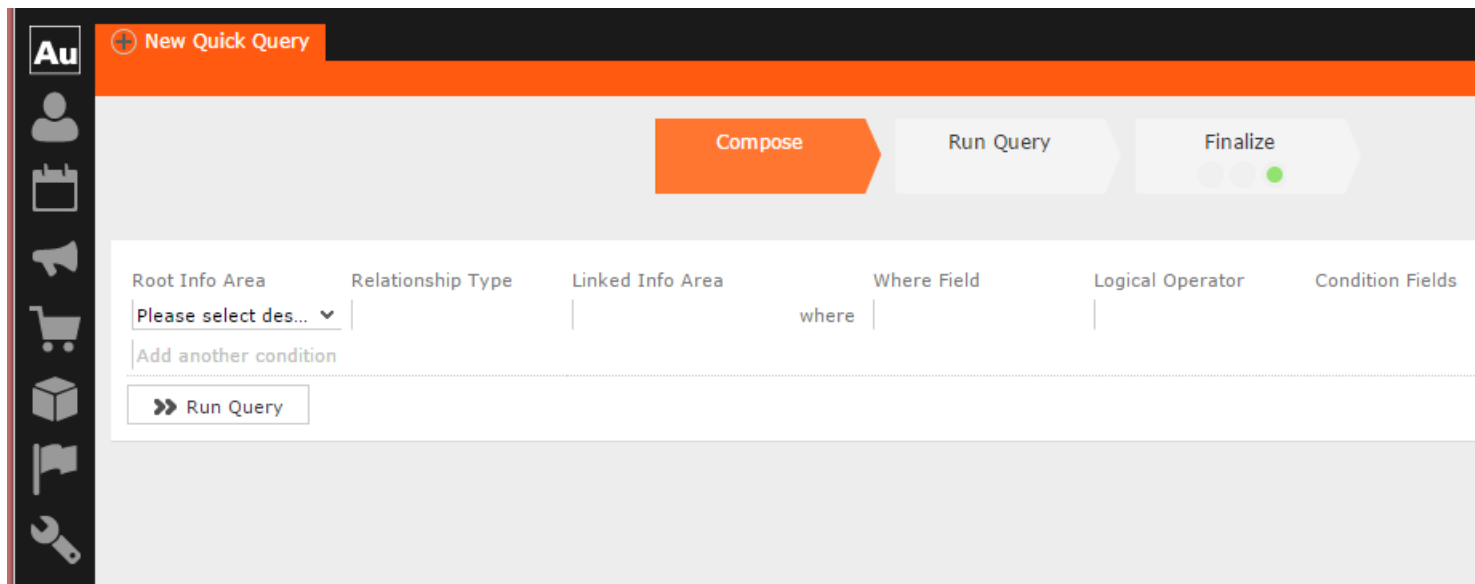
Aurea CRM allows customers with enterprise versions to allow their users to create Quick Queries. Users can then share their queries with others or save them as private queries. Searching for a quick query is similar to searching for the standard queries as explained in the previous chapter Queries.

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

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

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

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



Note: 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 to save the query and define the rights restrictions on the query. You can make it a public query and make it available to other users. As a private query it is available only to you.

Creating a Quick Query

To create a quick query, perform the following steps:

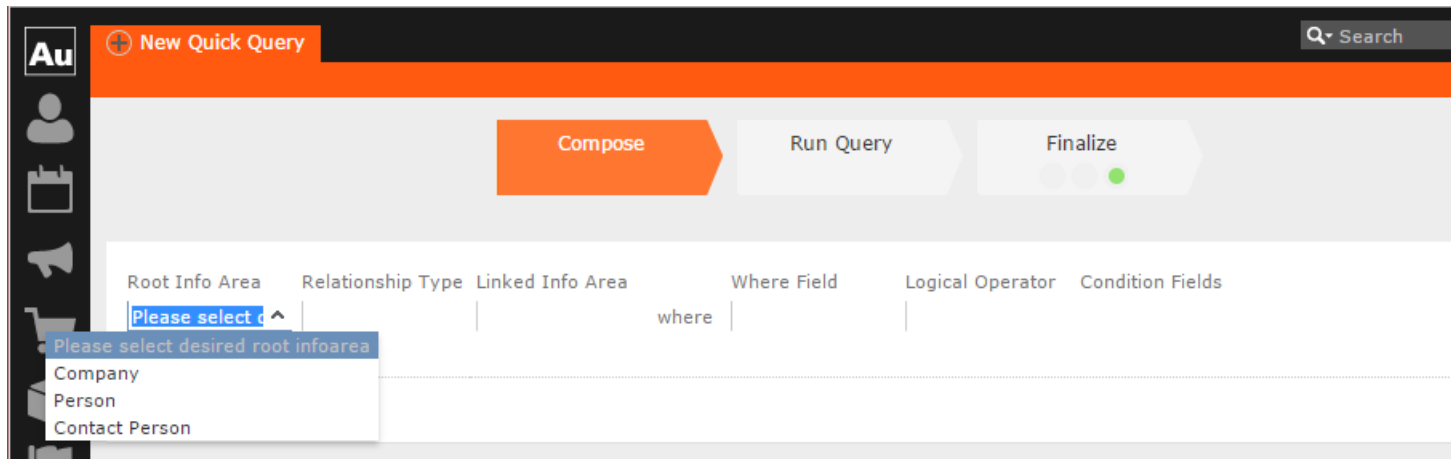
1. From the **Queries and Analysis** menu select **Queries**. The Queries window displays.

The screenshot shows the 'Queries' window in the CRM system. The window has a top navigation bar with the 'Au' logo and a 'Queries' tab. Below the navigation bar, there is a header section with the title 'Queries' and several action buttons: '+ New Query', '+ New Quick Query', 'X Delete', '+ Send to Reps...', '» Run Query', and a gear icon for 'Settings'. There are also input fields for 'Query Name', 'User', and 'Private' (with a question mark icon). To the right, there are date pickers for 'Created since' and 'Changed since', both set to 'DD.MM.YYYY'. Below the header, there is a dropdown menu for 'Max. 15 records per page'. The main content area displays a table of queries with the following columns: 'Query Name', 'New', and 'Update'. The table contains the following data:

Query Name	New	Update
» A new test query	15.01.2016 13:04	15.01.2016 13:04
» A public query for me	15.01.2016 13:06	
» Another test query	15.01.2016 22:40	
» company_with_rep	20.01.2016 16:49	
» CompanyTest	03.02.2016 00:47	
» CRM-3339-Query	19.01.2016 10:12	
» k123	19.01.2016 13:31	
» KiranPublicQuery	19.01.2016 06:46	
» KiranPublicQuickQuery	19.01.2016 06:51	
» Manuels QuickQuery	19.01.2016 08:30	19.01.2016 08:30
» Manuels working QuickQuery	19.01.2016 13:43	
» MyFI	06.11.2015 14:17	

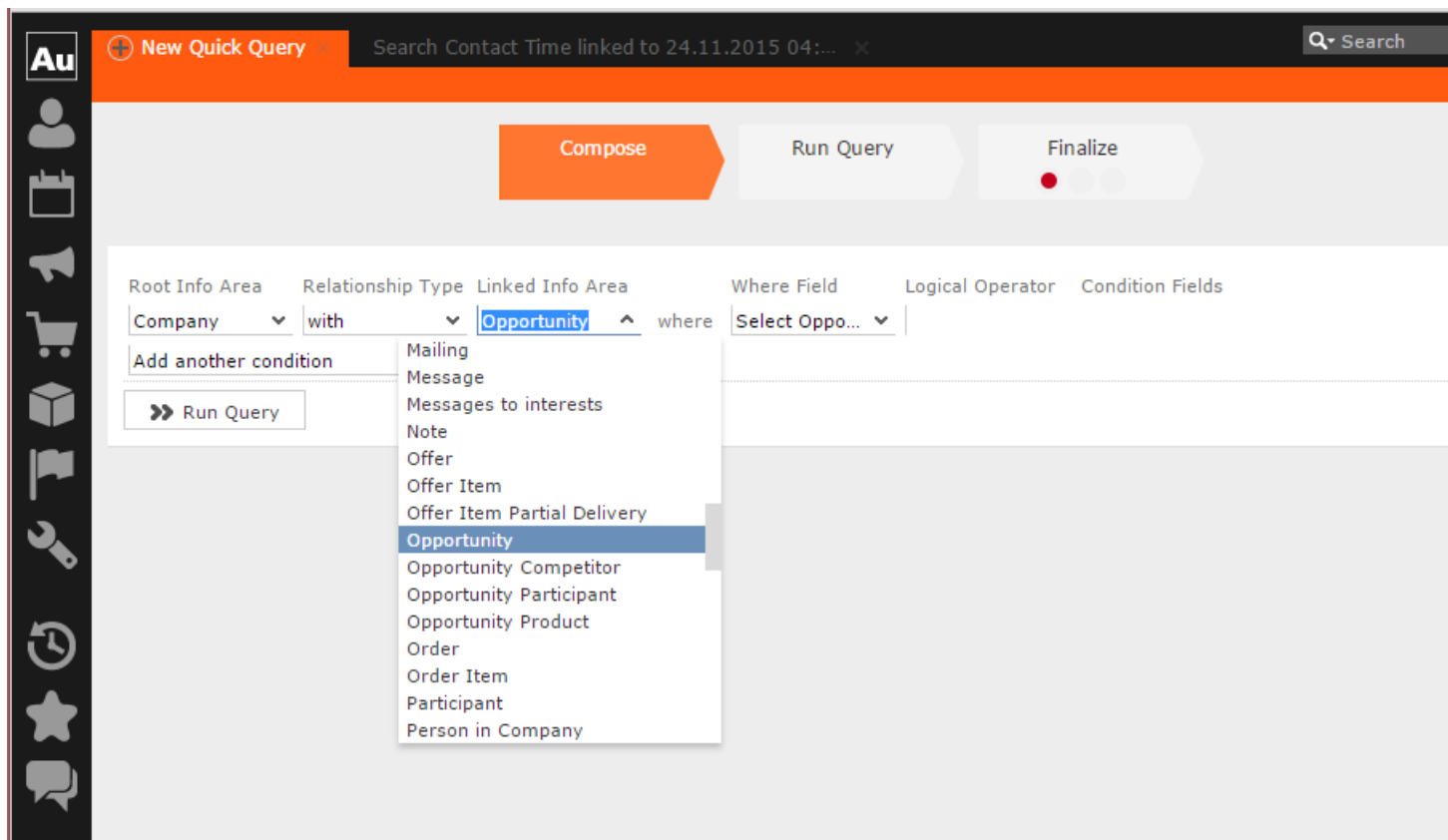
Note: Note: The list of queries displayed contains both Quick Queries and standard queries. The Quick Queries in the Queries list are tagged with the » icon.

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.



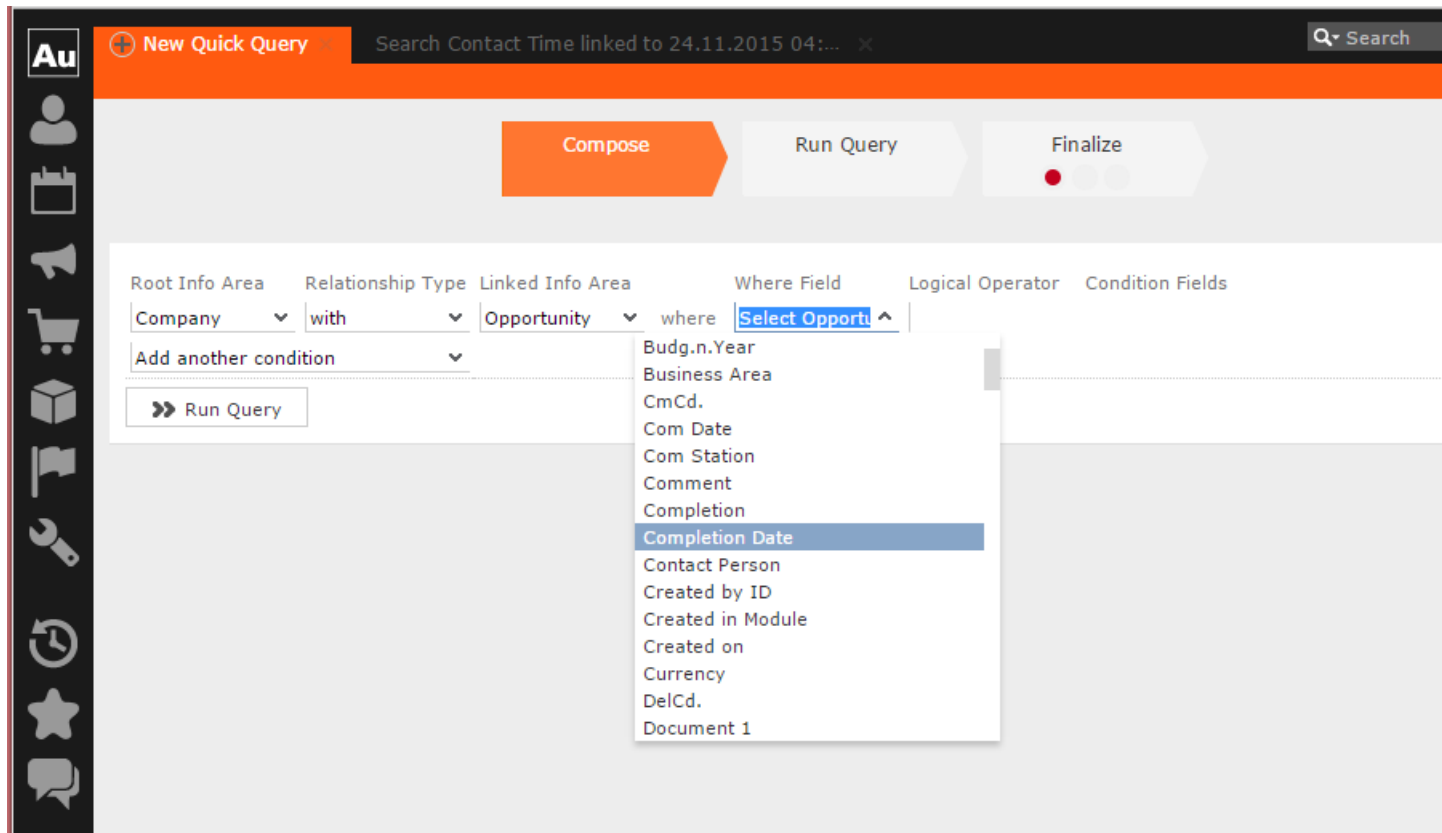
4. Select the **Relationship Type** from the drop down list for the linked info area.

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: 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.

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

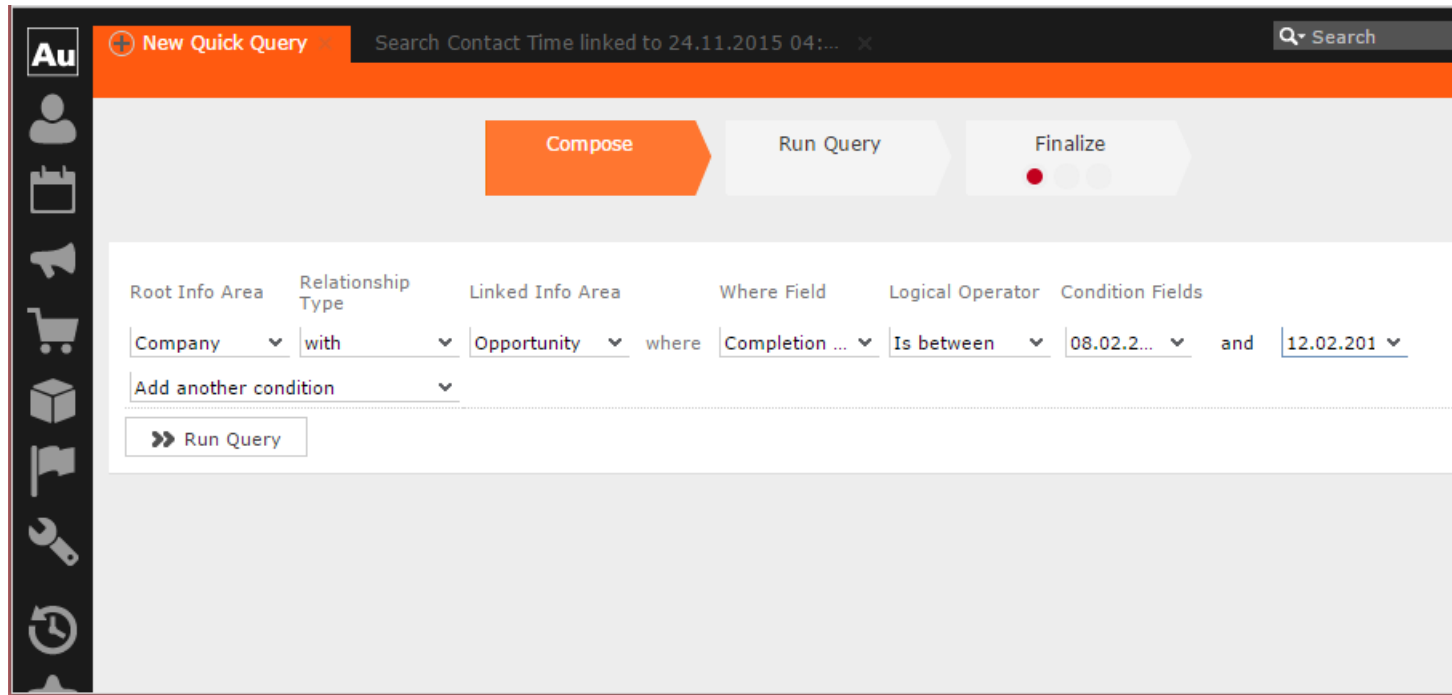
- Scroll down and select the required info area field from the **Where Field** drop down list.

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

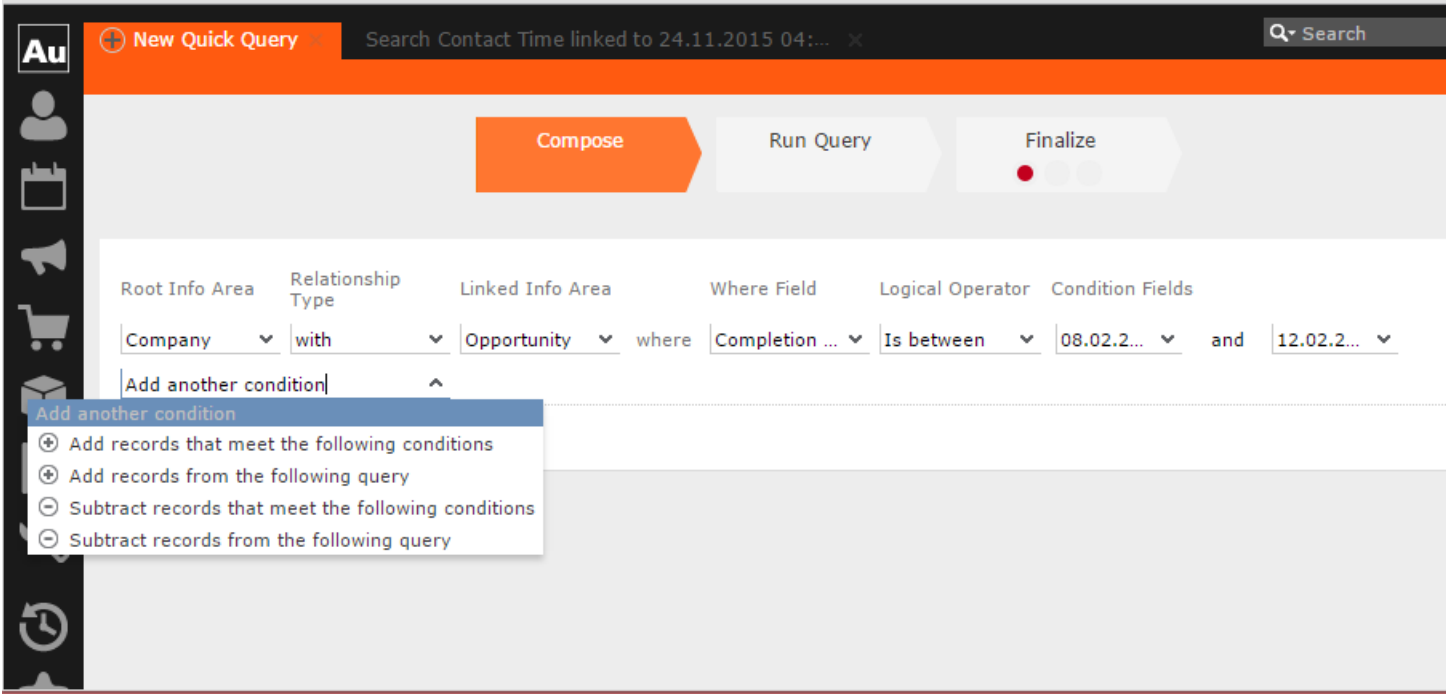
- Select the applicable **Logical Operator** from the drop down list. You have the following options: Equals (=); Not equals; Is empty; Is not empty; Is true; Is not true; Is smaller than; Is greater than; Is between; Is current date.

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

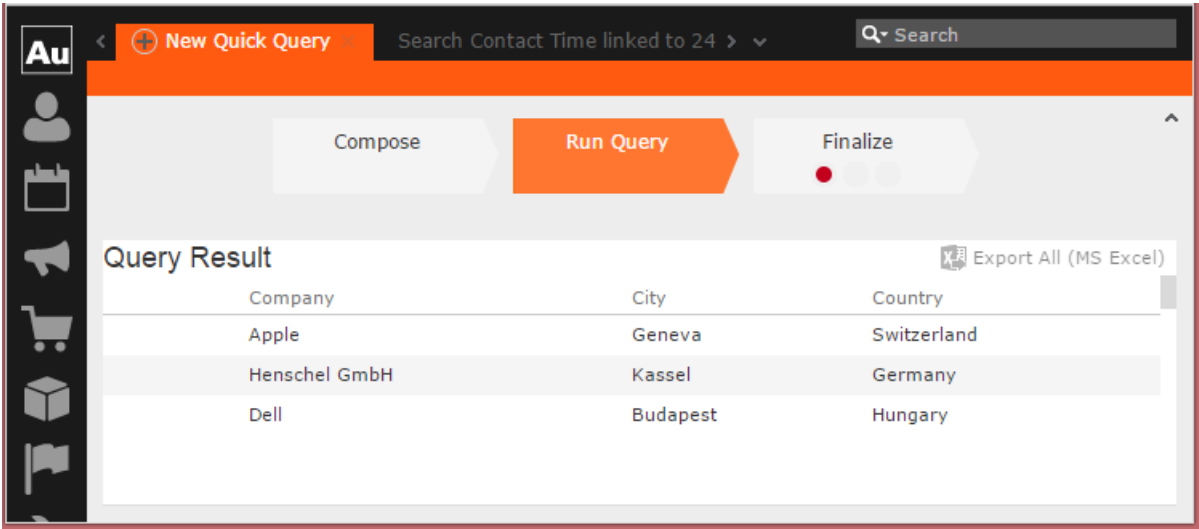
The Condition Fields column activates and the drop down list is populated with the available values. In this case it displays the available country names. In this example screenshot, the **Logical Operator** Is between is selected and in the **Condition Fields** the start and end dates between which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



8. To Add Another Condition, select one of the following from the drop down list:
- Add records that meet the following conditions
 - Add records from the following query
 - Subtract records that meet the following conditions
 - Subtract records from the following query



9. Click Run Query to test the results.

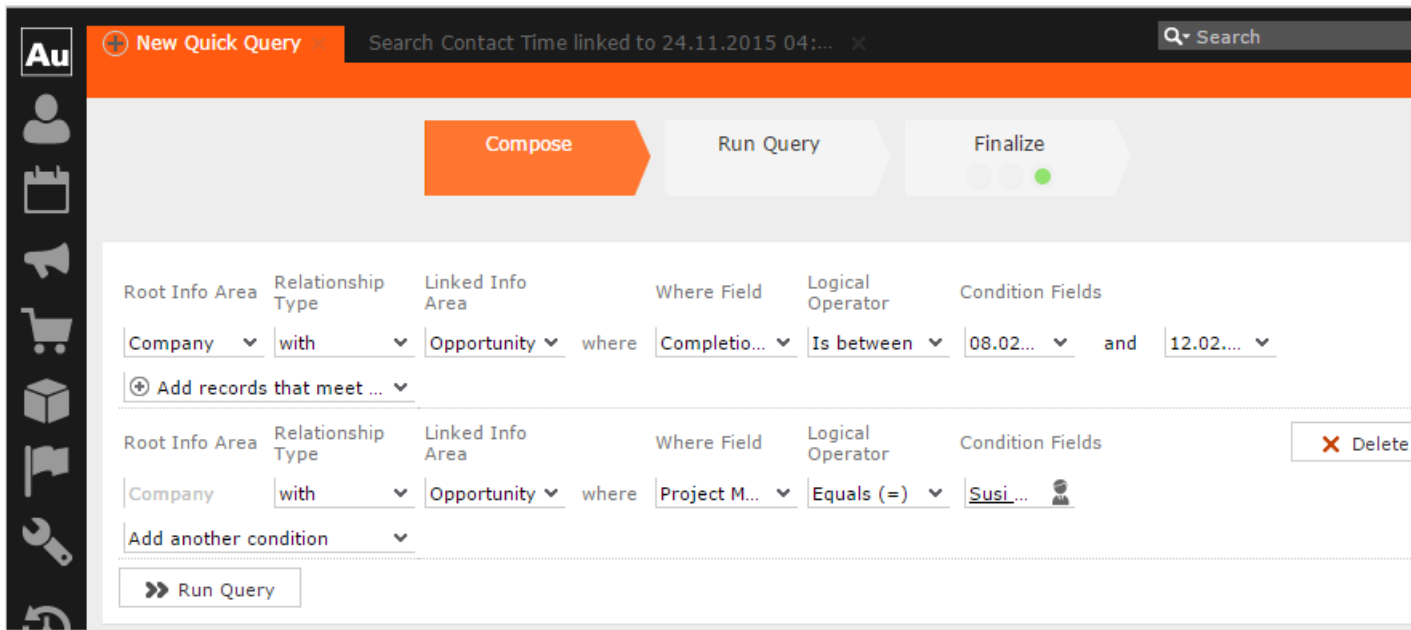


10. Depending on your choice, perform the following sub-steps.

Note: 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.

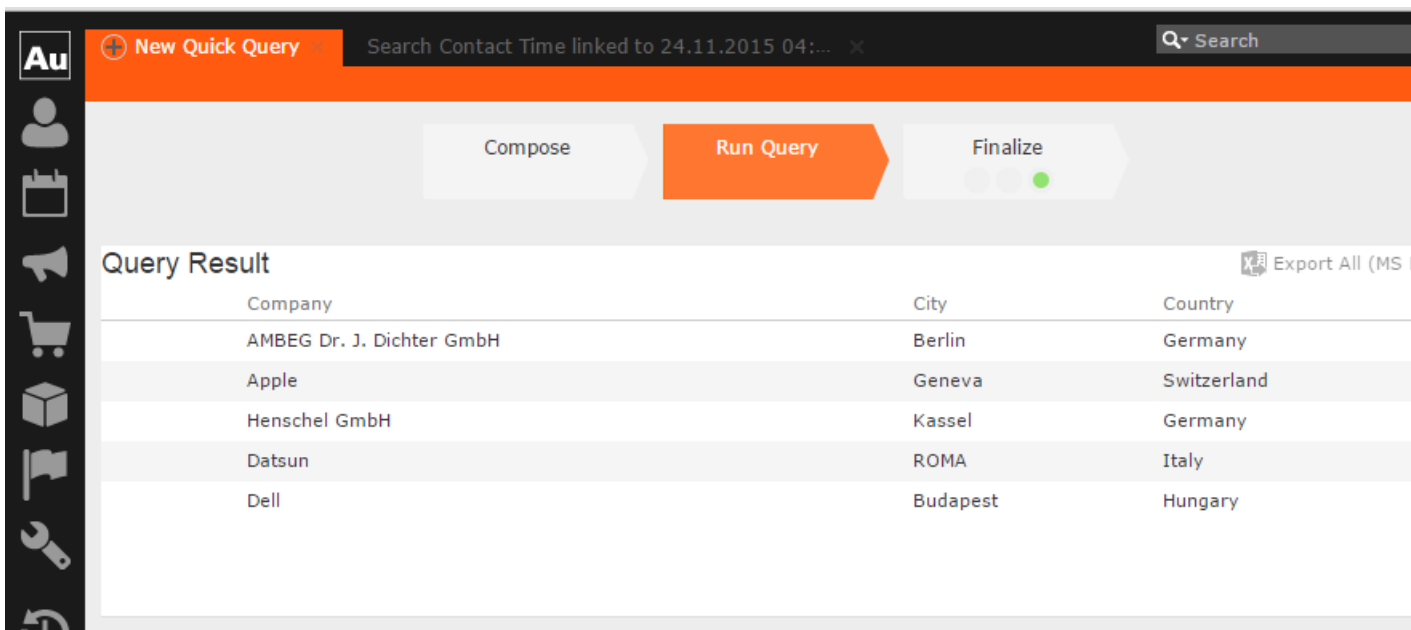
- a. For the options to **Add records that meet the following conditions** or **Subtract records that meet the following conditions**, repeat the instructions in steps 3 to 7 above. The example screenshot shows the **Add records that meet the**

following conditions. Companies with Opportunities and Where the Project Manager is a specific person.



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

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

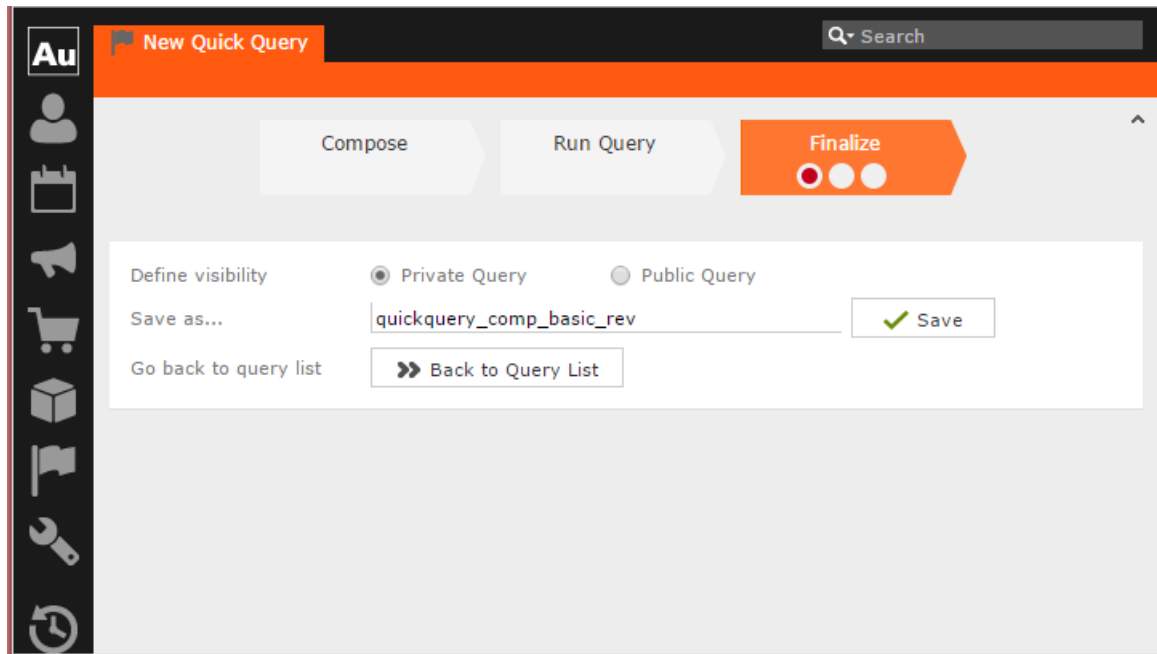
Select **Subtract records from the following query**.

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

To **Add a record from the following query** type the name of the query in the search box.

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

Note: 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: 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.

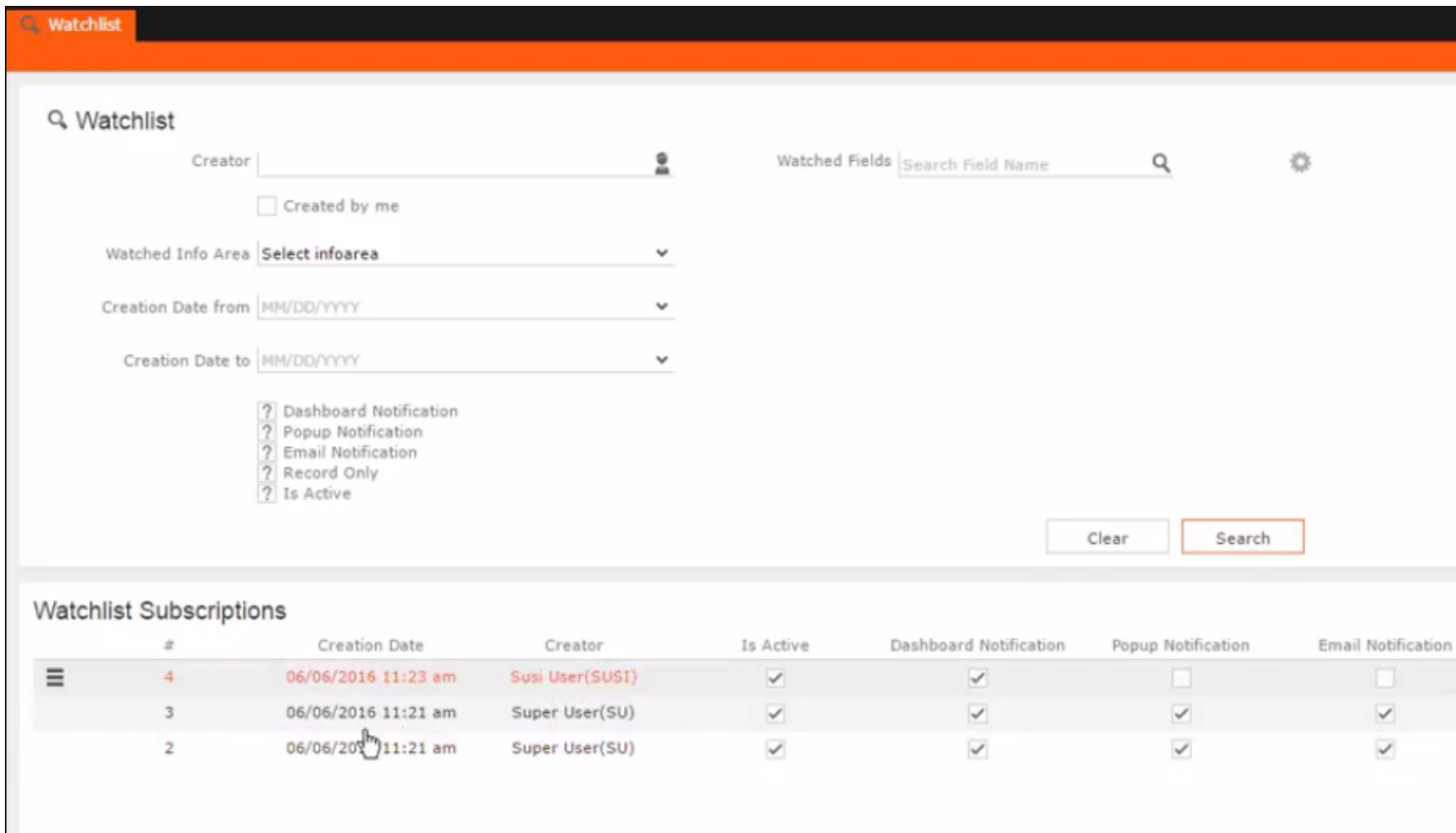
To enable change notifications service on an infoarea, request your CRM system administrator to add the watchlist menu to the infoarea's context menu.

Note: Note: Change Notification Service is an enterprise feature.

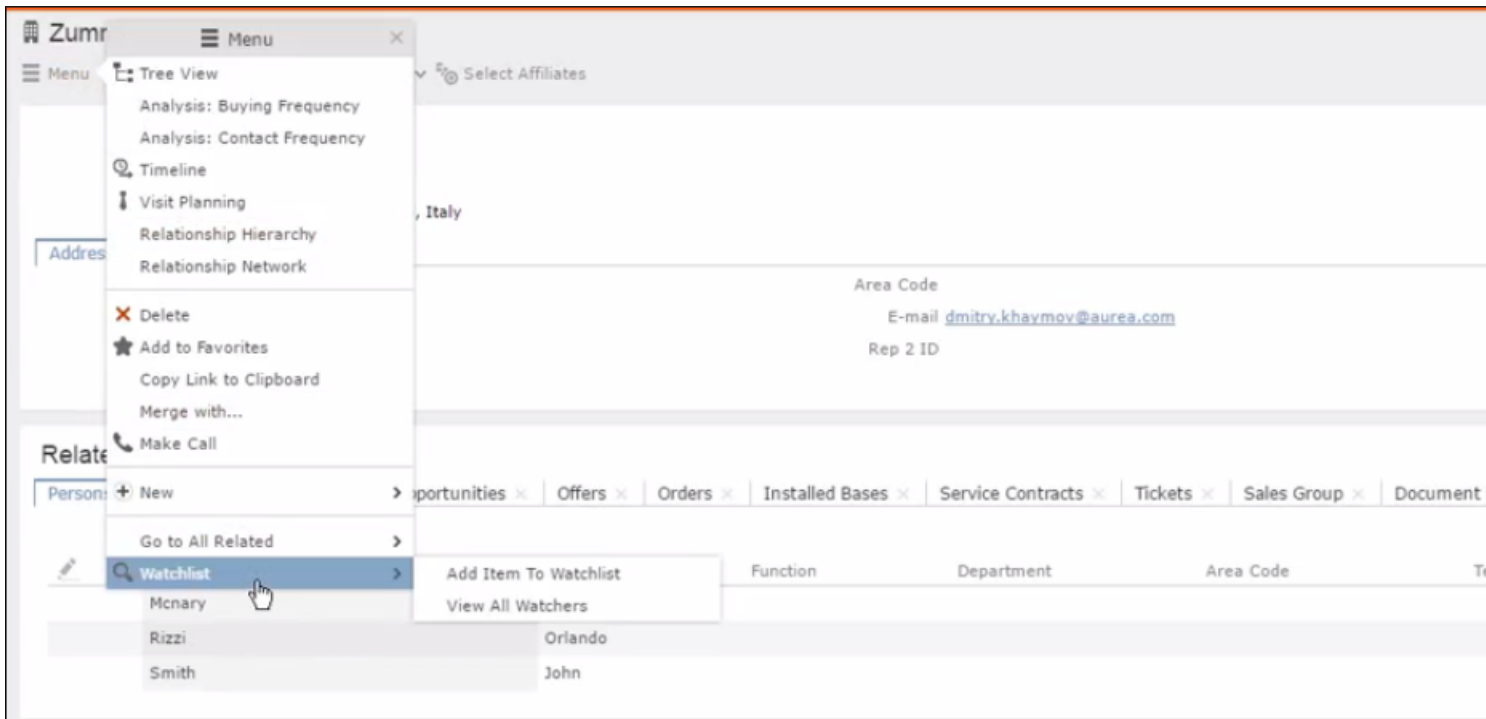
Overview of Watchlists and Notifications

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:

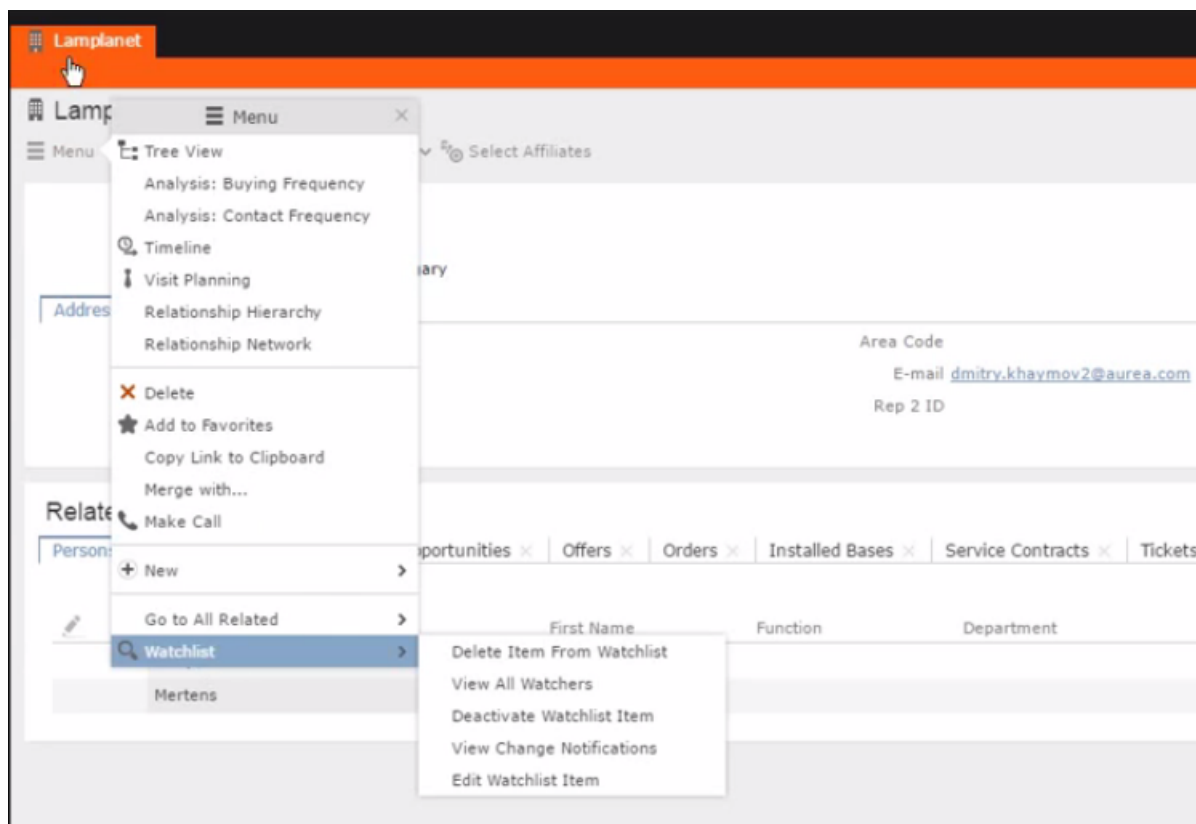


For a given record or infoarea the Watchlist context menu initially allows you to add a Watchlist item. For example, the screenshot below shows the **Add Item to Watchlist** and **View all Watchers** sub-menu items for the Company infoarea.



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 screenshot shows the Aurea CRM Start Page. At the top, there is a 'Start Page' button. Below it, the user is greeted with 'Welcome to Aurea CRM, Super User'. The page is divided into several sections:

- Recent notifications:** Shows 2 notifications. One notification is visible: 'Zummatechi changed by Super User at 06/05/2016 15'.
- Today's notifications:** Shows 2 notifications. One notification is visible: 'Lamplanet changed by Super User at'.
- Quick Start:** Contains buttons for 'Companies', 'Persons in Company', 'Calendar', and 'Queries'.
- My Week:** A calendar view for the week of Mon 05/30/2016 to Fri 06/03/2016, with time slots from 8:00 AM to 9:00 AM.
- Sales Radar:** A section with a 'Category "Level"' and values 0.1 and 0.1.

- The following screenshot shows a popup change notification:

The screenshot shows a 'Change Notification Details' popup window. It contains the following information:

- Change Notification Details:**
 - Changed Item: Person in Company-Mr. Dmitry Khaymov
 - Author: Super User - SU (10000002)
 - Date of Change: 2016/06/2005 12:00 am
 - Is Read:
- Changed Fields:**

Field Id	Field Name	Field Type	Updated Value
22	Street	Character	wrrerw
20	ZipCode	Character	
19	Country	Catalog	4
6	Tel1	Character	7474747474

At the bottom of the popup, there are two buttons: 'Mark As Read' and 'Close'.

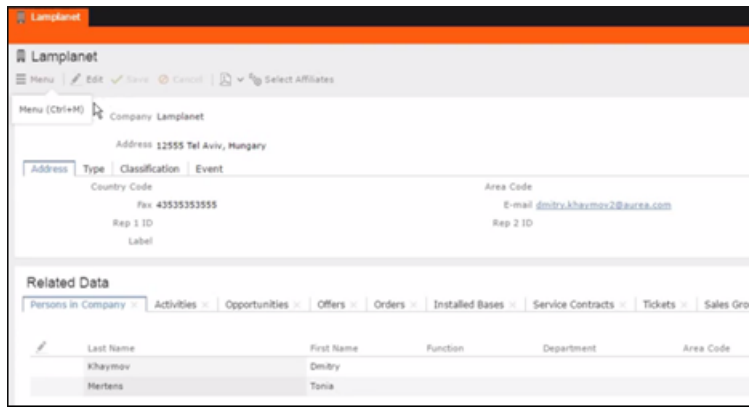
- The remaining sections describe the various tasks required to create and work with Watchlist items.

Adding items to the Watchlist

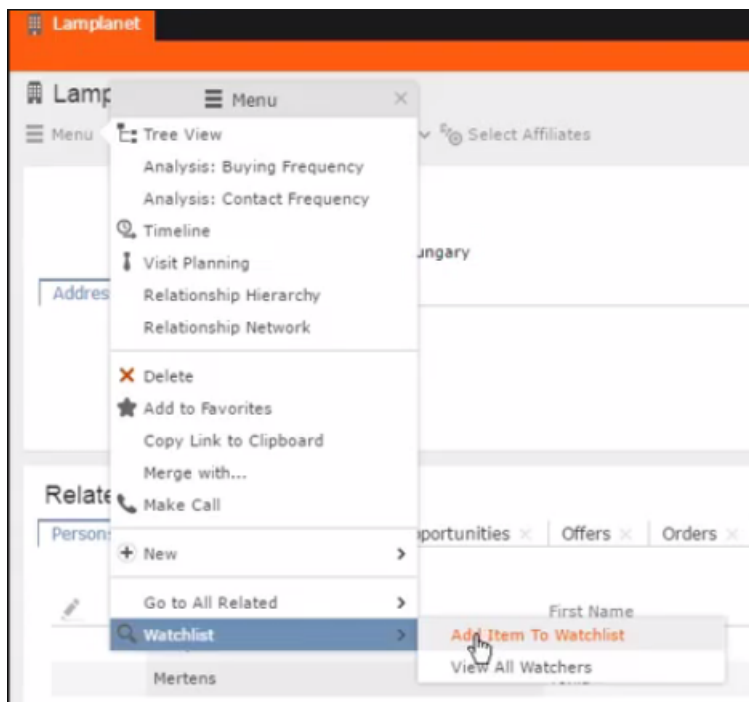
To add items to a watch list perform the following steps:

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

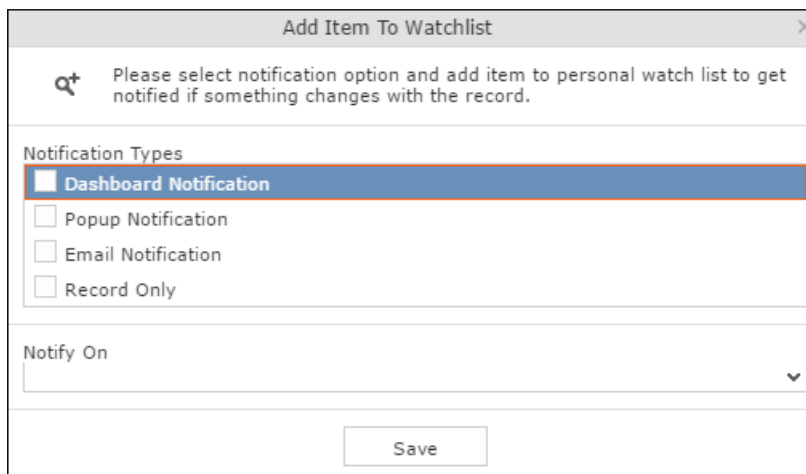
The record window displays. For example, the following screenshot shows the **Lamplanet** Company record infoarea.



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



The **Add Item to Watchlist** window displays.



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

3. Specify the notification types and notification even as described below:

- Click on the checkbox to select one or more **Notification Types** from the following list:
 - **Dashboard Notification**—Change notifications is displayed on the dashboard. Two widgets for recent changes and today's changes are displayed. They also display the number of change notifications.
 - **Popup Notification**—Change notification pops ups when you login, displaying the change details.
 - **Email Notification**—Change notification is sent by email.
 - **Record Only**—Change notification is persisted in the database, but no popup, email, or dashboard notifications are displayed. You can view the change notifications from the watchlist context menu of the watched record.

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

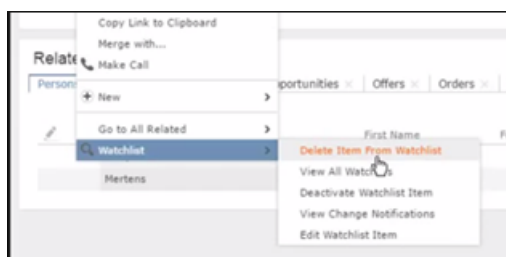
- **Every change**—you are notified when any of the record's field is modified.
- **Change on Specific Fields**—you are notified when the fields of interest in a record are changed.

To specify the field of interest perform the following steps:

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

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

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

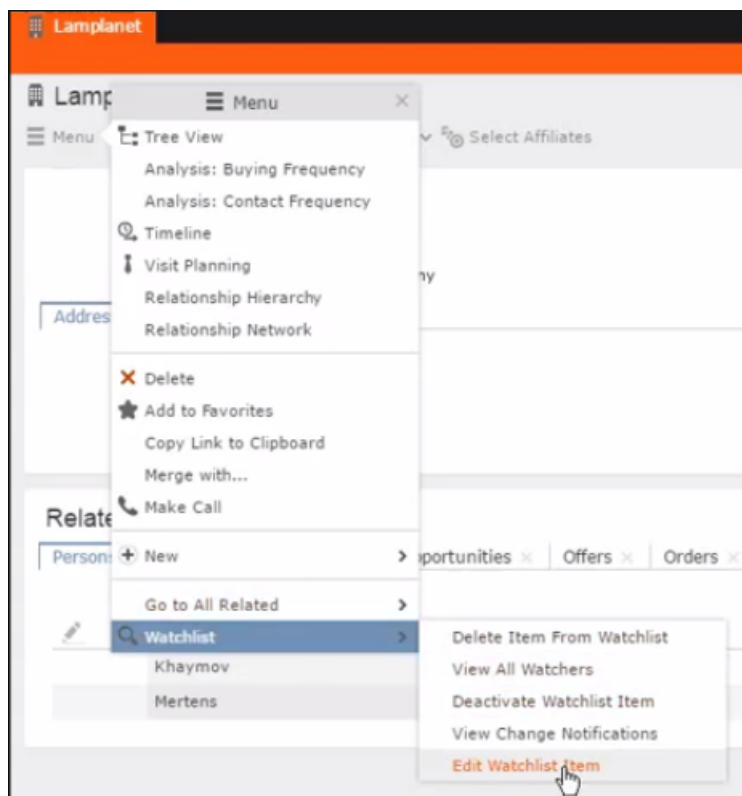


Editing Watchlist Item

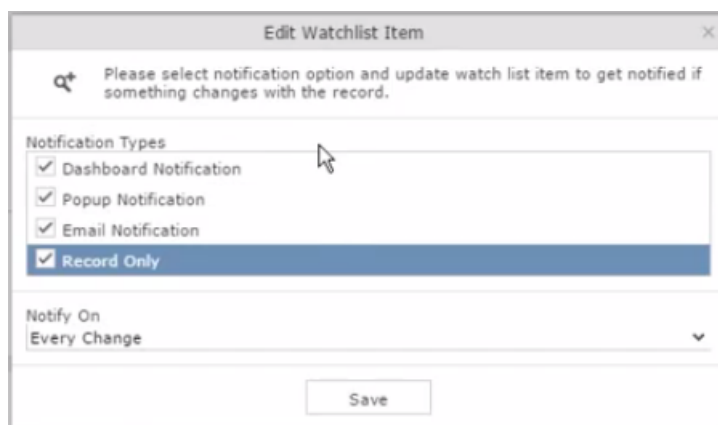
You can edit an existing watchlist item on a record and change the notification types and event details that generate the notifications.

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

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

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

To specify the field of interest perform the following steps:

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

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

1. Click **Save**.

The changes are saved to the watchlist item.

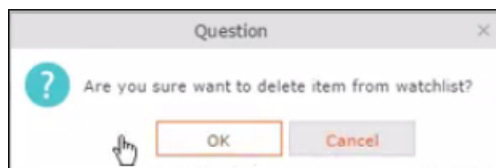
Deleting an Item from the Watchlist

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

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

1. Open the record to which you have added the watchlist item.
2. Select **Menu > Watchlist > Delete Item from Watchlist**.

A confirmation window displays.



3. Click **OK**.

The item is removed from the watch list.

View all Watchers of a Watchlist item

To view all watchers subscribed to a watchlist item:

1. Open the record to which containing the watchlist item.
2. Select **Menu > Watchlist > View all Watchers**.

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

#	Creator	Create Date	Is Active	Notify On	Dashboard...	Popup Noti...	Email Notif...	Record Only	Specific Fie..
1	Super User	06/16/201...	<input checked="" type="checkbox"/>	Every Cha...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
21	Susi User	06/18/201...	<input checked="" type="checkbox"/>	Every Cha...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Activate/Deactivate watchlist subscription item

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

Activate/Deactivate from watchlist subscription search page

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

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

The Watchlist Subscription Search page displays.

Search filters on the Watchlist Subscription Search page:

- Creator: [Text Input]
- Created by me:
- Watched Fields: [Search Field Name]
- Watched Info Area: Select infoarea
- Creation Date from: MM/DD/YYYY
- Creation Date to: MM/DD/YYYY
- Notification options:
 - Dashboard Notification
 - Popup Notification
 - Email Notification
 - Record Only
 - Is Active

Buttons: Clear, Search

Message: There is no found watchlist subscriptions.

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

The search results displays.

Watchlist Subscriptions							
#	Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	Email Notification	
11	06/16/2016 02:35 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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

3. To deactivate an active watchlist item:

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

The **Actions** menu displays.

Watchlist Subscriptions							
#	Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	Email Notification	
11	06/16/2016 02:35 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> ≡ Actions Deactivate Watchlist Item Delete Watchlist Item Edit Watchlist Item
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

b. Select **Deactivate Watchlist Item**.

The watchlist item is marked as inactive.

Watchlist Subscriptions					
#	Creation Date	Creator	Is Active	Dashboard Notification	
11	06/16/2016 02:35 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

4. To activate a watchlist item:

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

The **Actions** menu displays.

Watchlist Subscriptions					
#	Creation Date	Creator	Is Active	Dashboard Notification	
11	06/16/2016 02:35 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> ≡ Actions Activate Watchlist Item Delete Watchlist Item Edit Watchlist Item
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

b. Select **Activate Watchlist item**.

The watchlist item is marked as active.

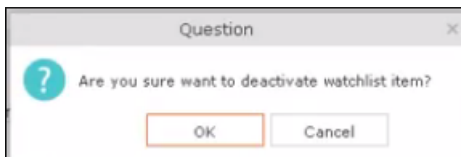
Watchlist Subscriptions				
#	Creation Date	Creator	Is Active	Dashboard Notification
11	06/16/2016 02:35 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Activate/Deactivate from record's context menu

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

1. Search corresponding infoarea and open the required record.
2. To deactivate the watchlist item:
 - a. Select **Menu > Watchlist > Deactivate Watchlist** item.

A confirmation window displays.

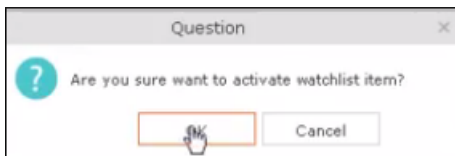


- b. Click **OK**.

The watchlist item is deactivated.

3. To activate the watchlist item:
 - a. Select **Menu > Watchlist > Deactivate Watchlist** item.

A confirmation window displays.



- b. Click **OK**.

The watchlist item is activated.

Search watchlist subscriptions

To search the watchlist subscriptions, perform the following steps:

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

The Watchlist Subscription Search page displays.

Watchlist

Watchlist

Creator

Created by me

Watched Info Area **Person in Company** ▼

Creation Date from ▼

Creation Date to ▼

- Dashboard Notification
- Popup Notification
- Email Notification
- Record Only
- Is Active

Watched Fields

No.	Field Name	Field Type
21	City	Text
99	Home Office City	Text

Clear Save

2. Select the search filters from the following list:

- **Creator** —Filter watchlist subscriptions created by the specified subscriber.
Only one person can be selected. If select the **Created by me** filter, the search is restricted to watchlist items created by you.
- **Watched Info Area**—Filter watchlist subscriptions on records from the selected infoarea. The **Selected Fields** filter is activated and populated with selected fields to be watched when the watch list was created.
- **Selected Fields**—Specify the selected fields to be watched when the watch list was created.

Note: 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.

- Dashboard Notification
- Popup Notification
- Email Notification
- Record Only
- Is Read

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

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

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

To select an item perform the following:

- To activate a filter item, click .

The icon changes to a checkbox()

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

- Click Search.

The search result is displayed in the bottom pane.

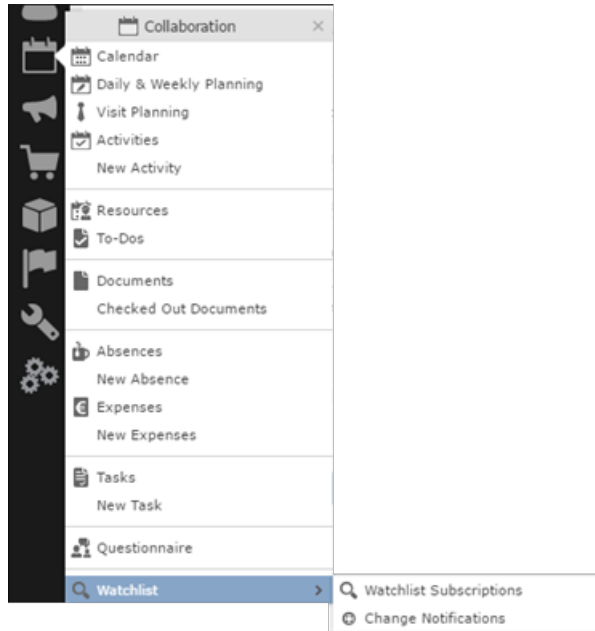
Watchlist Subscriptions							
#	Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	Email Notification	
11	06/16/2016 02:35 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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.

Change Notifications
Q

Change Notifications

Author

Changed Infoarea

Date of Change from

Date of Change to

- Dashboard Notification
- Popup Notification
- Email Notification
- Record Only
- Is Read

Changed Fields

Change Notifications

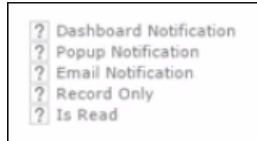
#	Date of Change	Author	Is Read	Dashboard No...	Popup Notifica...	Email Notificat...	Record Only	Change
6	06/16/2016 03...	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mr. Carle
5	06/16/2016 03...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamp
4	06/16/2016 02...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zumm
3	06/16/2016 02...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zumm
2	06/16/2016 02...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamp
1	06/16/2016 02...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zumm

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: 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: 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.

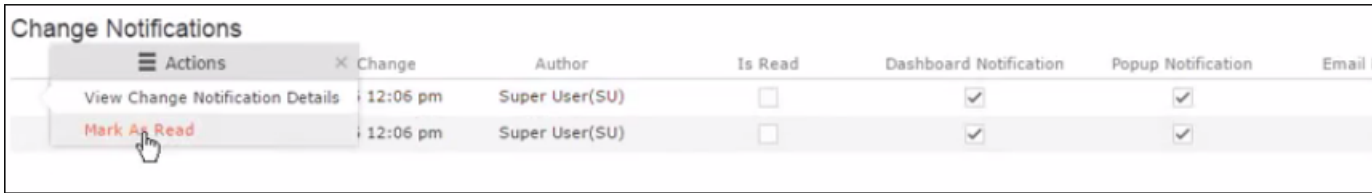
The search result is displayed.

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**.



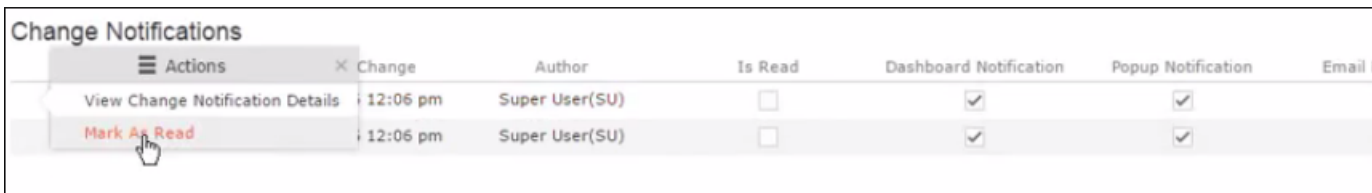
A check mark appears in the **Is Read** column for the notification.



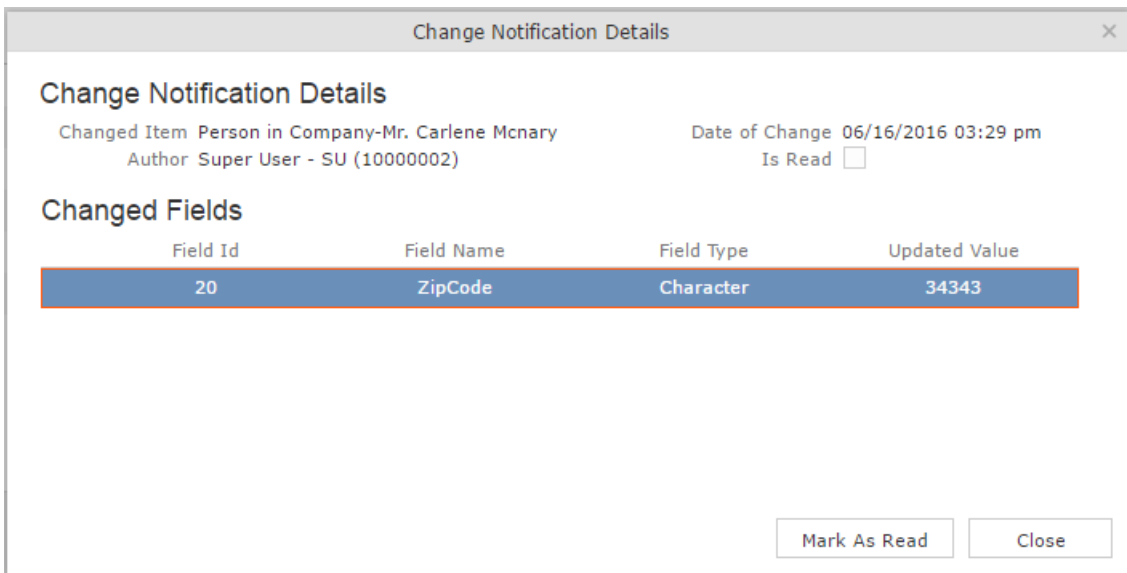
b. Viewing the change notification details.

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.

Changed Fields

No.	Field Name	Field Type
4202	(Created on)internal...	Numeric
4206	(Updated on)interna...	Numeric
35	ABC	Text
165	Accommodation Cos...	Numeric
176	Accommodation Cos...	Decoded
191	Active since	Date

Change Notifications

#	Date of Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification
2	06/06/2016 12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1	06/06/2016 12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

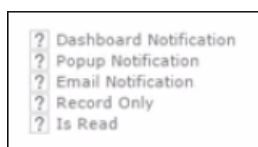
Note: Note: The Changed Infoarea field is locked to the record for which you are searching for notifications. This field cannot be changed because this function was called from the record's watchlist menu.

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

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

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

To select an item perform the following:

- To activate a filter item, click .

The icon changes to a checkbox().

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

5. Click Search.

The search result is displayed.

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

a. Marking the notification item as read.

To mark the item as read:

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

The screenshot shows a table titled "Change Notifications" with columns: #, Change, Author, Is Read, Dashboard Notification, Popup Notification, and Email. Two rows are visible. The first row has a checkmark in the "Is Read" column. The second row has an empty checkbox. An "Actions" context menu is open over the second row, with "Mark As Read" selected. A mouse cursor is pointing at the "Mark As Read" option.

#	Change	Author	Is Read	Dashboard Notification	Popup Notification	Email
	12:06 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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

The screenshot shows the same table as before, but now the "Is Read" column for the second row (ID 1) has a checkmark. The "Actions" context menu is still open over the second row, and a mouse cursor is pointing at the "Mark As Read" option.

#	Date of Change	Author	Is Read	Dashboard Notification	Popup Notification	Email
2	06/06/2016 12:06 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1	06/06/2016 12:06 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

b. Viewing the change notification details.

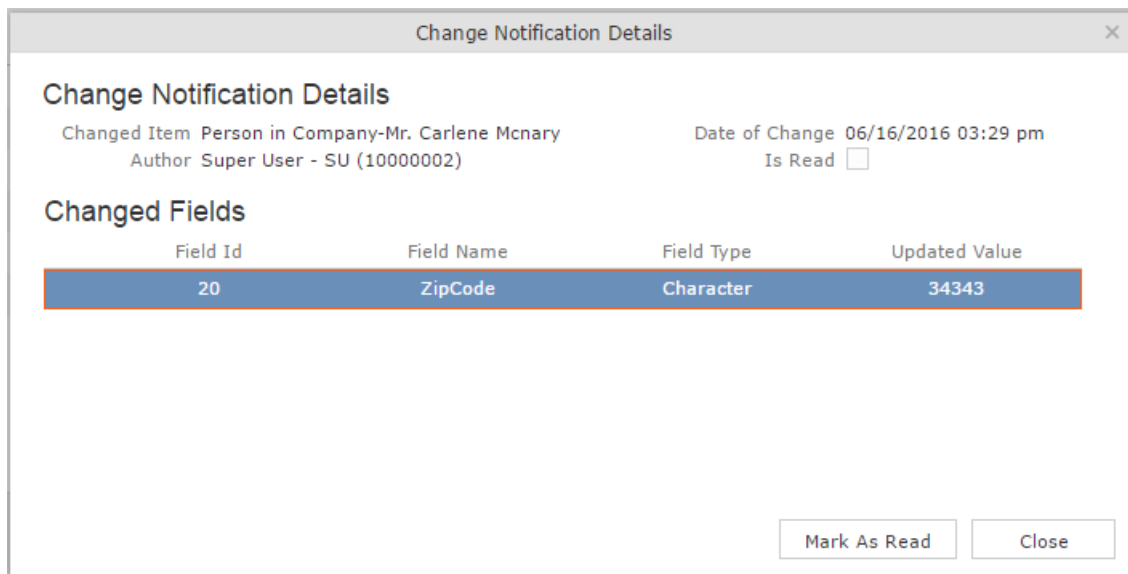
To view the details of a change notification:

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

The screenshot shows the same table as before. The "Is Read" column for the second row (ID 1) now has a checkmark. The "Actions" context menu is open over the second row, with "View Change Notification Details" selected. A mouse cursor is pointing at the "View Change Notification Details" option.

#	Change	Author	Is Read	Dashboard Notification	Popup Notification	Email
	12:06 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	12:06 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

- 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.

Aurea
Welcome to Aurea CRM, Super User

Recent notifications
2 Recent notifications
Zummatechi changed by Super User at 06/16/2016 14:48

Today's notifications
2 Today's notifications
Zummatechi changed by Super User at 06/16/2016 14:48

Quick Start
Companies Persons in Company Calen

My Week
Mon 06/13/2016 Tue 06/14/2016 Wed 06/15/2016

8:00 AM
9:00 AM
10:00 AM
11:00 AM
12:00 PM
1:00 PM

Change Notification Details

Changed Item Company-Zummatechi
Author Super User - SU (10000002)

Date of Change 06/16/2016 02:48 pm
Is Read

Changed Fields

Field Id	Field Name	Field Type	Updated Value
7	ZipCode	Character	4556

Mark As Read Close

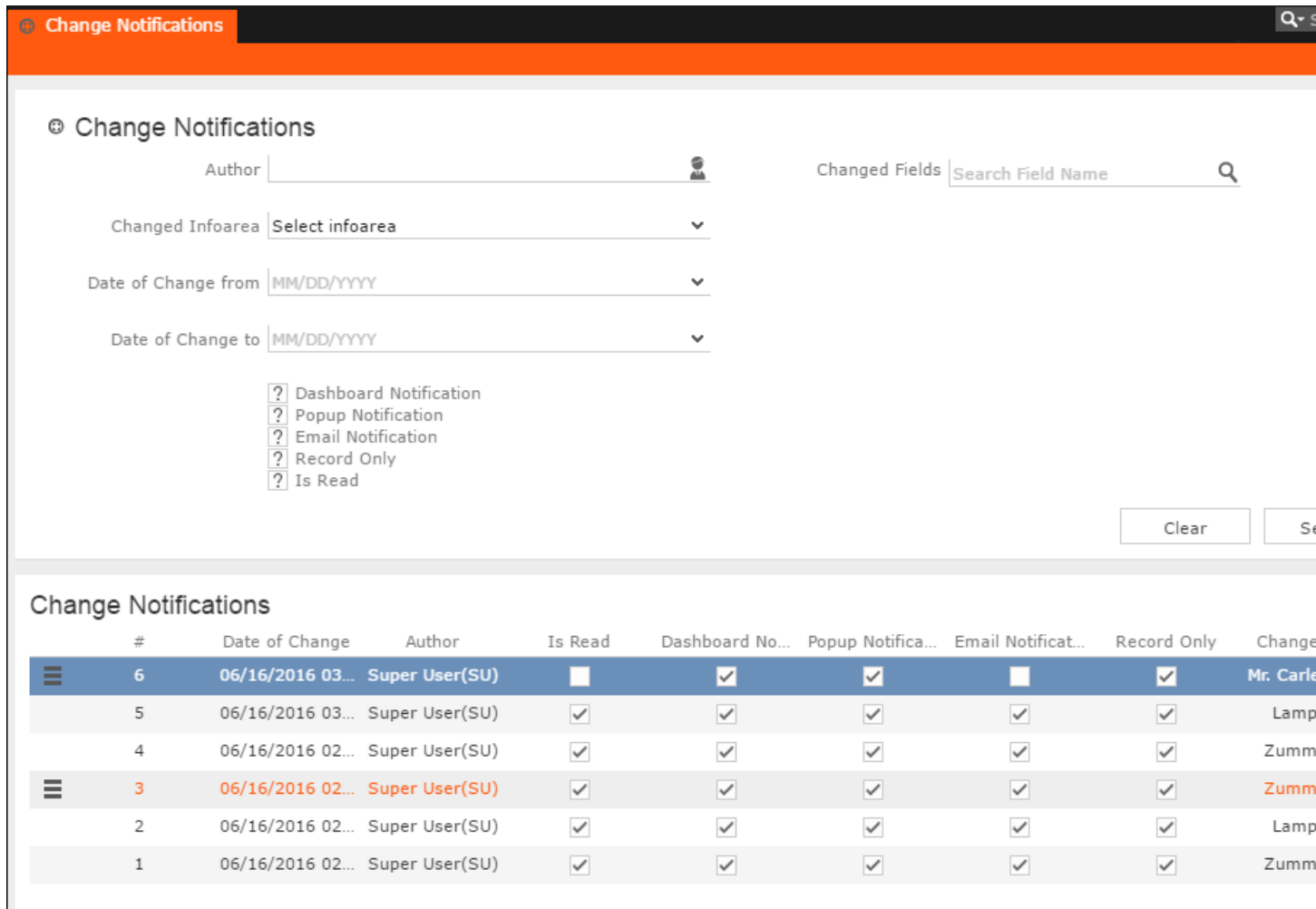
You can also mark a change notification from the change notification search page. To do this:

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.

Change Notifications							
#	Date of Change	Author	Is Read	Dashboard Notification	Popup Notification	Email	
2	06/06/2016 12:06 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
1	06/06/2016 12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

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

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

Change Notifications							
#	Date of Change	Author	Is Read	Dashboard Notification	Popup Notification	Email	
2	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
1	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

- The Change Notifications Details window displays.

Change Notification Details ✕

Change Notification Details

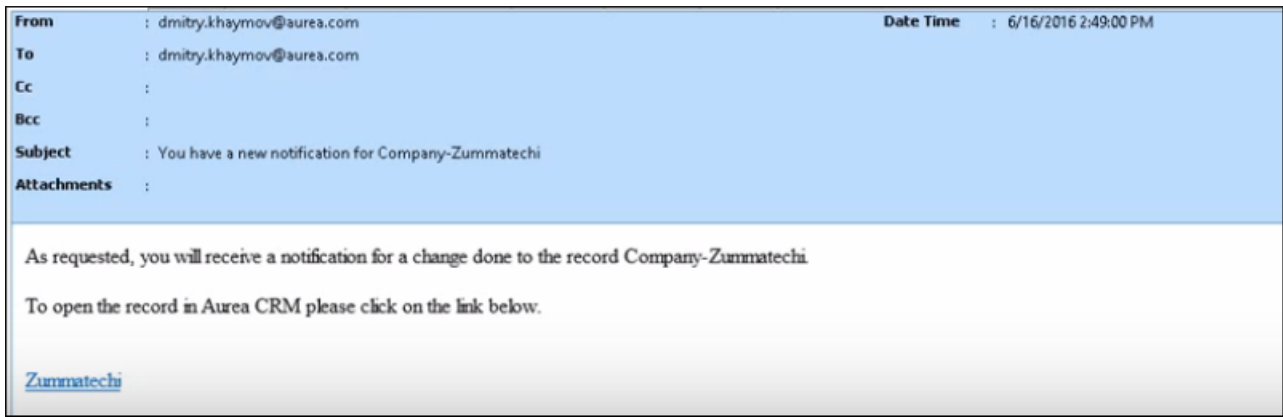
Changed Item Person in Company-Mr. Carlene McNary Date of Change 06/16/2016 03:29 pm
 Author Super User - SU (10000002) Is Read

Changed Fields

Field Id	Field Name	Field Type	Updated Value
20	ZipCode	Character	34343

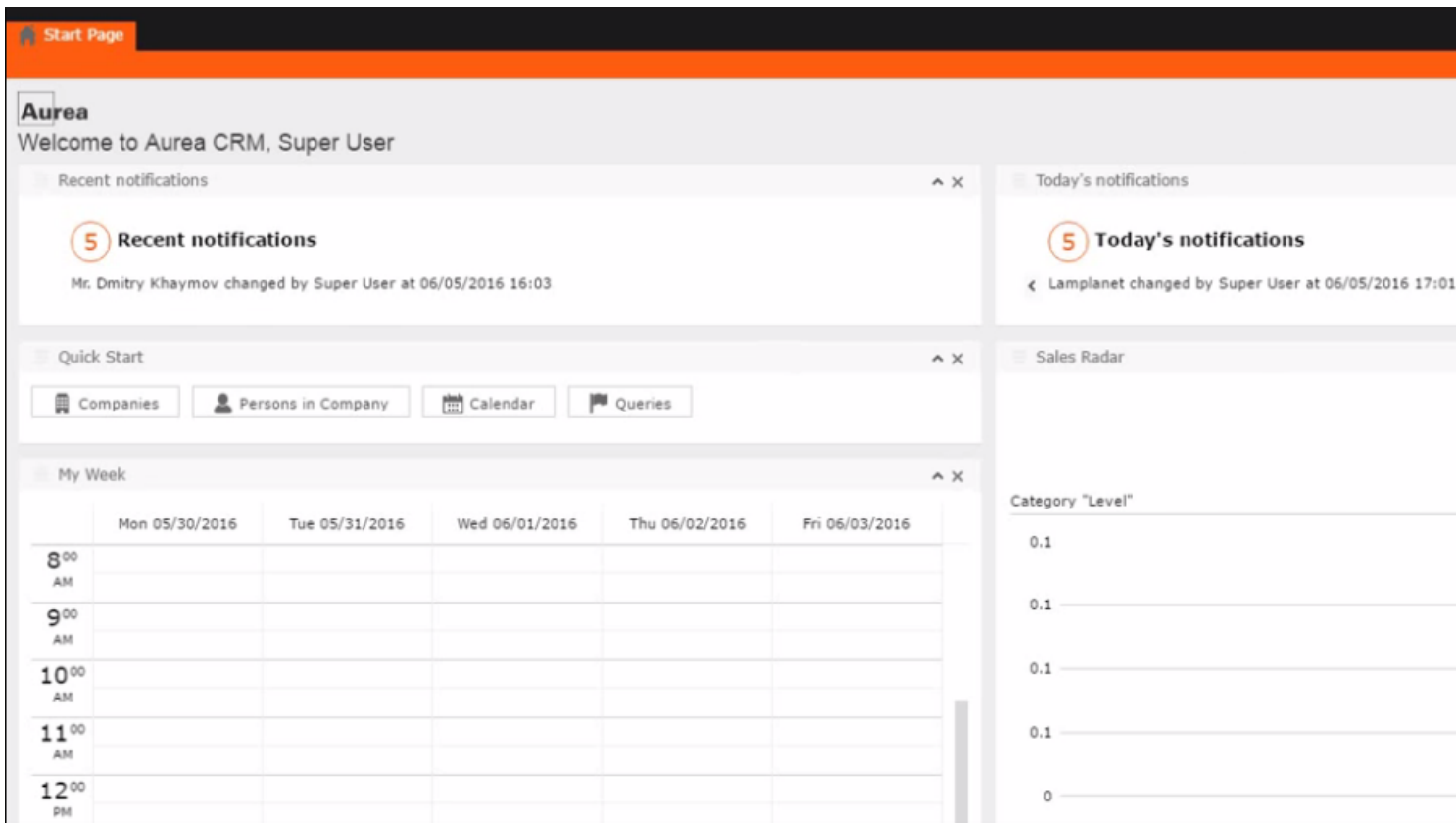
- Click **Mark as Read**.

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



Change Notifications on the Dashboard

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



Note: 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, >> on page 77. 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  (**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:


Executing an Analysis

To execute an analysis:


1. Load an analysis, >> on page 96.

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.

1. Click on **Export** () to export the data as either CSV or XML, depending on your settings, >> on page 34.

Note: 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, >> on page 96.
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.

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

Filter

Type	Visit	▼
Status	Completed	▼
Starts on from		▼
Starts on to		▼
Country	Austria	▼

»» Run

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

Cumulative Analyses

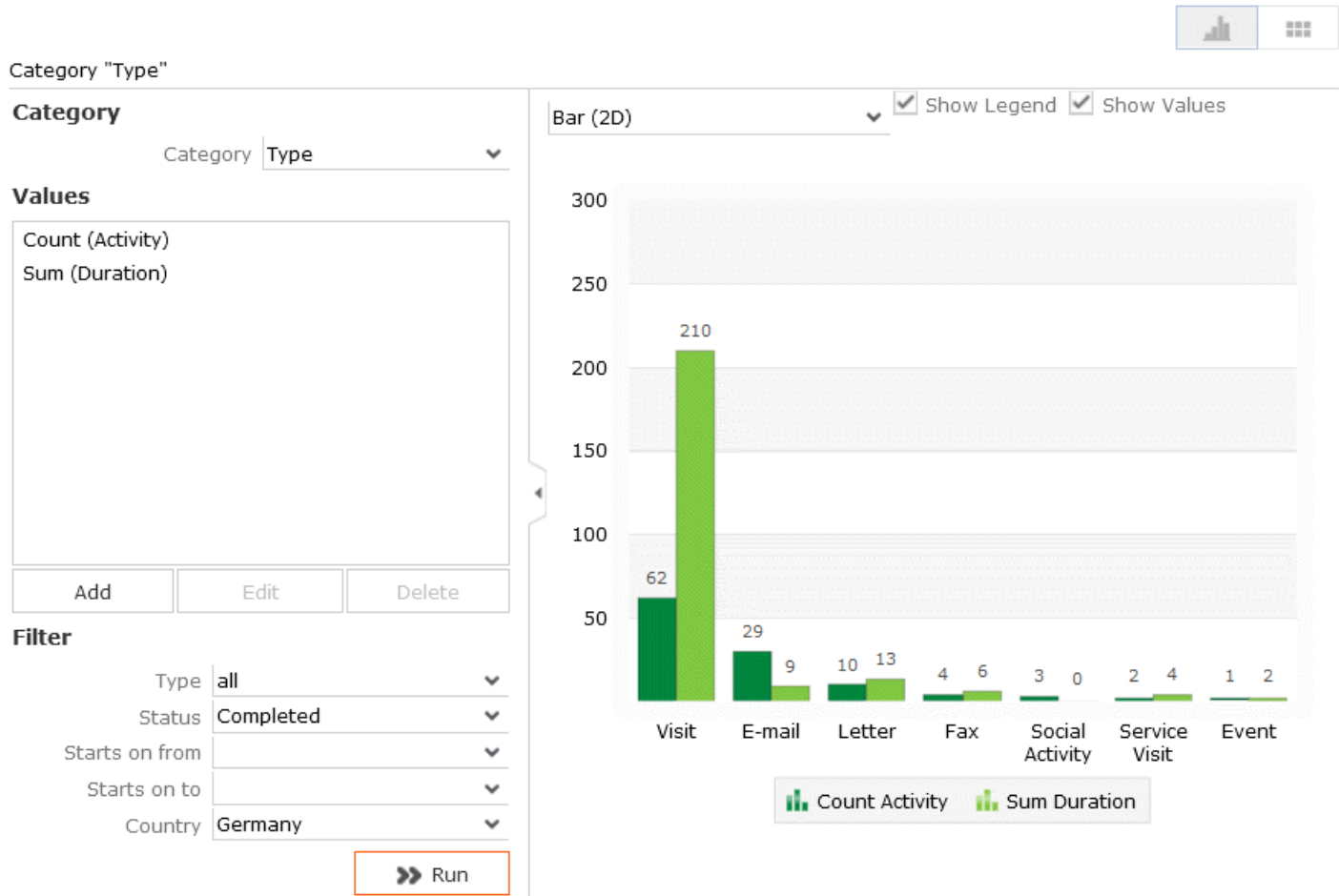
Your administrator can define (in CRM.designer) that the highest value in a column is displayed in the sum total, instead of the actual total.

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:

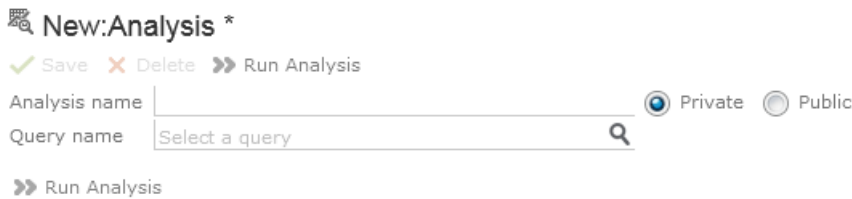
1. Execute the analysis, >> on page 96.
2. Click on the **Show Chart** tab.
3. Use the drop-down list to determine the type of chart, e.g. a bar or pie chart. The chart is displayed.




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:

New:Analysis *
^

✓ Save ✗ Delete >> Run Analysis

Analysis name
 Private Public

Query name

Categories, Values, Filter

List

Categories ≡ Hide unused

Disable ... Show all...

<input checked="" type="checkbox"/> Last Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> First Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Country (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Date of Birth (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Type (Activity)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Status (Activity)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Starts on (Activity)	<input type="checkbox"/>	<input type="checkbox"/>

Default Values

Maximum number of bars <input type="text" value="10"/>	Default for category <input type="text"/>
Currency field <input type="text" value="not selected"/>	Percentage field <input type="text" value="not selected"/>

Values ≡ Hide unused

<input checked="" type="checkbox"/> Activity	Count
<input type="checkbox"/> Person	Count

Filter ≡ Hide unused

Filter must be selected

<input type="checkbox"/> Last Name (Person)	<input type="checkbox"/>
<input type="checkbox"/> First Name (Person)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Country (Person)	<input type="checkbox"/>
<input type="checkbox"/> Date of Birth (Person)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Type (Activity)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Status (Activity)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Starts on (Activity)	<input type="checkbox"/>

>> Run Analysis

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

- Categories, >> on page 99
- Values, >> on page 100
- Filters, >> on page 100
- List, >> on page 101

7. Save the analysis.

Defining Analysis Categories

To define the categories in an analysis:

1. Define an analysis, >> on page 98 or load an existing one.
2. Define the categories in the **Categories** area:

Categories ≡ Hide unused

	Disable ...	Show all...
<input checked="" type="checkbox"/> Last Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> First Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Country (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Date of Birth (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Type (Activity)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Status (Activity)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Starts on (Activity)	<input type="checkbox"/>	<input type="checkbox"/>

3. The following options are available:

- The output fields in the query are listed. Enable the check box on the left to determine the fields by which values in the analysis should be grouped.
- **Disable sorting of results:** If this option is enabled, values are not sorted.

If this check box is disabled, the results categories in the analysis are sorted according to the size of the result (sum total / average of the field values or number or records).

This check box is only available for catalog values and date fields.

- **Show all values (even if value is 0):** Enable this check box to display categories even if their value is zero.

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

Defining Analysis Values

To define the values in an analysis:

1. Define an analysis, >> on page 98 or load an existing one.
2. Define the values in your analysis in the **Values** area.

Only numeric values are listed, as only numeric values can be displayed in the analysis.

Values ≡ Hide unused

	Currency-dep...	Percentage-de...
<input checked="" type="checkbox"/> Activity	Count	
<input type="checkbox"/> Person	Count	

The following options are available:

- Use the check box to the left of the values to determine which values data can be analyzed by.
- **Percentage-dependent:** Enable this check box if you want to total all weighted values. You need to have selected a **Percentage Field** from the drop-down under **Define Defaults Values** for this setting to be applied.
- **Currency-dependent:** Enable this check box if you want to convert the contents of currency fields to the currency used by the analysis. You need to have selected a **Currency Field** from the drop-down list under **Define Default Values** for this setting to be applied.

Defining Analysis Filters

To define filters for an analysis:

1. Define an analysis, >> on page 98 or load an existing one.
2. Define the fields that can be used as filter criteria in the analysis in the **Filters** area.

Categories	Hide unused	
	Disable ...	Show all...
<input checked="" type="checkbox"/> Last Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> First Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Country (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Date of Birth (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Type (Activity)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Status (Activity)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Starts on (Activity)	<input type="checkbox"/>	<input type="checkbox"/>

3. The following options are available:

- Enable the check box to the left of a field to allow the field to be used a filter criteria in the analysis.
- **Filter must be selected:** Enable this check box if a value must be selected for the criteria selected under **Filter** before the analysis is executed. Otherwise you are informed that the analysis cannot be executed.

Use this option if too many records would otherwise be included in the analysis, in which case the analysis may take a long time to execute.

Defining the Analysis List View

After executing the analysis, you can select **Display Details** from the context menu in the results list to view a list containing the results of the analysis. You need to define which fields are displayed in this list beforehand.

To define the list view for an analysis:

1. Define an analysis, >> on page 98 or load an existing one.
2. Click on the **List** tab.
3. Define which fields are displayed in the list and their properties.

Type (Activity)	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, >> on page 96.
2. Click on  (**Show/Hide**) in the header.
The area used to define the analysis is displayed.
3. Edit the analysis.
4. Save your changes.

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

Note: 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: 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, >> on page 96.
2. Select **Drill-Down** from the context menu to further analyze a value according to further criteria. You can also click on a bar or pie in the graphic to display the context menu.

Results (10 record(s)) X [] v

Type	Count Activity	Count Person
Menu	1.204	84
Drill down Starts on (monthly)	510	127
Drill down Starts on (quarterly)	406	102
Drill down Starts on (yearly)	161	34
Drill down Starts on	74	4
Drill down Country	54	8
Event	47	10
Fax	32	7
Info	25	6
Internet	9	5
	2.522	215

You can choose from the selected catalog fields in the analysis (apart from those that are analyzed at the top level of the analysis).

3. Select a field.

The details for this field are displayed.

1. Click on the **Drill-Up** button to move up a level within the analysis or use the breadcrumb trail to navigate to the desired level.

Type "E-mail" > Starts on (monthly) "Dec 2012" > Category "Country"

Category

Category Type ▼

Values

Count (Activity)

Count (Contact Person)

Results (8 record(s))

Country	Count Activity	Count Con
Austria	78	
Hungary	13	
France	8	

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, >> on page 101.

To display the details:

1. Select **Display Details** from the context menu.
2. A list containing the results of the analysis is displayed. The values you selected in the **List** tab when defining the analysis are displayed here.

Results (7 record(s)) X [] ▼

Last Name	First Name	Type	Country	Status	Date of Birth
Aki	Chris	Visit	Italy	Sched...	
	Chris	Visit	Italy	Compl...	

Display Details

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

Results (7 record(s)) X [] ▼

Last Name	First Name	Type	Country	Status	Date of Birth
Aki	Chris	Visit	Italy	Sched...	

Acad. Title

Language English

Nationality

Date of Bi... 07.02.1977

Rep

Office Rep

Bubble Charts

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

You can display bubble charts, but you cannot define parameters such as 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:

OpportunityBubble

Category "Coordinates"

Filter

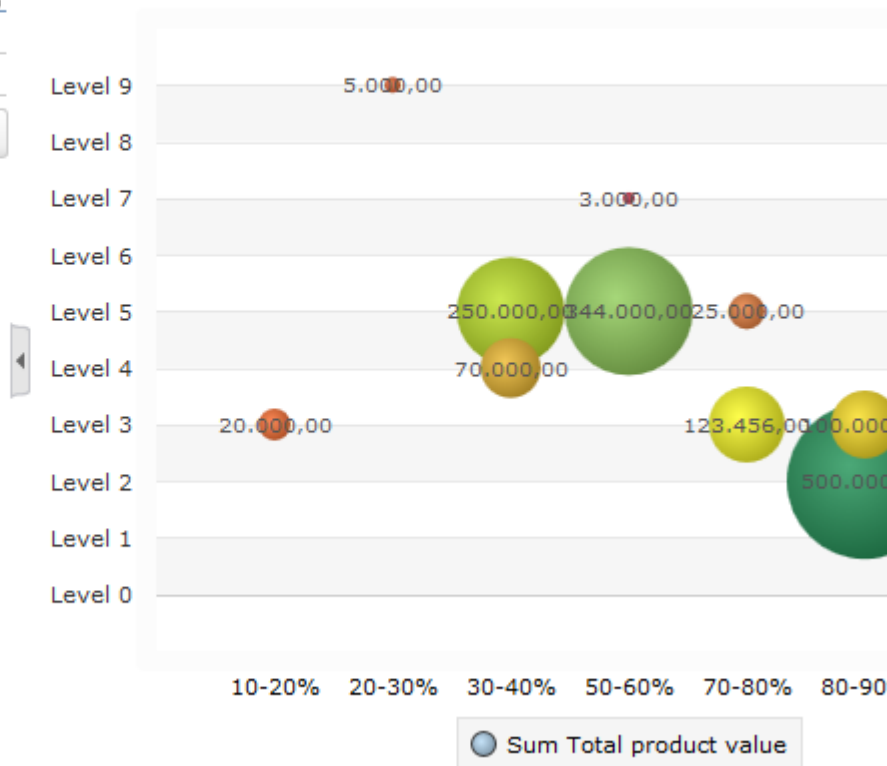
Show Legend Show Values

Rep ID Miranda Meyer 

Completion Date from 01.01.2013 ▼

Completion Date to 01.01.2014 ▼

Run

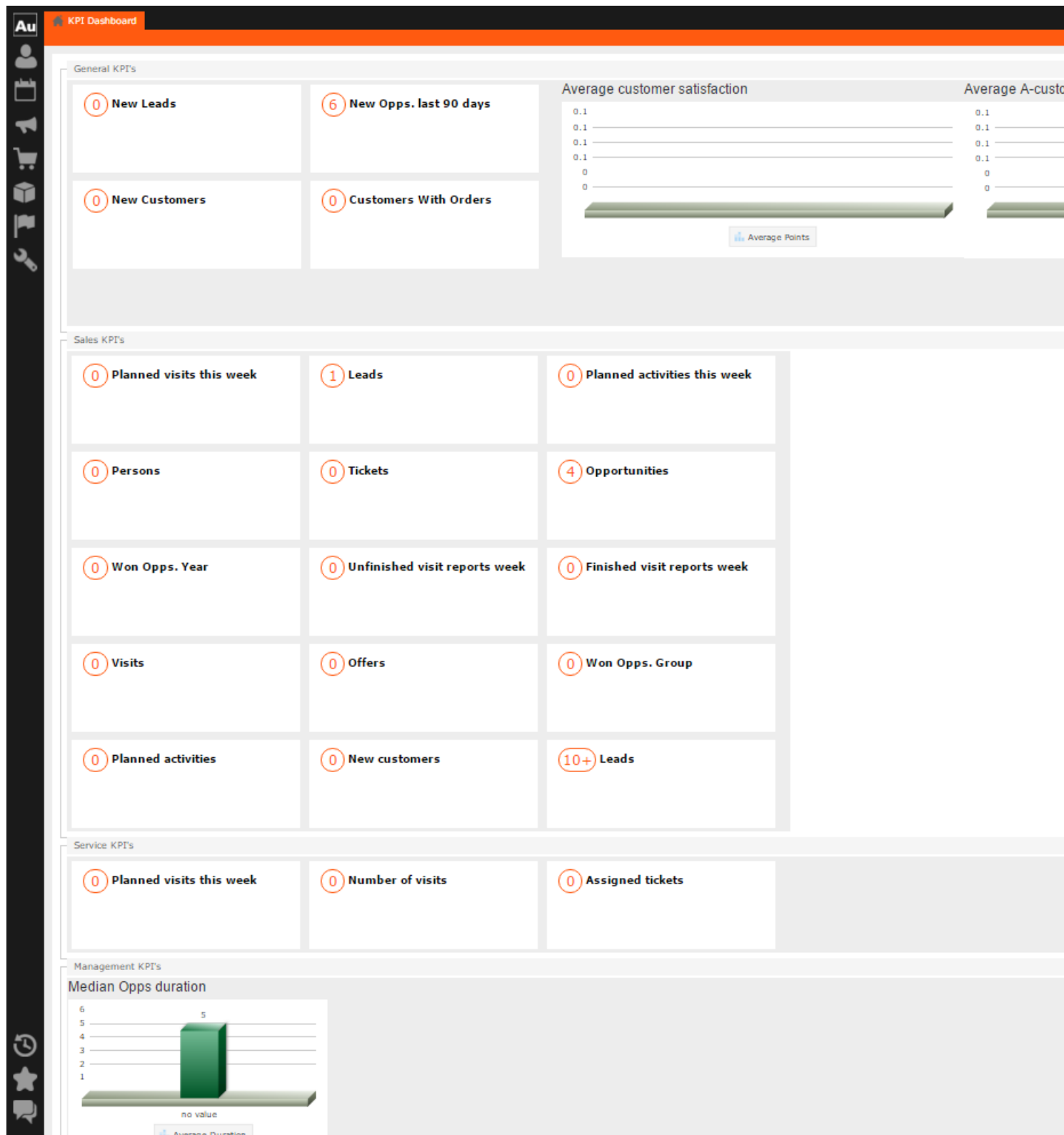


Your administrator can define additional charts.

Key Performance Indicators Dashboard (Enterprise CRM)

The KPI dashboard provides a quick measure of your business metrics primarily focusing on customer development and management. It shows the current state of your sales for existing and new customers. This would be very useful in monitoring open calls, new customers of interest and other related information without having to be informed by e-mail.

The following screenshot shows the KPI dashboard.



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

KPI Category	Type	Name on the dashboard	Description
General	Query	New leads	Number of new potential customers (leads) developed per 90 days.
General	Query	New Opps. last 90 days	Number of new opportunities in the last 90 days.
General	Query	New Customers	Number of new customers (have placed 1 order) in the last 90 days.
General	Query	Customers With Orders	Number of customers have placed total orders greater than X in the last 12 months. Note: Note: The size of an order in the query is defined by your management. Contact your administrator to reset the order size according to your requirement.
General	3D Bar	Average Customer Satisfaction	Average Customer satisfaction score of all customers this year and value from the previous year (measured per calendar year).
General	3D Bar	Average A-customer satisfaction	Average customer satisfaction score in A customers and the value from the previous year.
General	3D Bar	Mean visits for won opps. 12 month	Mean number of visits for the opportunities won in the last 12 months.
Sales Rep	Query	Planned visits this week	Number of visits planned for this week for the current sales representative.
Sales Rep	Query	Leads	Number of leads (potential customers) for the current sales representative.
Sales Rep	Query	Planned activities this week	Number of visits planned for this week for the current sales representative.
Sales Rep	Query	Persons	Number of new persons planned for the current sales representative.

KPI Category	Type	Name on the dashboard	Description
Sales Rep	Query	Tickets	Number of tickets for the current sales representative.
Sales Rep	Query	Opportunities	Number of opportunities for the current sales representative.
Sales Rep	Query	Won Opps. Year	Number of won opportunities for this year for the current sales representative.
Sales Rep	Query	Unfinished visit reports week	Number of unfinished visit reports for this week for the current sales representative.
Sales Rep	Query	Finished visit reports week	Number of finished visit reports this week for the current sales representative.
Sales Rep	Query	Visits	Number of visits planned for the current sales representative.
Sales Rep	Query	Offers	Number of offers for the current sales representative.
Sales Rep	Query	Won Opps. Group	Number of won opportunities for rep's sales team (org group) can be used to compared to other teams (gamification).
Sales Rep	Query	Planned activities	Number of appointments planned for the current sales representative.
Sales Rep	Query	New customers	Number of new customers for the current sales representative.
Sales Rep	Query	Leads	Number of leads (potential customers) for the current sales representative.
Service Rep	Query	Planned visits this week	Number of visits planned for this week.
Service Rep	Query	Number of visits	Number of visits done by the service representative.

KPI Category	Type	Name on the dashboard	Description
Service Rep	Query	Assigned tickets	Number of assigned tickets.
Management	3D Bar	Median Opps Duration	Graph depicting the median of the duration of each opportunity.

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

Quick Add

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

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


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

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

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

Switching to Edit Mode

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

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


Note: 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: 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.

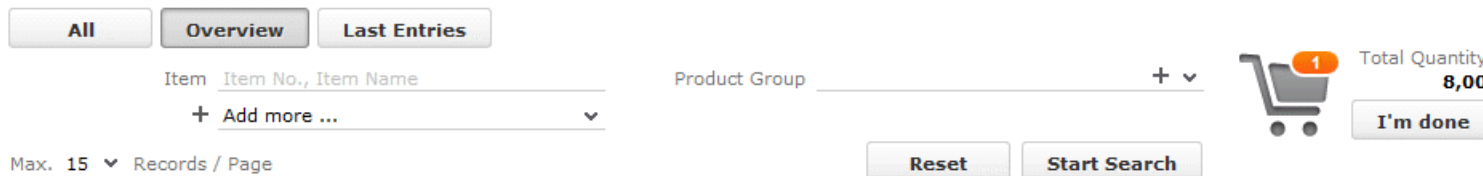
Viewing Item Details in the Related Data

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.



The screenshot shows a search interface with three filter buttons: "All", "Overview", and "Last Entries". Below the buttons is a search area with two input fields: "Item" (with subtext "Item No., Item Name") and "Product Group". The "Item" field has a dropdown arrow and a "+ Add more ..." link. To the right of the "Product Group" field is a "+" and "-" icon. Below the search fields is a "Max. 15 Records / Page" label with a dropdown arrow. On the right side, there is a shopping cart icon with a "1" badge, a "Total Quantity 8,000" label, and an "I'm done" button. At the bottom right, there are "Reset" and "Start Search" buttons.

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, >> on page 104.
4. The item master is listed.


Items of Offer No. 2130000022

Item Product Group

Business Area Sport

Max. Records / Page

<< < 1 - 2 of 2 > >>

Item No.	Item Name	Quantity	Selling
 FB-1	Football Shirt (M)	100,00	
<input checked="" type="checkbox"/> <input type="checkbox"/> 222-BB	Metal Baseball Bat MB100	<input type="text" value=""/>	12,00

112,00



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, >> on page 105.





6. Click on an item in the results list, and enter the desired values (e.g. quantity and end price) in the list.

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

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

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:

<< < 1 - 2 of 2 > >>

 Item No.	Item Name	Quantity	Selling
  FB-1	Football Shirt (M)	<input type="text" value="100,00"/>	
 222-BB	Metal Baseball Bat MB100	12,00	

112,00

Related Data

Offer Items ×

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

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


Shopping Cart

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



Key values regarding the items are displayed to the right of the shopping cart. Click on the shopping cart to display the items in the cart:

Last Entries



Total Quantity
112,00
 Net Total
4.320,00


Item Name

Product Group

+ v

+ v

« < 1 - 2 of 2 > »»

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

112,00

74,00
 « < 1 - 2 of 2 > »»

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):

Portfolio ABC Type Opportunity portfolio

Text Opportunity Evaluation

Max. Points

points (po...)

al descri...

Area Code


Info Area

Created by

Created on

Language-independent	Opportunity Evaluation
German	
English	
French	
Spanish	

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: 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**.

Related Data 📁 ▼ ☰

Contact Time x
Potential x
Note x
Portfolio x
Lead Status x
🔍
📄

📄 New ↪ Browse

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

CRM.launcher

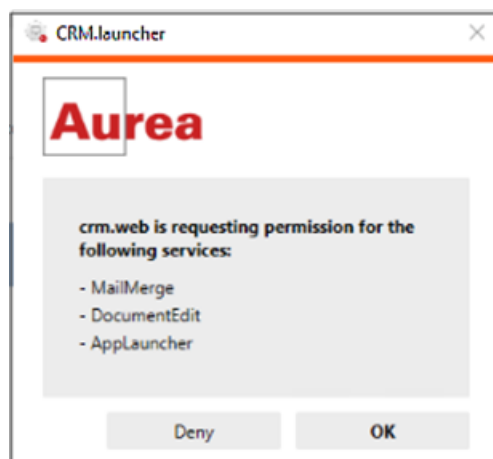
CRM.launcher (included with Aurea CRM web) is required to perform certain actions in the application. The first time you initiate an action that requires CRM.launcher, a message that CRM.launcher needs to be installed on your computer is displayed. You can install CRM.launcher by clicking the link in this message, >> on page 109.

CRM.launcher is required for:

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

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

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



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

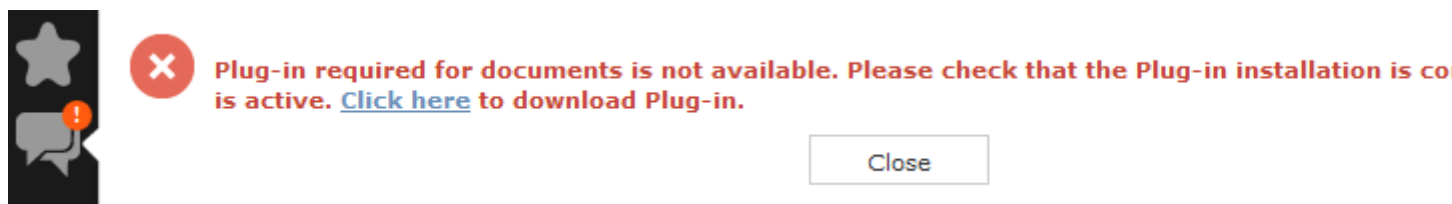
Note: Note: Aurea software recommends using Google Chrome as your browser, as problems may occur under certain circumstances when using Firefox.

Installing CRM.launcher

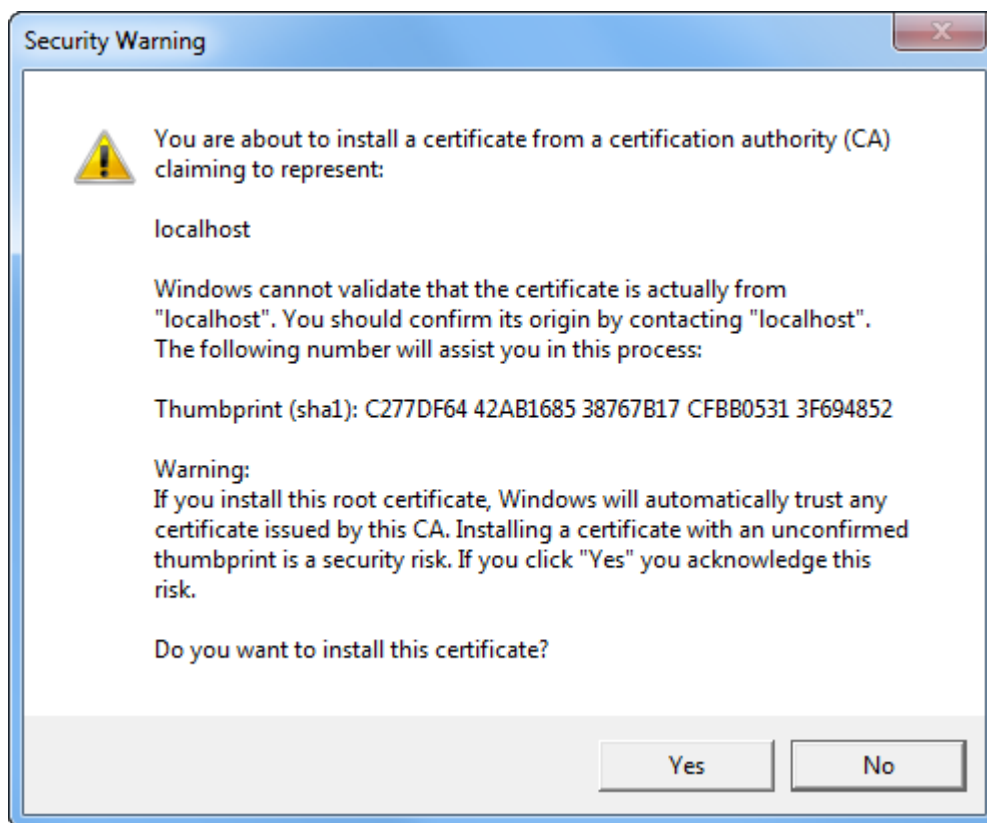
To install CRM.launcher:

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

The following message is displayed:





2. Download the application and executed CRM.launcher.exe.
CRM.launcher is installed automatically.
3. Confirm the installation (**Finish** button in the **CRM.launcher - InstallShield Wizard**).
4. Once the installation is complete, a certificate is displayed. You need to install this certificate.



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

CRM.launcher in the Windows Taskbar

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

1. Right-click on  in the taskbar.
2. Select the desired option:
 - **Check for Updates**, >> on page 110.
 - **Open offline CRM** or **Open online CRM**, >> on page 111.

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

- **Settings**, >> on page 110, on page 110 and on page 111.
- **Exit**

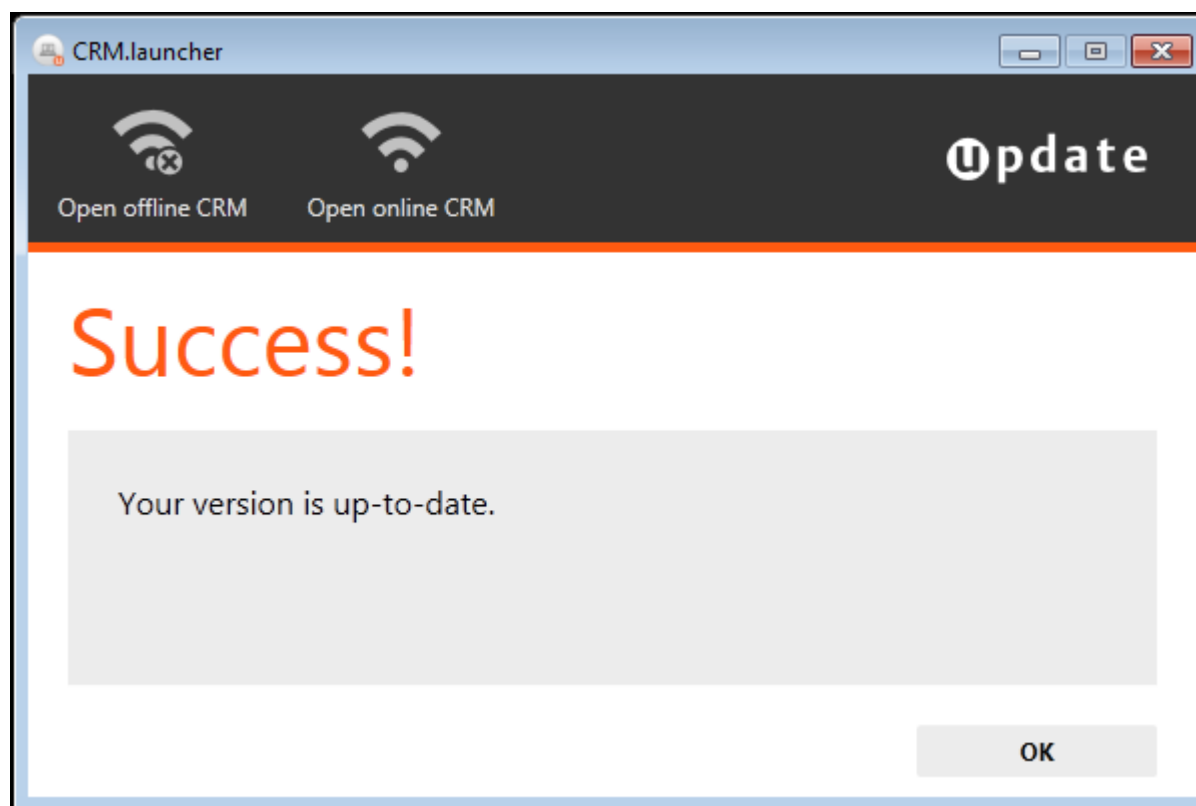
Check for Updates

Select this option to update the application if an update is available.

Select **Check for Updates**:

- If an update is available, it is installed.
- Contact your administrator if CRM.launcher determines that the version on the server is not compatible with your client version, and no update is available.

Once you have completed the installation, you can choose to work in online mode (if you have a network connection) or in offline mode:



Switching Languages


To change the language:

1. Right-click on the CRM.launcher icon (🖱️) in the taskbar and select **Settings** from the context menu.
2. Select the desired **Language** from the drop-down list on the **General** tab.
3. Click on **OK**.

Creating Bug Reports

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

To create an error report:

1. Right-click on the CRM.launcher icon () in the taskbar and select **Settings** from the context menu.
2. Switch to the **Troubleshooting** tab and click on (**Create Bug Report**).

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

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

Note: 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: 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: 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: 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, >> on page 4. 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: 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: 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: Note: If the field is a drop-down list, use Ctrl+Up instead.

Down cursor key	<p>Switches to the same field in the next row. Changes to the current row are saved in the process.</p> <hr/> <p>Note: Note: If the field is a drop-down list, use Ctrl+Up instead.</p> <hr/>
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>	<p>Displays the tab at the corresponding position, e.g. Alt+3 opens the third tab.</p> <hr/> <p>Note: Note: You first need to activate the Related Data area with Alt+0.</p> <hr/>
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

Companies and Persons

Learn how to add companies and persons and manage them.

Use the **Accounts** menu to add new companies and persons, or to search for existing records. This topic does not cover general functions such as searching, editing records etc.

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

Learn how to store 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 your system is configured accordingly), e.g. to store separate billing addresses.

You can only add a single additional address per **Address Type** per company/person.

Additional Addresses

You can add additional addresses for companies (and persons, if your system is configured accordingly), e.g. to store separate billing addresses.

You can only add a single additional address per **Address Type** per company/person.

Merging Companies and Persons

Learn how to merge duplicate company and person records in the database 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.

Start Merge Process
Source: M. Erge Inc.
Target: M. E. Erge

Prepare **Resolve** 0% **Run**

Overview of records to be merged

Source Record (will be deleted)	Target Record (will be kept)
Company M. Erge Inc. Postal Code 21000 City New York Street Kensington St. 111 Country USA	Company M. E. Erge Postal Code City New York Street Ken St. Country

Switch records

Merge method

If a conflict occurs:

- user decides conflict resolution
- Source record always wins.
- Target record always wins.
- In the case of conflicts the newer record is used

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.

Start Merge ProcessSource: M. E. Erge
Target: M. Erge Inc.

Prepare

Resolve

0%

Run

Resolve Conflict for Company M. E. Erge and Company M. Erge Inc.

Field	Source Company M. E. Erge	Target Company M. Erge Inc.
Company	M. E. Erge 15.03.2013 15:00	✓
Country	✓ UK 15.03.2013 15:08	
Postal Code	✓ SW 10 15.03.2013 15:08	
City	✓ London 15.03.2013 15:08	
Street	✓ Kennington Street 99 15.03.2013 15:08	
Country Code		✓
Telephone	✓ 789456-0 15.03.2013 15:00	
Fax	✓ 789456-2 15.03.2013 15:00	
E-mail 1	✓ info@erge.co.uk 15.03.2013 15:08	
Rep 1 ID	010001954 15.03.2013 15:08	✓
Rep 2 ID	✓ 010001678 15.03.2013 15:08	
Co. Type		✓
Sector		✓
Rep 1 Grp. ID	✓ 010000007 15.03.2013 15:08	
Rep 2 Grp. ID	✓ 010000007 15.03.2013 15:08	
Rep 1	✓ Peter Parker 15.03.2013 15:08	
Rep 2	✓ Miranda Meyer 15.03.2013 15:08	
Rep 1 Grp.		✓
Rep 2 Grp.	✓ Release Management 15.03.2013 15:08	

- 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 is different (which can cause conflicts); you therefore need to click on **Continue** for each record.

9. Click on **Start Merge Process**.

Contact Times

Learn how to enter color coded times on a daily and weekly planner.

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

Learn how to depict hierarchies and networks between companies and persons using Relationships.

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.

Add a new Relationship with Company Overpowered Industrial Machines Ltd.

Create reciprocal relationship

Search Relationship level

Relationship type	+ v	Relationship	
Business Area	+ v	Level	
Reciprocal Rel. Type	+ v	Reciprocal Rel.	
Reciprocal Rel. Bus. A...	+ v	Reciprocal Rel. Level	
+ Add more ...			v

Max. 15 records per page

Search Results << < 1 - 15 of 15+ > >>

	Relationship type	Relationship	Business Area	Reciprocal Rel. Type	Reciprocal R
	business	partner		business	partner
	business	supplier		business	customer
	business	customer		business	supplier

5. Select an existing relationship on the **Predefined** tab of switch to the **Customize** tab to define a new relationship.

Predefined **Customize**

Create reciprocal relationship

Type	business	+ v	Relationship	employer	+ v	Business Area	
Type	business	+ v	Relationship	employee	+ v	Business Area	

Contin

- Enter the **Type** of relationship, the **Relationship** and the **Business Area**. The first row defines the relationship, the second row defines the reciprocal relationship.
- 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, see [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.

Search Relationships linked to Company Krist OY

Relationship + ▾ Relationship type

Business Area + ▾

+ Add more ... ▾

Max. Records / Page Company-Related

Search Results << < 1 - 3 of 3 > >>

Relationship type	Relationship	Business Area	Company
Business	is employer of	Integrated Systems	Krist OY
Business	is customer of	Integrated Systems	Tea China
Business	is partner of	Integrated Systems	Gewo Baugenossensch

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.

Relationship Network for Company AkiComp

New Relationship Cross Links

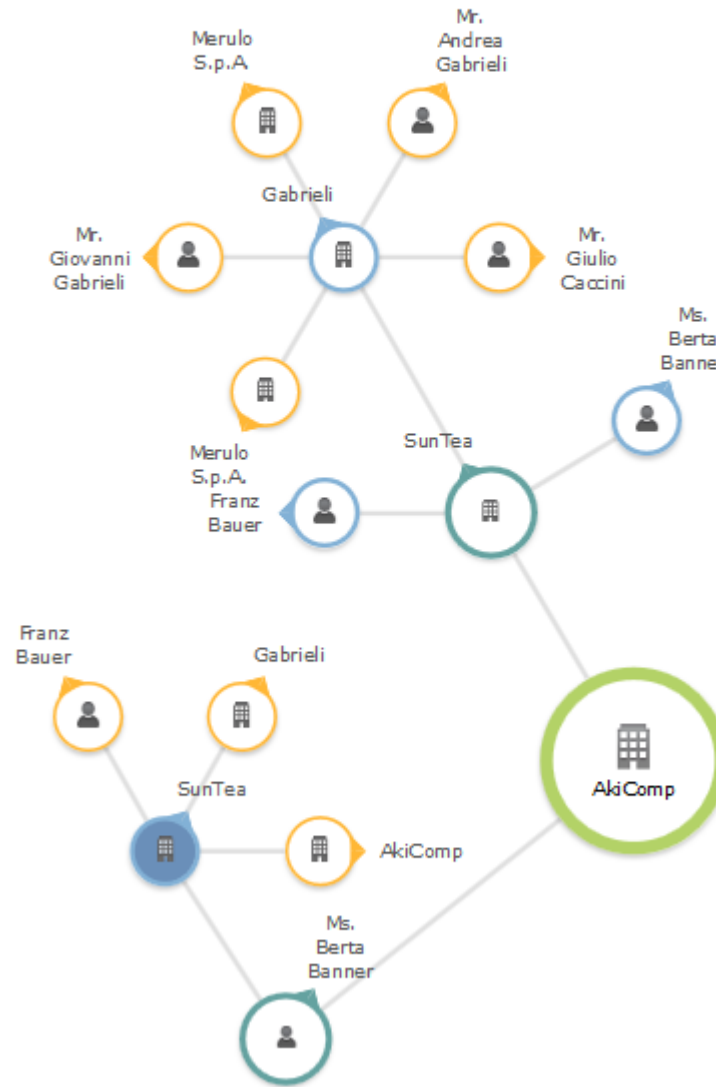
SunTea
Teatown, United Kingdom
Cold


Franz Bauer
commercial, customer


Gabrieli
commercial, supplier





AkiComp
commercial, supplier

Ms. Berta Banner
business, partner

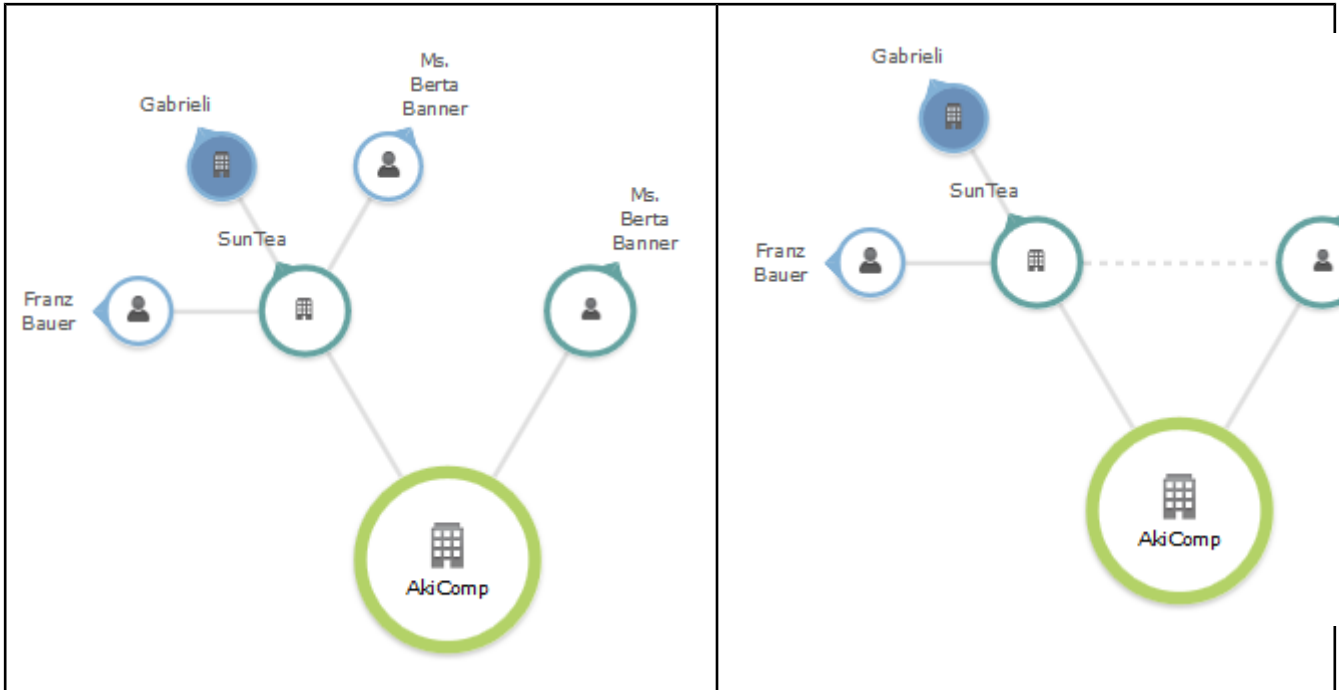


- The current record (company or person) is displayed at the center (large node with a green border). All records that are linked to the current record via a relationship are displayed surrounding the current record. Reciprocal relationships are not displayed.
- Move the mouse cursor over a connecting 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. 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.



Note: 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., see [CircleOfInfluence](#) in the *Aurea CRM web Administrator Guide*.


Note: The relationship network can also be used to display corporate structures, see [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: 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  (**Administration**) > **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 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: 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.

Enable the **Relationship hierarchy** field if the relationship level record defines a relationship used to define a corporate structure. 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.

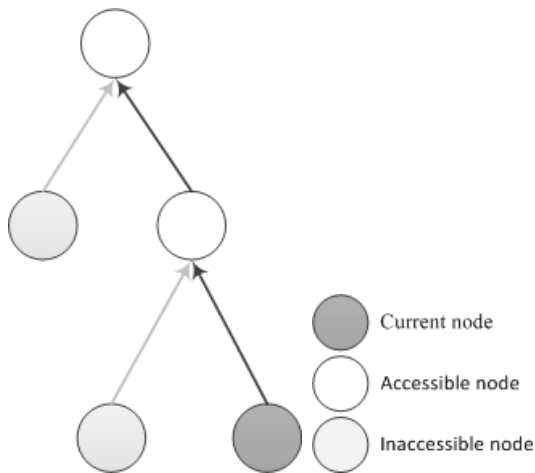
Corporate Structure

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, see [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.

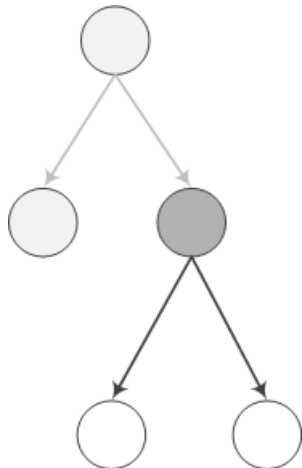
The corporate structure can be used to grant access to child records of companies and persons (nodes in the example trees below), e.g.:

- 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. 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...	Re
	Corporate	is parent of	1	Corporate	is subsidiary of	2	
	Corporate	is subsidiary of	2	Corporate	is parent of	1	<input checked="" type="checkbox"/>

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.

The screenshot displays the 'Relationship' info area in Aurea CRM. On the left, a table lists relationship records with columns for station and serial numbers (PB_X_StaNo/SerNo) and parent tree links. On the right, a form provides details for a selected record, including relationship type, company information, and person details.

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), see [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, see [HierarchicalCircleOfInfluence](#) in the Aurea CRM web Administrator Guide.

OTC with Aurea CRM LSI

If you migrate an existing OTC installation to Aurea CRM LSI, the business logic of the **Relationship** and **Relationship type** fields in the **Relationship level** and **Relationship** info areas are reversed.

Corporate Structure Links

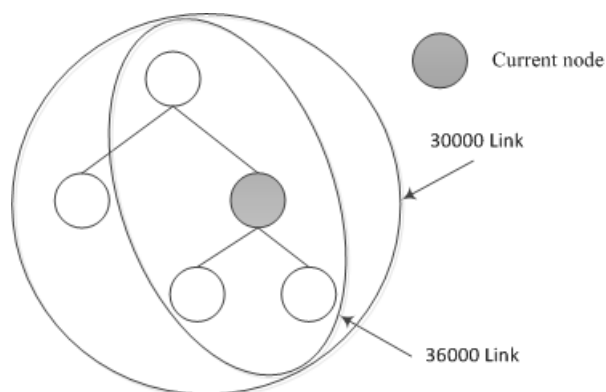
Aurea CRM offers indirect links (via the **Relationship** info area) that can be used to defined queries applied to the corporate structure, for example.

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), see [Link IDs](#) in the CRM.core Administrator Guide.

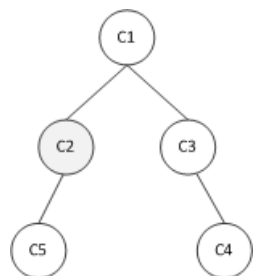
Indirect links (using the corporate structure) for companies and persons (FI/KP/PE/CP) applied to their child info areas:

- **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.

Company
 Output Fields: Company, Rep 1
 Sort by Company

Rep 1 ID = "Chris Aki"

WITH **Offer** (36000, FI_StaNo,FI_SerNo -> FI-StaNo,FI-SerNo)
 Output Fields: Text, Company
 Sort by Date

+ Conditions

Max. 100 rows

Run Query

Query Result

Export (MS Excel) Save as Query Snapshot Quick Ca

Company	Rep 1	Text
Firma 2	Chris Aki	Angebot zu Firma 1
Firma 2	Chris Aki	Angebot zu Firma 2
Firma 2	Chris Aki	Angebot zu Firma 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".

Variable
Sorted by: Type[Descending] View

Name	CORE::INDIRECT-PB-LINK-TREE-1	
Description		
Info Area	Relationship	
Field Name	Relationship type	
Type	Condition	Lock <input type="checkbox"/>

Variable Value
Sorted by: (2) Z6-StaNo,Z6-SerNo View

Z6-TenNo		
Stat. No.		
Rep Group ID		
Rep ID		
Language No.		
Login role		
Country		
Condition for info area		
Default		<input type="checkbox"/>

Var. Text	F4='Corporate{{0}}'	
Var. Number/Catalog		
Var. Rep ID		
Var. Date		
Var. Time (s)		
Var. Decimal		
Var. Logical		<input type="checkbox"/>
Link		

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, see [Variables](#) in the CRM.core Administrator Guide. You can also use indirect to define conditional access to companies and persons' child info areas, see [Conditions Applied via Indirect Links](#) in the CRM.core Administrator Guide.

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: 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.

♥ Add a new Relationship with Company Overpowered Industrial Machines Ltd.

Predefined Customize

Create reciprocal relationship

♥ Search Relationship level

Relationship type	+ ▼	Relationship	
Business Area	+ ▼	Level	
Reciprocal Rel. Type	+ ▼	Reciprocal Rel.	
Reciprocal Rel. Bus. A...	+ ▼	Reciprocal Rel. Level	
+ Add more ...			▼

Max. 15 ▼ records per page

Search Results << < 1 - 15 of 15+ > >>

	Relationship type	Relationship	Business Area	Reciprocal Rel. Type	Reciprocal R
	business	partner		business	partner
	business	supplier		business	customer
	business	customer		business	supplier

5. Select an existing relationship on the **Predefined** tab of switch to the **Customize** tab to define a new relationship.

Predefined Customize

Create reciprocal relationship

Type	business	+ ▼	Relationship	employer	+ ▼	Business Area	
Type	business	+ ▼	Relationship	employee	+ ▼	Business Area	

Contin

- Enter the **Type** of relationship, the **Relationship** and the **Business Area**. The first row defines the relationship, the second row defines the reciprocal relationship.
- 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.

Search Relationships linked to Company Krist OY

Relationship + ▾ Relationship type

Business Area + ▾

+ Add more ... ▾

Max. 15 ▾ Records / Page Company-Related

Search Results << < 1 - 3 of 3 > >>

Relationship type	Relationship	Business Area	Company
Business	is employer of	Integrated Systems	Krist OY
Business	is customer of	Integrated Systems	Tea China
Business	is partner of	Integrated Systems	Gewo Baugenossensch

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.

Relationship Network for Company AkiComp

 New Relationship Cross Links



SunTea

Teatown, United Kingdom
Cold

Franz Bauer

commercial, customer

Gabrieli

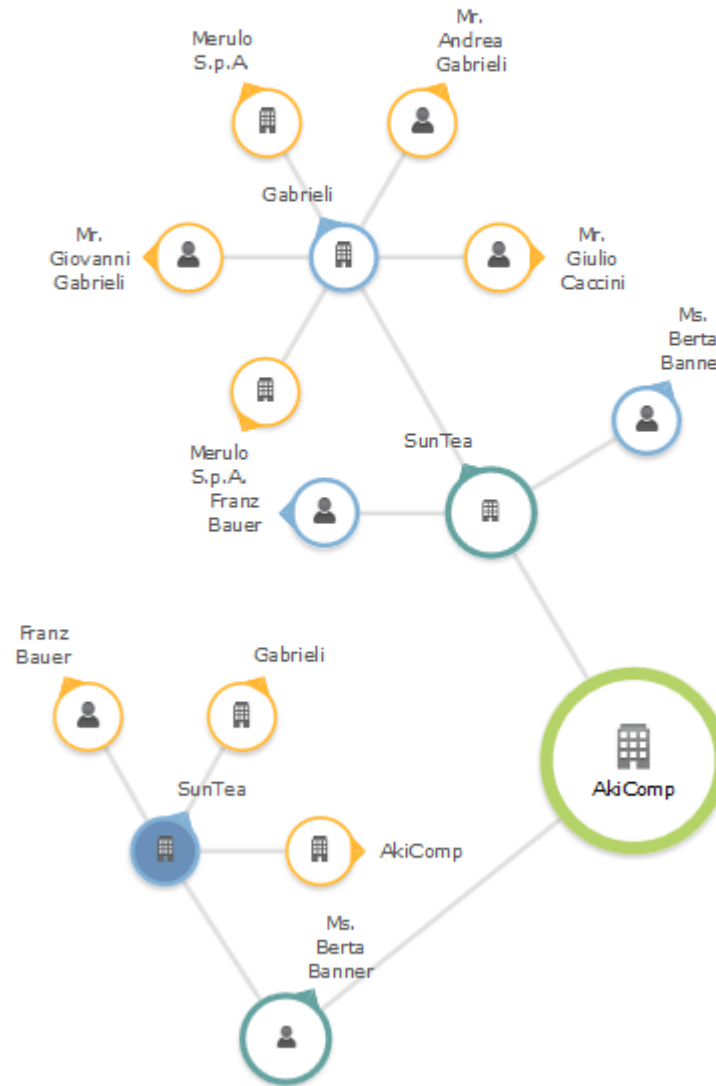
commercial, supplier


AkiComp


commercial, supplier

Ms. Berta Banner

business, partner







- 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.

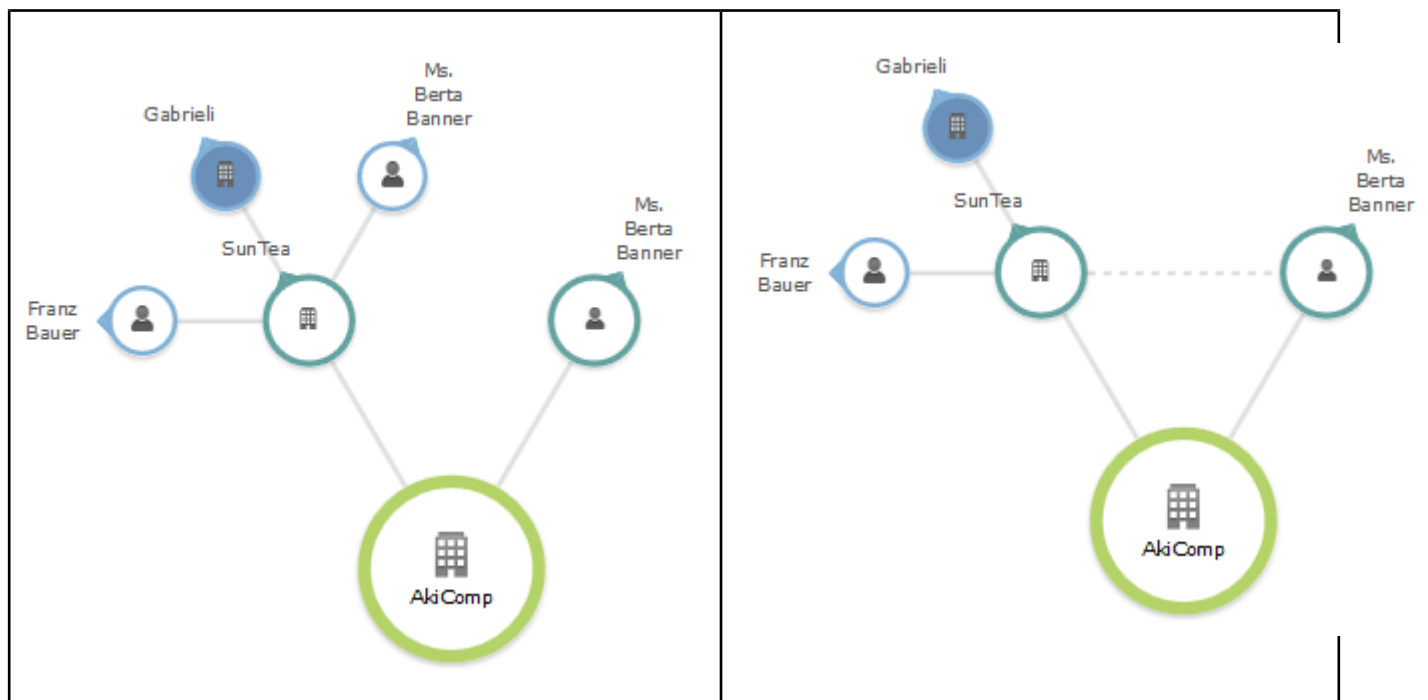
- Click on a node in the tree to select that company or person. The list of relationships on the left is updated to display the relationships defined for the selected company or person.
- Double-click on a node to open the corresponding record.
- Click again on a selected node to hide or display all 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, >> on page 120.

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.



Note: 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.


Note: 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: 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  (**Administration**) > **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 (>> on page 121) 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: 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.

Enable the **Relationship hierarchy** field if the relationship level record defines a relationship used to define a corporate structure, >> on page 125. 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.

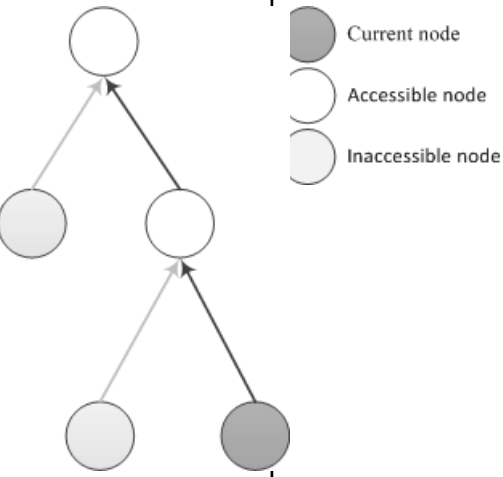
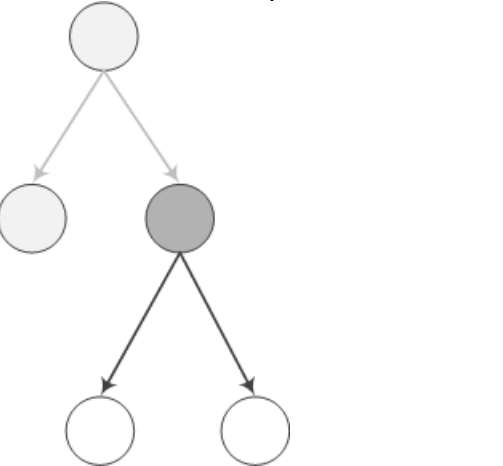
Corporate Structure

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, see [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.:

<ul style="list-style-type: none"> Child records stored for records directly above the current node in the corporate structure all the way to the root node. <p>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.</p>	
<ul style="list-style-type: none"> Child records stored for records directly below the current node in the hierarchy. <p>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.</p>	

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, >> on page 124. 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...	Relat
	Corporate	is parent of	1	Corporate	is subsidiary of	2	
	Corporate	is subsidiary of	2	Corporate	is parent of	1	<input checked="" type="checkbox"/>

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.

The screenshot displays the 'Relationship' info area in Aurea CRM. On the left, a table lists relationship records with columns for station numbers (PB_X_StaNo) and serial numbers (PB_X_SerNo). The right side shows a form for editing a specific relationship record, including fields for relationship type, company, and person details.

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), see [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, see [Hierarchical Circle of Influence](#) in the Aurea CRM web Administrator Guide.

OTC with Aurea CRM LSI

If you migrate an existing OTC installation to Aurea CRM LSI, the business logic of the **Relationship** and **Relationship type** fields in the **Relationship level** and **Relationship** info areas are reversed.

Corporate Structure Links

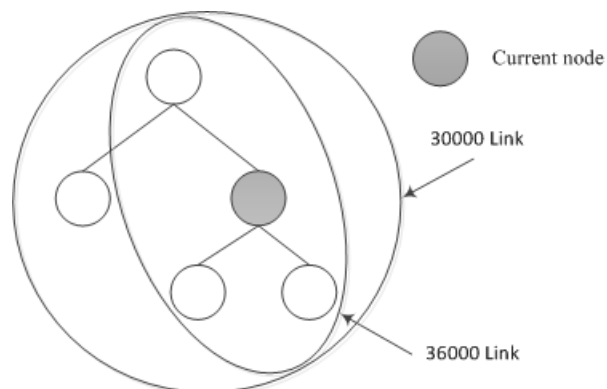
Aurea CRM offers indirect links (via the **Relationship** info area) that can be used to defined queries applied to the corporate structure, for example.

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), see [Link IDs](#) in the CRM.core Administrator Guide.

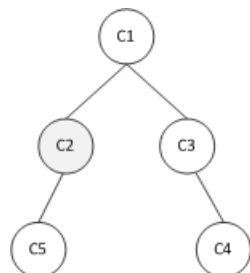
Indirect links (using the corporate structure) for companies and persons (FI/KP/PE/CP) applied to their child info areas:

- **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.

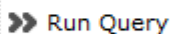

 **Company**
 Output Fields: Company, Rep 1 
 Sort by Company 

 **Rep 1 ID = "Chris Aki"**




 WITH **Offer** (36000. FI_StaNo,FI_SerNo -> FI-StaNo,FI-SerNo)
 Output Fields: Text, Company 
 Sort by Date 

+ Conditions

Max. 100 rows

 Run Query  Run

Query Result

 Export (MS Excel)  Save as Query Snapshot  Quick Camp

Company	Rep 1	Text	C
Firma 2	Chris Aki	Angebot zu Firma 1	Fi
Firma 2	Chris Aki	Angebot zu Firma 2	Fi
Firma 2	Chris Aki	Angebot zu Firma 5	Fi

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".

Variable
Sorted by: Type[Descending] View

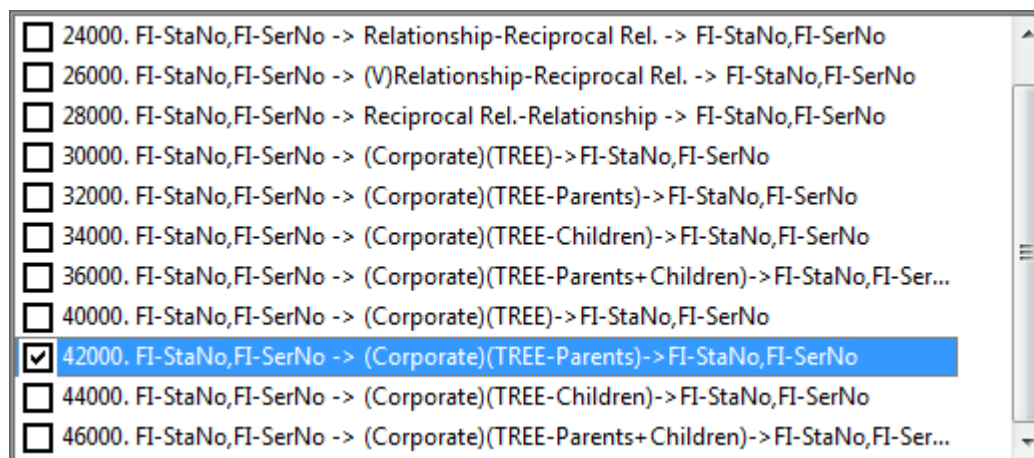
Name	CORE::INDIRECT-PB-LINK-TREE-1	
Description		
Info Area	Relationship	
Field Name	Relationship type	
Type	Condition	Lock <input type="checkbox"/>

Variable Value
Sorted by: (2) Z6-StaNo,Z6-SerNo View

Z6-TenNo		
Stat. No.		
Rep Group ID		
Rep ID		
Language No.		
Login role		
Country		
Condition for info area		
Default		<input type="checkbox"/>

Var. Text	F4='Corporate{{0}}'	
Var. Number/Catalog		
Var. Rep ID		
Var. Date		
Var. Time (s)		
Var. Decimal		
Var. Logical		<input type="checkbox"/>
Link		

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: 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, see [Conditions Applied via Indirect Links](#) in the CRM.core Administrator Guide.

OTC with Aurea CRM LSI

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Corporate Structure Links

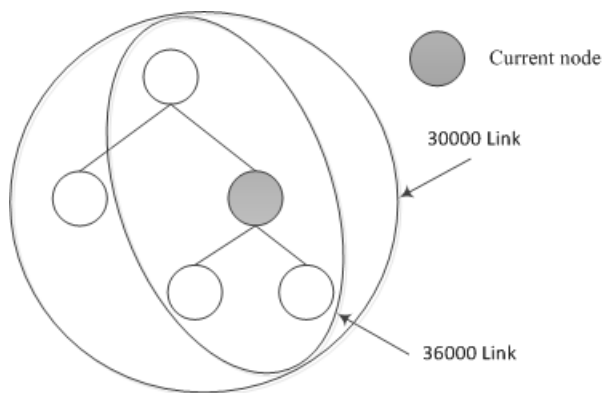
Aurea CRM offers indirect links (via the **Relationship** info area) that can be used to defined queries applied to the corporate structure, for example.

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.

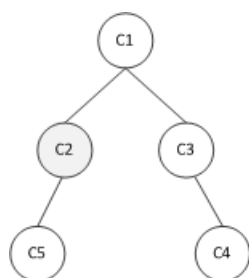
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Example: The corporate structure is defined for five companies. The current rep is entered in the **Rep 1** field of Company 2 (C2). An offer exists for each company.



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.

Company
 Output Fields: Company, Rep 1
 Sort by Company

Rep 1 ID = "Chris Aki"

WITH Offer (36000. FI_StaNo,FI_SerNo -> FI-StaNo,FI-SerNo)
 Output Fields: Text, Company
 Sort by Date

+ Conditions

Max. 100 rows

Run Query Run

Query Result

Export (MS Excel) Save as Query Snapshot Quick Camp

Company	Rep 1	Text	C
Firma 2	Chris Aki	Angebot zu Firma 1	Fi
Firma 2	Chris Aki	Angebot zu Firma 2	Fi
Firma 2	Chris Aki	Angebot zu Firma 5	Fi

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.

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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".

Variable
Sorted by: Type[Descending] View

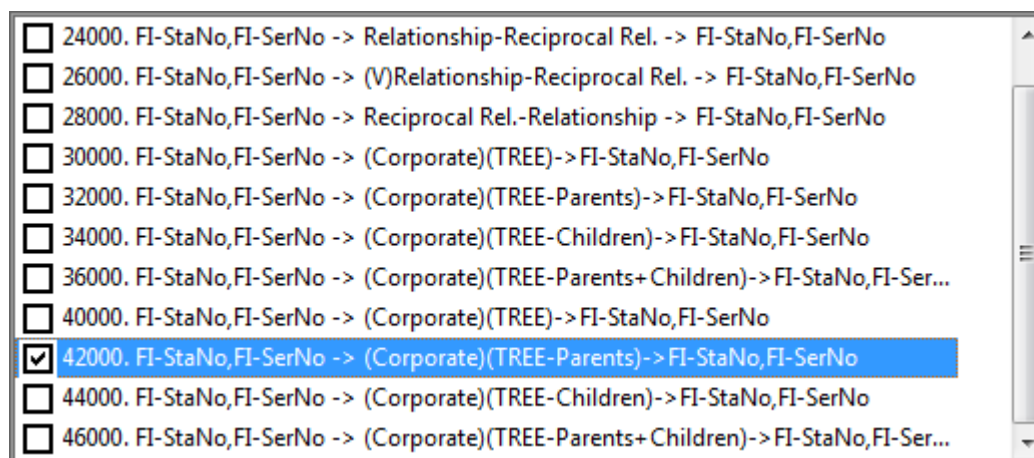
Name	CORE::INDIRECT-PB-LINK-TREE-1	
Description		
Info Area	Relationship	
Field Name	Relationship type	
Type	Condition	Lock <input type="checkbox"/>

Variable Value
Sorted by: (2) Z6-StaNo,Z6-SerNo View

Z6-TenNo		
Stat. No.		
Rep Group ID		
Rep ID		
Language No.		
Login role		
Country		
Condition for info area		
Default		

Var. Text	F4='Corporate{{0}}'	
Var. Number/Catalog		
Var. Rep ID		
Var. Date		
Var. Time (s)		
Var. Decimal		
Var. Logical		
Link		

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: 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

The affiliation view allows you to display data concerning other customers that are flagged as being affiliated with the current customer.

By default, only child data added for the current customer (person, company) is displayed. 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  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: 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.

Note: You can define filters to restrict which data is displayed, see [Select Affiliates \(Button and Dialog\)](#) in the Aurea CRM web Administrator Guide.

Note: 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

2, 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).

Note: 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, see [Alternative Condition for Affiliation View](#) in the Aurea CRM web Administrator Guide.

Example:

Tickets displayed for a customer in the default view:

Related Data

[Tickets](#) × [Persons in Company](#) × [Activities](#) × [Opportunities](#) × [Offers](#) × [Orders](#) × [Installed Bas...](#)

No.	Priority	Subject	Status	Created on	End Customer C...	Problem	Processed
123	Medium	Problem	Open	05.03.2014	SunTea	Maintenance	Kazuko Kar...

Tickets displayed for a customer in the affiliation view, including tickets added for all affiliates.

Related Data

[Tickets](#) × [Persons in Company](#) × [Activities](#) × [Opportunities](#) × [Offers](#) × [Orders](#) × [Installed Bas...](#)

No.	Priority	Subject	Status	Created on	End Customer C...	Problem	Processed
123	Medium	Problem	Open	05.03.2014	SunTea	Maintenance	Kazuko Kar...
1...	High	! Betreff	Open	23.04.2014	AkiComp	Approval too late	Chris Aki...
456	High	! Folgep...	Open	05.03.2014	BemComp	Approval too late	Simon Eder...


The affiliation view is available in lists, queries, the timeline and the tree view.

Note: 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.

Note: 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), see [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.

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.

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):

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:

For a more detailed description of the available links, see [Affiliations](#) and [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.

<ul style="list-style-type: none"> Person Output Fields: First Name
<ul style="list-style-type: none"> First Name = "Mama"
<ul style="list-style-type: none"> WITH Activity (24000. PE_StaNo,PE_SerNo -> PE-StaNo,PE-SerNo) Output Fields: Subject
<ul style="list-style-type: none"> + 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).

☰ **Person**
 Output Fields: First Name

☰ **First Name** = "Mama"

☰ WITH **Activity** (26000. 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 Son
Mama	Activity for Daughter 1

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.

Relationship
 Output Fields: Relationship type, Relationship, Person

Relationship = "is parent of"

WITH **Activity** (900. FI_StaNo,FI_SerNo,PE_StaNo,PE_SerNo -> FI_StaNo,FI_SerNo,PE_StaNo,PE_SerNo)
 Output Fields: Subject

+ Conditions

Max. 100 rows

Run Query Run

Query Result

Export (MS Excel) Save as Query Snapshot Quick Camp

Relationship...	Relationship	Person	Subject
family	is parent of	Mr. Sunny Mia	Activity for Mother
family	is parent of	Ms. Dotty Mia	Activity for Mother
family	is parent of	Ms. Peggy Sue Mia	Activity for Mother

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.

Relationship
 Output Fields: Relationship type, Relationship, Person

Relationship = "is parent of"

WITH **Activity** (920. FI_StaNo,FI_SerNo,PE_StaNo,PE_SerNo -> FI_1_StaNo,FI_1_SerNo,PE_1_StaNo,PE_1_SerNo)
 Output Fields: Subject

+ Conditions

Max. 100 rows

Run Query Run

Query Result

Export (MS Excel) Save as Query Snapshot Quick Camp

Relationship...	Relationship	Person	Subject
family	is parent of	Mr. Sunny Mia	Activity for Son
family	is parent of	Ms. Dotty Mia	Activity for Daughter 2
family	is parent of	Ms. Peggy Sue Mia	Activity for Daughter 1

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  (**Administration**) > **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  (**Administration**) > **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: 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.

Note: 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:

Note: 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.







Note: 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:

- Click on **Portfolio sector description** and then on **+** (**New**).
- 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).
- 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 |
  Print |
 

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.

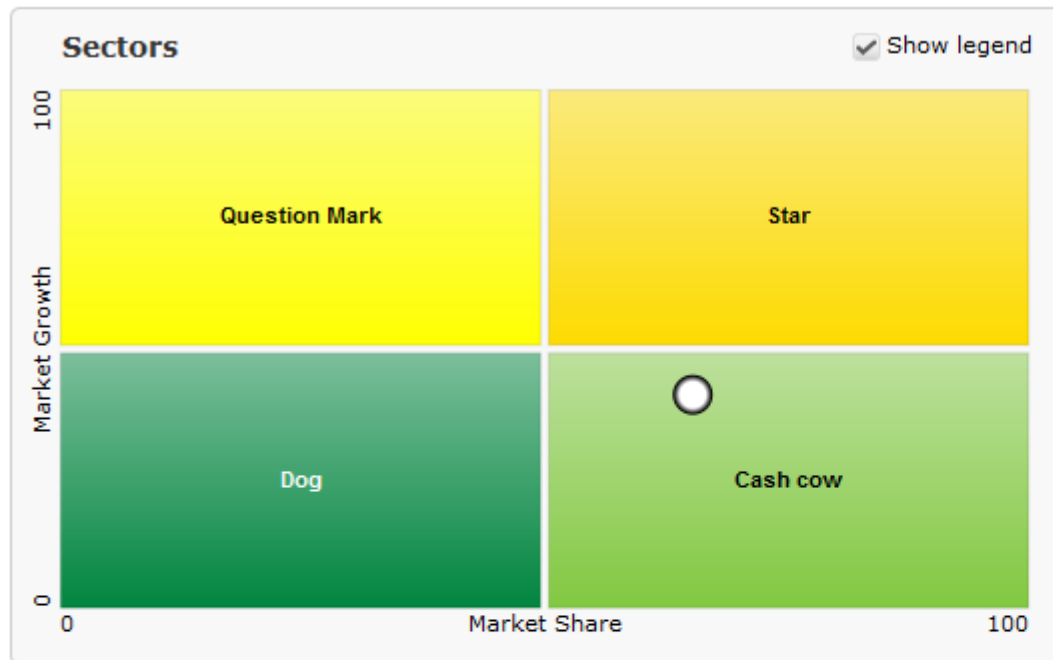
Assigning Portfolios and Classifying Customers

To assign a portfolio to a record:

- Switch to the desired record (e.g. a company or opportunity).
- Select **New > New Portfolio** from the context menu.
- 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):

Portfolio Market position linked to Company Krist Aut AG



Result

Hold the company!

Dog

Cash cow

Question mark

Star

Display all questions

Show mandatory questions only

Summary

Summary

Business area

- Travel Agents

Does the amount business vary from season to season?

- No

How many employees does the business have?

50-100

- 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.

- Save.

- The result is written to the **ABC** field in the record the portfolio was started from (or another field if defined in the portfolio).


Portfolio Configuration

Use the **Portfolio Configuration** info area to determine how many rows and columns (X and Y axes) your portfolio contains. The sum total of all column widths and row heights should be 100%. If the sum total is less than 100%, the columns and rows are increased accordingly; if the value is above 100%, additional columns and rows are not displayed.

You can assign a color to each sector. If you do not assign any colors, colors are assigned by the system (up to 20). If your portfolio contains more than 20 sectors, the colors are reused.




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1. Click on **Start Search** and then on  (**New**).
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5. Save the record.

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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.

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Note: 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.








Note: 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.

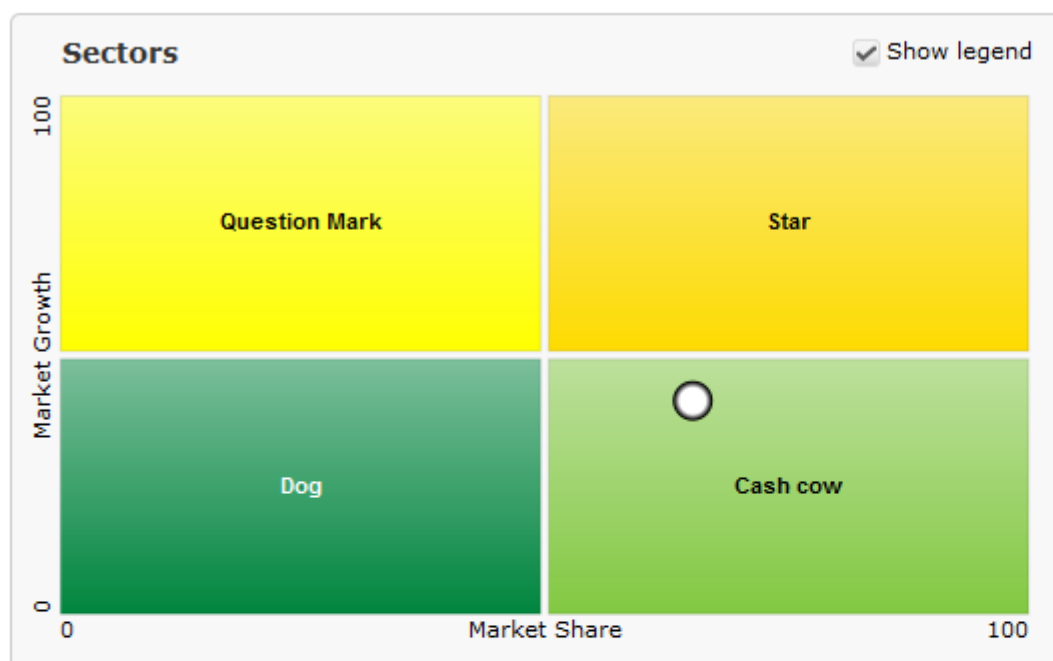
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Display all questions

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Summary

Summary

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Does the amount business vary from season to season?

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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).

Miscellaneous

Miscellaneous 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: 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, see *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 can 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.

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.

Departments

You can define departments in the **Department** info area, and assign employees at a company to a department using the **Department** field in the person in company record. The number of employees entered in a department record is generally higher than the number of persons in your database assigned to the department, as not all employees is among your contact persons.

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:

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Product Group is empty	Changes to the lead status of a company or person
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Note: 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.

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.

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3

Appointment Management

Appointment Management

Appointment management supports you in collaborating efficiently within your company and with your customers.

Below is the list of tasks you can perform with appointment management:

- Display an overview of your appointments in the calendar.
- Display, edit and delete appointments.
- Use filters to determine which appointments are displayed in the calendar.
- Handle conflicting appointments.
- Send and reply to e-mails from appointments.
- Store information such as absences.
- Use tasks, reminders and To-Dos to structure your work.
- Schedule customer visits in the daily and weekly planning view.
- Display the availability of reps in the resource view.

Calendar

Use the calendar to display activities, tasks, absences and To-Dos.

To open the calendar:

1. Select  (Collaboration) > Calendar.

The screenshot shows a calendar interface for the week of January 7-13, 2013. The view is set to 'Work Week'. The left sidebar displays 'My Next Activities' and 'My Next Tasks' with due dates. The main calendar area shows appointments for Monday, Tuesday, Wednesday, and Thursday. The appointments are color-coded and use different icons to represent different types of activities.

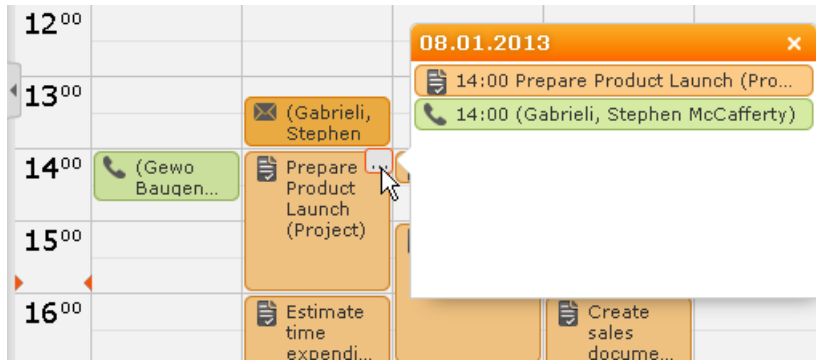
Time	Mon 07.01.2013	Tue 08.01.2013	Wed 09.01.2013	Thu 10.01.2013
07:00				
08:00				
09:00		(Öst. Biathlon... Simon)		
10:00				(AkiCo...)
11:00	(Gewo)	(ÖSV, Simon Fder)		Business lunch (update software AG, Simon)
12:00				
13:00		(Gabrieli, Stephen)		
14:00	(Gewo Baueng...)	Prepare Product Launch (Project)	Estimate	Create marketi... brochur... (Sub-Pr...)
15:00			Create docume... (Sub-Pr...)	
16:00		Estimate time expendi... (Sub-Pr...)		Create sales docume... (Sub-Pr...)
17:00	(AkiCo...)			
18:00				

- 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).

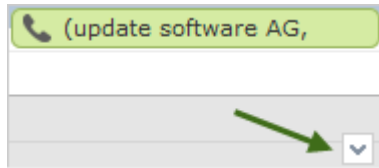
The screenshot shows a calendar interface for the week of January 21-22, 2013. The view is set to 'Work Week'. The left sidebar displays 'My Next Activities' and 'My Next Tasks' with due dates. The main calendar area shows appointments for Monday, Tuesday, Wednesday, and Thursday. The appointments are color-coded and use different icons to represent different types of activities.


Time	Mon 21.01.2013	Tue 22.01.2013
07:00		
		Project Installation (upd...)

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



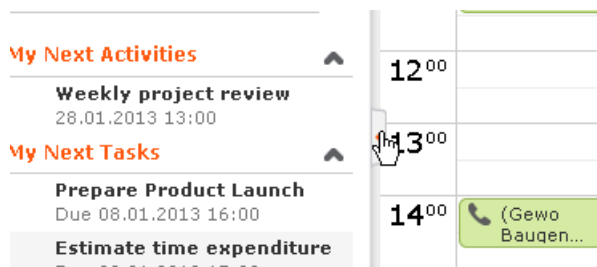
- Only a limited number of appointments can be displayed per day in the monthly view. Click on **+ x more** to display all the appointments in a separate window.
- If appointments have been entered that cannot be displayed in the visible area, the following icon is displayed at the bottom edge of the 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.

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

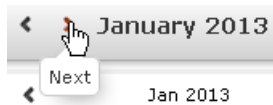


- Holidays are color-coded. To determine which holiday calendar you wish to use, click on  (**Settings**) > **User Configuration**.
- If the time zone used by your device is changed (automatically or manually), you can determine that Aurea CRM takes the current time zone into account (provided you have the necessary access rights). You need to close and restart your web browser to display the new time zone in the calendar.

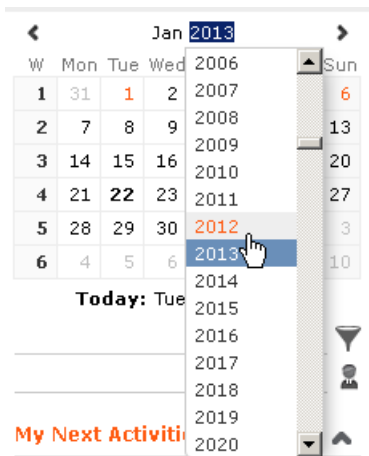
Navigating in the Calendar


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.



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. Your administrator can determine which types of appointments are checked for conflicts.

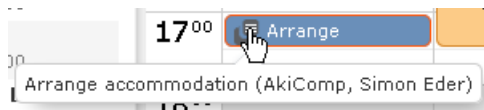
You can also add an activity for yourself as follows:

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 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.

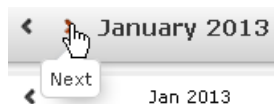
To delete an appointment:

- Select the appointment in the calendar and press the Delete key on your keyboard. Hold down **Ctrl** while clicking to select multiple appointments to delete at once.
- Select **Delete** from the context menu.

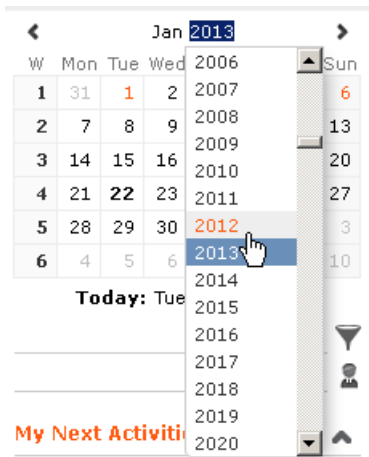
Navigating in the Calendar


You can navigate in the calendar using the following options:

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




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



- Use the arrows to move forward or back one month
- When in the day view, hold down Ctrl and click on days in the calendar to display multiple days at once.
- Click on **Today** to display the current date in the day view.
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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, >> on page 144.



3. When adding an activity, select the company or person to add the activity for.
4. Enter the details and save.

Note: 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, >> on page 144. 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.

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- 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, >> on page 144 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.
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.

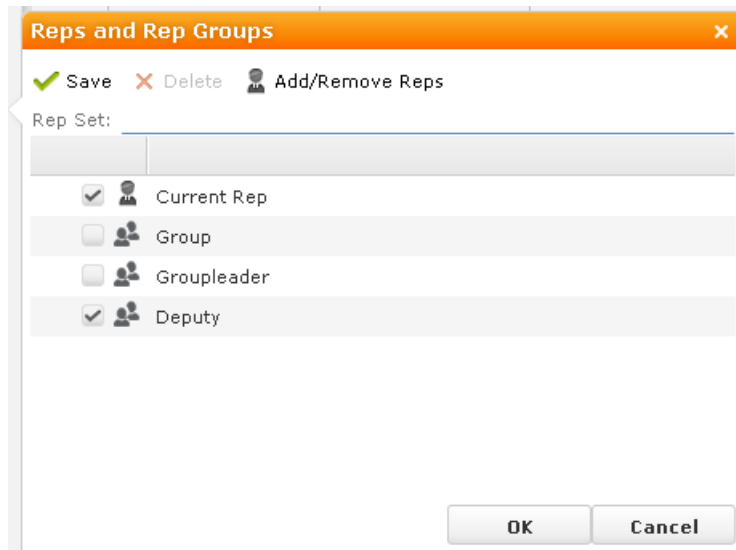
Note: The first value in the drop-down list has no name; however you can select this entry and change its settings. Changes made to this entry are saved automatically. To delete a filter set, select the desired filter from the drop-down list, click on  (**Define Filters and Filter Sets**) and then click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

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, >> on page 84.
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: 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**.

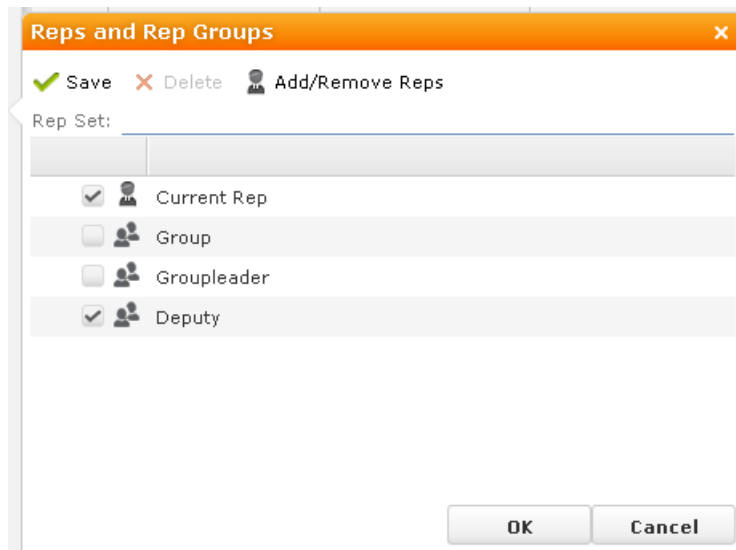
5. Click on **OK**.

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, >> on page 67.

- 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.

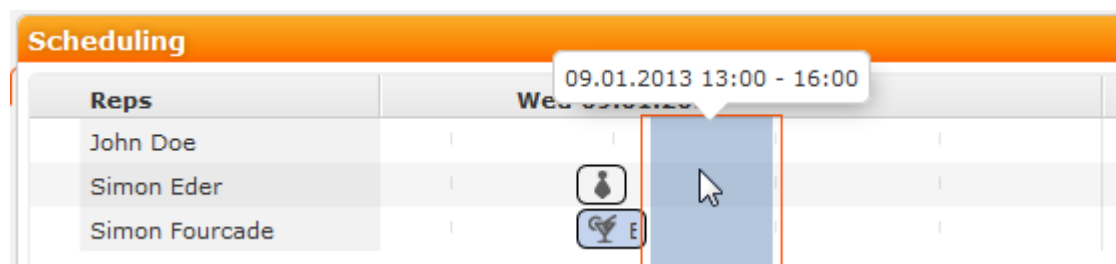
Note: Note: The first value in the drop-down list has no name; however you can select this entry and change its settings. Changes made to this entry are saved automatically. To delete a rep filter set, select the desired filter from the drop-down list, click on  (**Reps and Rep Groups**) and then click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

5. Click on **OK**.

Appointment Planning

Learn how to plan appointments.

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.



Enable the check for conflicting appointments in the user settings. 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

Learn about the different types of appointments.

Activities are used to store details regarding contact with customers.

Tasks allow you to store tasks, e.g. what needs to be completed within the scope of projects (which may be customer-independent).

Absence allow you to store absence, e.g. sick leave, vacations, visits to doctors.

Activities

You can add participants to activities and determine their participation type and status.

To add a reminder for an activity, enter values in the **Reminder duration** and **Reminder unit** fields on the **Details** tab.

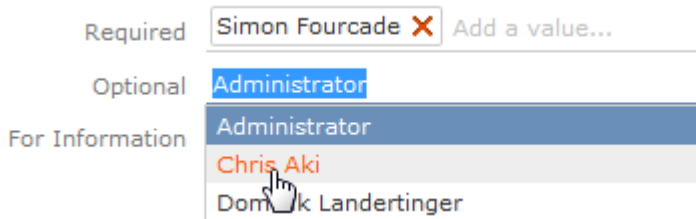
For example, if you enter "5 Min", the reminder is displayed for all participants 5 minutes before the activity is due to start.

Adding Participants

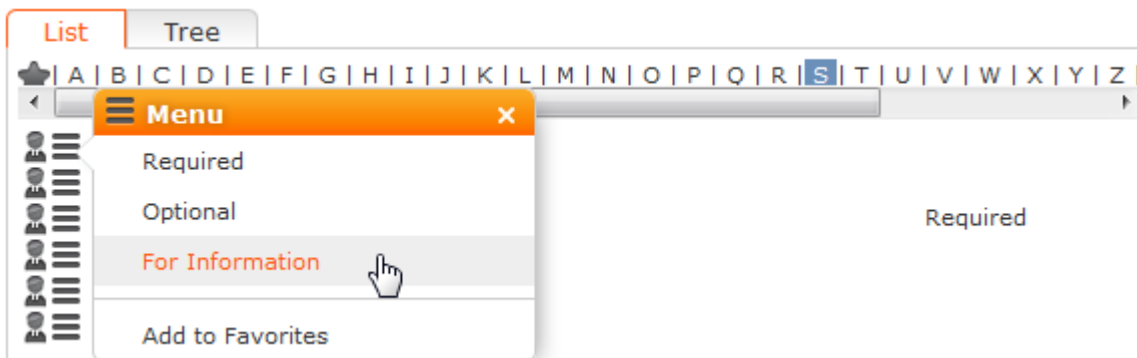
To add participants to an activity:

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. 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.

3. Save the record. The new activity is linked to the previous activity via the **Previous/Main Activity** field.


Recurring Activities

You can add recurring activities that take place at regular intervals.

You can determine the frequency (e.g. daily, weekly, monthly or yearly) in the first activity (the main activity), from which you can then generate the remaining appointments.

Adding Recurring Activities

To add a series of recurring activities:


1. Add the first (main) activity.
2. Click on  (**Recurrence**).

The **Appointment Recurrence** window is displayed.

3. Determine the whether the activities should recur on a **Daily**, **Weekly**, **Monthly** or **Yearly** basis.
4. Depending on your settings, you can determine when the activity is repeated:
 - **Daily**: The number of days before the activity is repeated.
 - **Weekly**: The number of weeks before the activity is repeated and the day of the week. You can select multiple weekdays.
 - **Monthly**: The number of months before the activity is repeated; the day of the month; the day of the week.
 - **Yearly**: The number of years before the activity is repeated; the day and month; the day of the week.

When repeating activities on a monthly or yearly basis, enable **Do not create substitute activities** to prevent activities that would fall on a holiday or weekend from being moved to the next work day.

5. Enable the **Weekends** and **Holidays** options if activities should also be added on holidays or weekends.
6. Define the **Series duration**:
 - **Ends after**: The number of recurring appointments after which the series ends.
 - **Ends on**: Date on which the series should end.
7. Save the data.

The activities are generated. Recurring activities are indicated using the  icon.

Note: The following fields are **not** transferred from the main activity to subsequent activities: **Response 1-5 (Marketing Act.)**, **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 are asked whether you wish to apply your changes to just the one activity or to the remaining activities in the series starting from the current activity.

Note: Fields that are not transferred from the main activity to other activities in the series are not transferred when applying these changes.

3. Select the desired option and confirm with **OK**.

Displaying the Main Activity of a Series

To display the main activity of a series:

1. Select  (**Collaboration**) > **Activities** to display activities in list view and search for an activity in the series.
2. Select **Main Record in Series** from the context menu. The main activity is displayed.

Deleting Activities in a Series

To delete one or more activities that are part of a series of recurring activities:

1. Select **Delete** from the activity's context menu.

You are asked what you wish to delete:

- Just this activity
- This activity and all subsequent activities
- The entire series

Note: If you have chosen to delete the main activity, you can only choose to delete the entire series.

2. Choose the desired option and confirm with **OK**.


Editing the Recurrence Pattern

To edit the recurrence pattern of an entire series:

1. Click on  (**Recurrence**) in the main activity record.
2. Edit the recurrence pattern and click on **Save**.

The activities in the series are deleted and new activities are generated based on the new settings. The main activity is not deleted.

To edit the recurrence pattern for part of a series:

1. Open the activity in the series from which point on you wish to change the recurrence pattern.
2. Click on  (**Recurrence**).
3. Edit the recurrence pattern and click on **Save**.

A message is displayed informing you that this activity is part of a series of activities, and you are asked if you wish to use the activity as the main activity of a new series.

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 an activity's participants**:

1. Enter the subject of the e-mail in the **Subject** field and the e-mail's text in the **Text** field in the activity.

Note: Your administrator can determine that buttons are available to format the HTML text.

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 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.

Notifying Reps

You can send an e-mail to all an activity's **internal participants**, e.g. if you need to reschedule the appointment.

To notify the reps:

1. Select **Notify Recipients** from the context menu of the activity.

If your administrator has determined that e-mails are sent from your e-mail client, your e-mail client is opened. If e-mails are sent by via the Aurea CRM server, the following window opens:

Notify about record

You can send this record to any other rep and/or external recipient. Please specify what you want to send:

Recipients:

- Simon Eder ([redacted])
- John Doe (j.doe@test.com)
- Ms. Chris Aki ([redacted])

CC:

- [redacted] ([redacted])

Additional internal recipients:

Additional external recipients:

Subject:
Rescheduling

Body:
Unfortunately we have to reschedule for 17:00 due to the room being booked until 16:45/

kind regards,
Arthur

Insert update CRM web link

Request a delivery receipt

2. Enable the check boxes next to the persons you wish to notify under **Recipients**.
3. You can add additional recipients to the **Additional internal recipients** and **Additional external recipients** fields.
4. The contents of the **Subject** and **Text** fields in the activity are transferred to the e-mail, but you can still edit them in the e-mail.
5. Use the following check boxes to carry out the corresponding action: **Insert Aurea CRM web link**, **Insert Aurea CRM win link**, **Request a delivery receipt**, **Request a read receipt**. Your administrator is responsible for defining which options are available.
6. If your administrator has enabled the corresponding option, click on **Insert Signature** to insert your e-mail signature.



7. The documents linked to the activity are added as attachments.


Note: Your administrator can determine that certain types of files or files exceeding a certain size are not sent. When sending e-mails from your e-mail client, no attachments can be added.




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


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.

 **28.01.2013 15:40: E-mail for Simon Eder (Gewo Baugenossenschaft)**

Menu | Edit | Save | Cancel | Recurrence... | **Send as E-Mail** | Reply |   

Activity Type  E-mail Status **Scheduled**

Date **28.01.2013** End Date


Time **15:40** End Time

Priority **High** Create To-Do



Result Private

Subject **RE:**

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

Rep ID **Simon Eder**  Assigned by Rep ID


Participant ID

Required **Simon Eder**  **Miranda Meyer**  Add a value...

Optional Add a value...

For Information Add a value...

Text **@Miranda, do you also want to be present? I'm thinking the 15th would be a good day|..**
 ----- Original Message 13.12.2012 -----
 Dear Simon,
 As discussed, we should arrange an appointment in order to finalize the details of the project.
 kind regards,

5. Click on  (**Send as E-mail**). The e-mail is sent to all reps and companies/persons added as participants.

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:

Required: Simon Fourcade ✖ Add a value...

Optional: Administrator

For Information: Administrator
Chris Aki
Domk Landertinger

- 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, >> on page 67. 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: Note: Your administrator can define which field values are automatically transferred from the previous activity.

3. Save the record.

The new activity is linked to the previous activity via the **Previous/Main Activity** field.


Recurring Activities

You can add recurring activities that take place at regular intervals.

You can determine the frequency (e.g. daily, weekly, monthly or yearly) in the first activity (the main activity), from which you can then generate the remaining appointments.

Adding Recurring Activities

To add a series of recurring activities:

1. Add the first (main) activity.
2. Click on  (**Recurrence**).

The **Appointment Recurrence** window is displayed.

Appointment Recurrence
✕

Recurrence pattern

Daily Every 1 week(s) on:
 Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

Include

Weekends
 Holidays

Series duration

Ends after 10 occurrences
 Ends on

Delete Recurrence


Save

Cancel

3. Determine the whether the activities should recur on a **Daily**, **Weekly**, **Monthly** or **Yearly** basis.
4. Depending on your settings, you can determine when the activity is repeated:
 - **Daily**: The number of days before the activity is repeated.
 - **Weekly**: The number of weeks before the activity is repeated and the day of the week. You can select multiple weekdays.
 - **Monthly**: The number of months before the activity is repeated; the day of the month; the day of the week.
 - **Yearly**: The number of years before the activity is repeated; the day and month; the day of the week.

When repeating activities on a monthly or yearly basis, enable **Do not create substitute activities** to prevent activities that would fall on a holiday or weekend from being moved to the next work day.

5. Enable the **Weekends** and **Holidays** options if activities should also be added on holidays or weekends.
6. Define the **Series duration**:
 - **Ends after**: The number of recurring appointments after which the series ends.
 - **Ends on**: Date on which the series should end.
7. Save the data.

The activities are generated. Recurring activities are indicated using the  icon.

Note: 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: Note: Fields that are not transferred from the main activity to other activities in the series are not transferred when applying these changes.

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: 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 an activity's participants**:

1. Enter the subject of the e-mail in the **Subject** field and the e-mail's text in the **Text** field in the activity.

Note: Note: Your administrator can determine that buttons are available to format the HTML text.

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: 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.

Notifying Reps

You can send an e-mail to all an activity's **internal participants**, e.g. if you need to reschedule the appointment.

To notify the reps:

1. Select **Notify Recipients** from the context menu of the activity.

If your administrator has determined that e-mails are sent from your e-mail client, your e-mail client is opened. If e-mails are sent by via the Aurea CRM server, the following window opens:

Notify about record
□ ×

You can send this record to any other rep and/or external recipient. Please specify what you want to send:

Recipients:

Simon Eder ([redacted])

John Doe (j.doe@test.com)

Ms. Chris Aki ([redacted])

CC:

[redacted] ([redacted])

Additional internal recipients: [person icon]

Additional external recipients:

Subject:

Rescheduling

Body:

Unfortunately we have to reschedule for 17:00 due to the room being booked until 16:45/

kind regards,
Arthur

Insert update CRM web link

Request a delivery receipt



2. Enable the check boxes next to the persons you wish to notify under **Recipients**.
3. You can add additional recipients to the **Additional internal recipients** and **Additional external recipients** fields.
4. The contents of the **Subject** and **Text** fields in the activity are transferred to the e-mail, but you can still edit them in the e-mail.
5. Use the following check boxes to carry out the corresponding action: **Insert Aurea CRM web link**, **Insert Aurea CRM win link**, **Request a delivery receipt**, **Request a read receipt**. Your administrator is responsible for defining which options are available.
6. If your administrator has enabled the corresponding option, click on **Insert Signature** to insert your e-mail signature.
7. The documents linked to the activity are added as attachments.


Note: Note: Your administrator can determine that certain types of files or files exceeding a certain size are not sent. When sending e-mails from your e-mail client, no attachments can be added.





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


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.

 **28.01.2013 15:40: E-mail for Simon Eder (Gewo Baugenossenschaft)**



Menu | Edit | Save | Cancel | Recurrence... |  Send as E-Mail | Reply |   

Activity Type	 E-mail	Status	Scheduled
Date	28.01.2013	End Date	
Time	15:40	End Time	
Priority	High	Create To-Do	<input type="checkbox"/>
Result		Private	<input type="checkbox"/>
Subject	RE:		

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

Rep ID Simon Eder  Assigned by Rep ID


Participant ID

Required	Simon Eder 	Miranda Meyer 	Add a value...
Optional	Add a value...		
For Information	Add a value...		

Text @Miranda, do you also want to be present? I'm thinking the 15th would be a good day|..
----- Original Message 13.12.2012 -----
Dear Simon,

As discussed, we should arrange an appointment in order to finalize the details of the project.

kind regards,

5. Click on  (**Send as E-mail**). The e-mail is sent to all reps and companies/persons added as participants.

Tasks

Learn about task appointment types.

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, >> on page 151.
- 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.

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

Learn how to enable approval for absences and add reminder for it.

To determine that an absence should be approved, 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 informing 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, 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 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.

A work order is linked to a company/person.

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.

Note: Work orders are not displayed in the calendar.

Work orders can also be generated within the scope of marketing activities.


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 menu, see [Rights](#) in the CRM.core Administrator Guide.

Note: 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**.

Note: 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. 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.

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, >> on page 273. 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.



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- **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 and account managers. Your administrator can define additional search options, see [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, these times are colored white in the calendar.

The activity is added with the activity default values your have defined. (**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).

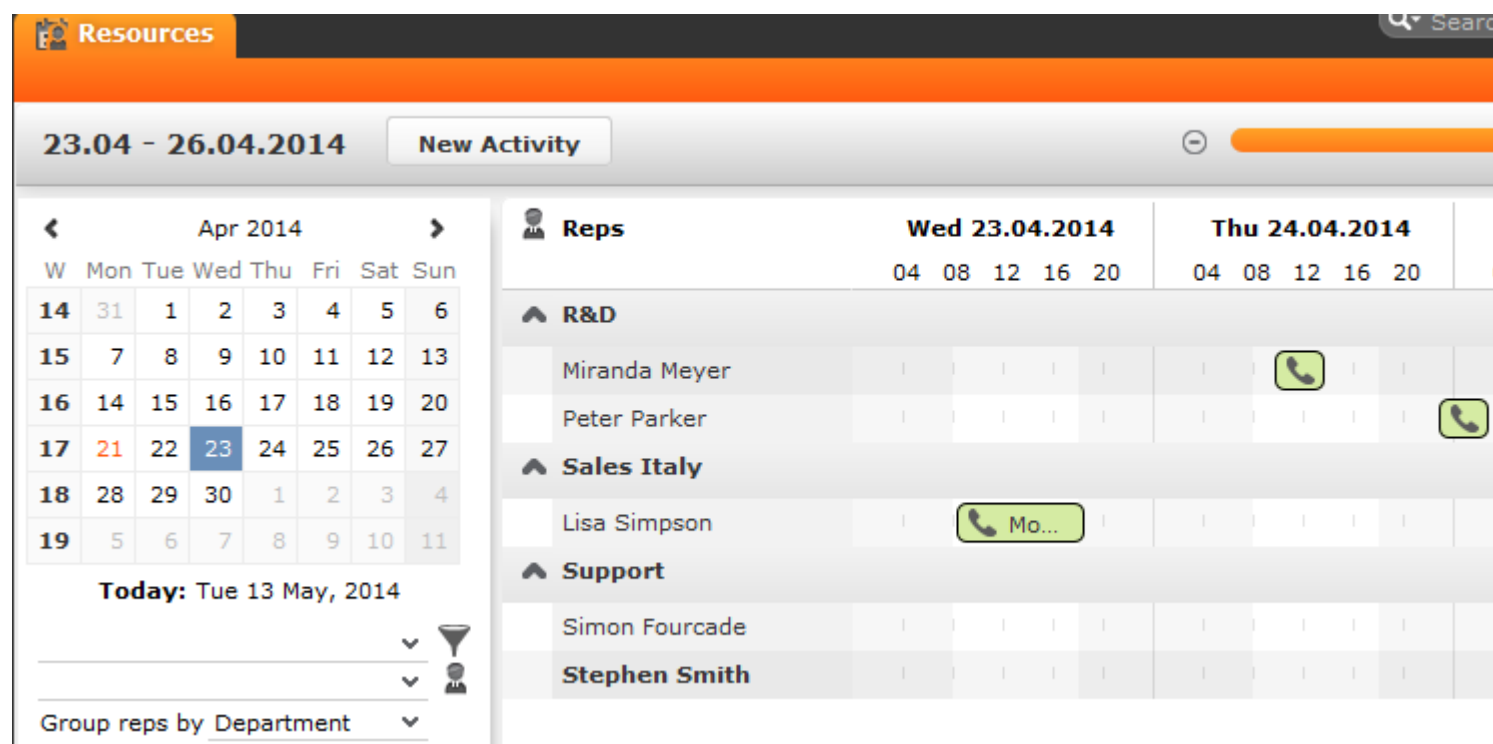
6. The other functions in the daily & weekly planning area (e.g. filters, switching views) function the same as in the calendar.
7. Click on  (**Calendar**) to switch to the calendar.

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, select  (**Collaboration**) > **Resources**.



Resources Search

23.04 - 26.04.2014 New Activity

Apr 2014							
W	Mon	Tue	Wed	Thu	Fri	Sat	Sun
14	31	1	2	3	4	5	6
15	7	8	9	10	11	12	13
16	14	15	16	17	18	19	20
17	21	22	23	24	25	26	27
18	28	29	30	1	2	3	4
19	5	6	7	8	9	10	11

Today: Tue 13 May, 2014

Group reps by Department

Reps	Wed 23.04.2014					Thu 24.04.2014				
	04	08	12	16	20	04	08	12	16	20
R&D										
Miranda Meyer										
Peter Parker										
Sales Italy										
Lisa Simpson										
Support										
Simon Fourcade										
Stephen Smith										

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

Customizing the Resource View

You can customize the resource view as follows:

- Display the sidebar if it is currently hidden by clicking on the arrow:



- To configure the time period that is displayed:
 - Click on the desired day or start of the time period in the small calendar in the sidebar.
 - Select the time period that is displayed using the slider in the header or by clicking on the + and minus icons:



- Click on the header and drag it left or right to scroll:



Reps	Thu 01.05.2014	Fri 02.05.2014
	04 08 12 16 20	04 08 12 16 20
Stephen Smith		

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

Note: At most 50 reps and 5,000 activities can be displayed. If your filters return more reps or activities, a message is displayed informing you that not all records can be displayed. Either refine your filter criteria or display a shorter time period.

- Select one or more reps displayed in the view (hold down Ctrl) and select **Remove Rep** from the context menu to remove the rep(s) from the view.
- You can select additional criteria used to group reps from the **Group reps by** drop-down list, e.g. **Department** (Org. Group ID field in the rep record), **Country** or **Skill** or **No grouping**.

Note: Reps of the type "Resource" are displayed within a group at the end of the group's entries.


- Click in the **Reps** column in the header to sort the reps displayed in the resource view.
- Click on  (**Edit Settings**):
 - Select the **Color Coding** criteria used to color activities. Click on  (**Legend**) to display an overview of the color-coding in the calendar.
 - Determine whether you wish to **Show working hours only**.
 - Enable the **Show group column** option to display reps' groups in a separate column.
 - Enable the **Show hidden items** option to include those appointments whose duration is less than the minimum duration for the selected view. These appointments are only displayed for reference and cannot be edited in the resource view.

Reps		CW 18/Apr 2014						
		28	29	30	1	2	3	4
^ R&D								
	Miranda Meyer							
	Peter Parker							
^ Sales Italy								
	Lisa Simpson			Ⓜ	○			
^ Support								
	Simon Fourcade							
	Stephen Smith							

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

Editing Activities and Absences

You can edit the activities and absences displayed as follows:

- Use the mouse to move activities or absences to a different time.
- Drag the left or right borders of an appointment to change its duration.
- Activities are displayed with a solid frame in the row of the organizer (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.

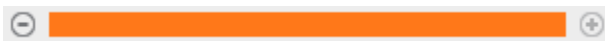
Customizing the Resource View

You can customize the resource view as follows:

- Display the sidebar if it is currently hidden by clicking on the arrow:



- To configure the time period that is displayed:
 - Click on the desired day or start of the time period in the small calendar in the sidebar.
 - Select the time period that is displayed using the slider in the header or by clicking on the + and minus icons:



- Click on the header and drag it left or right to scroll:

Reps	Thu 01.05.2014					Fri 02.05.2014				
	04	08	12	16	20	04	08	12	16	20
Stephen Smith										



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


Note: 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: Note: Reps of the type "Resource" are displayed within a group at the end of the group's entries.


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- Click on  (**Edit Settings**):
 - Select the **Color Coding** criteria used to color activities. Click on  (**Legend**) to display an overview of the color-coding in the calendar.
 - Determine whether you wish to **Show working hours only**.
 - Enable the **Show group column** option to display reps' groups in a separate column.
 - Enable the **Show hidden items** option to include those appointments whose duration is less than the minimum duration for the selected view. These appointments are only displayed for reference and cannot be edited in the resource view.

 Reps	CW 18/Apr 2014						
	28	29	30	1	2	3	4
▲ R&D							
Miranda Meyer							
Peter Parker							
▲ Sales Italy							
Lisa Simpson			Ⓜ	○			
▲ Support							
Simon Fourcade							
Stephen Smith							

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


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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: 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., see [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).

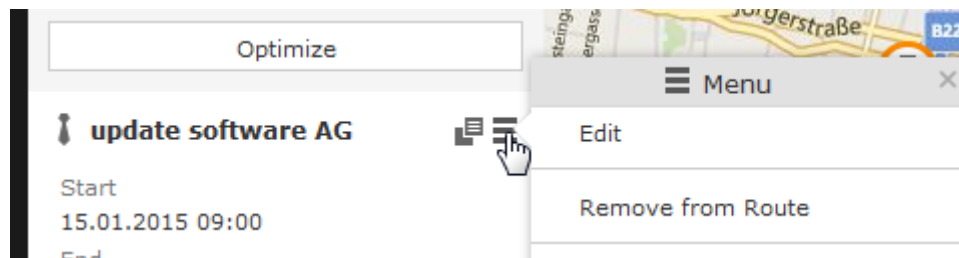
Note: Calculating the route may take a while. By default, the route is created for you. To generate a route for another rep, click on  (**Select Rep**) in the header and select the desired rep. The selected rep is remembered and reused the next time you access the visit planning area. When planning a 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  (**Legend**) to display the legend.
- Select  (**Settings**) >  (**Filter**) to determine which customers are displayed on the map (e.g. companies, persons) and define filters. The system remembers which filters are active and applies them again the next time you open the visit planning area. Filters are applied when generating visit suggestions.

4

Surveys

Surveys

Learn about creating survey questionnaires and evaluating them.


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 Questionnaires

To define a questionnaire:

1. Select  (**Collaboration**) > **Questionnaire**.
2. Click on **Start Search** and then on **+ New**.
3. Click on **+ (Add/Find Catalog Values)** next to the **Questionnaire** field. The **Find or Add Catalog Value** window opens.
4. Enter a name for the questionnaire.
5. Click on **New**.
6. Save.
7. Define the questions and answers used by the questionnaire.

Defining Questions

You need to define the individual questions in the questionnaire and what answers can be given.

- a. Click on **Questions** in the questionnaire's tree view and click on **New**.
- b. Enter the **Question**.

- c. 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. update 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.

- d. 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, the question is automatically set as a mandatory question.

- e. 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.

- 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.

The screenshot shows a web application interface for a customer survey. At the top, there are tabs for 'Calendar' and 'Start Survey', and a search bar. The main title is 'Questionnaire Customer Survey'. Below this, there is a section for 'Contact Person Julian Eberhard' with a profile icon and an upward arrow. The contact information is organized into two columns: 'Form of address' and 'Title'. The first column includes fields for 'First Name Julian', 'Tel 1', and 'Company Gewo Baugenossenschaft'. The second column includes 'Last Name Eberhard', 'Mobile Tel.', 'Postal Code', 'City', 'Street', 'Country', and 'E-mail 2'. Below the contact information, there are three tabs: 'Address' (selected), 'Position', and 'Classification'. Further down, there are buttons for 'Display all questions', 'Show mandatory questions only', and 'Summary'. To the right of these buttons are 'Save' (with a green checkmark) and 'Finalize survey' (with a flag icon). Below the buttons, there are three large, rounded buttons for 'Customer information', 'Focus of interest', and 'Concrete and gravel' (which is highlighted with an orange border). To the right of these buttons are two radio button options: 'Section topic' and 'Current state'. Below the 'Concrete and gravel' button, the text 'Concrete and gravel' is displayed in orange. The main content area contains two questions with radio button options: 'Together with our partner Stranag we develop sustainable product solutions for the construction industry. Do you know Stranag?' and 'Can you name a contact person for more information on our offers in the concrete and gravel area?'. Both questions have 'Yes', 'No', and 'No response' options, with 'No response' selected. At the bottom, there is a progress bar showing 'Mandatory Questions: 1 of 1' and 'Progress (depending on answers given): 3 of 13'. Finally, there are two buttons: 'Previous Section' and 'Next Section'.

- 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.

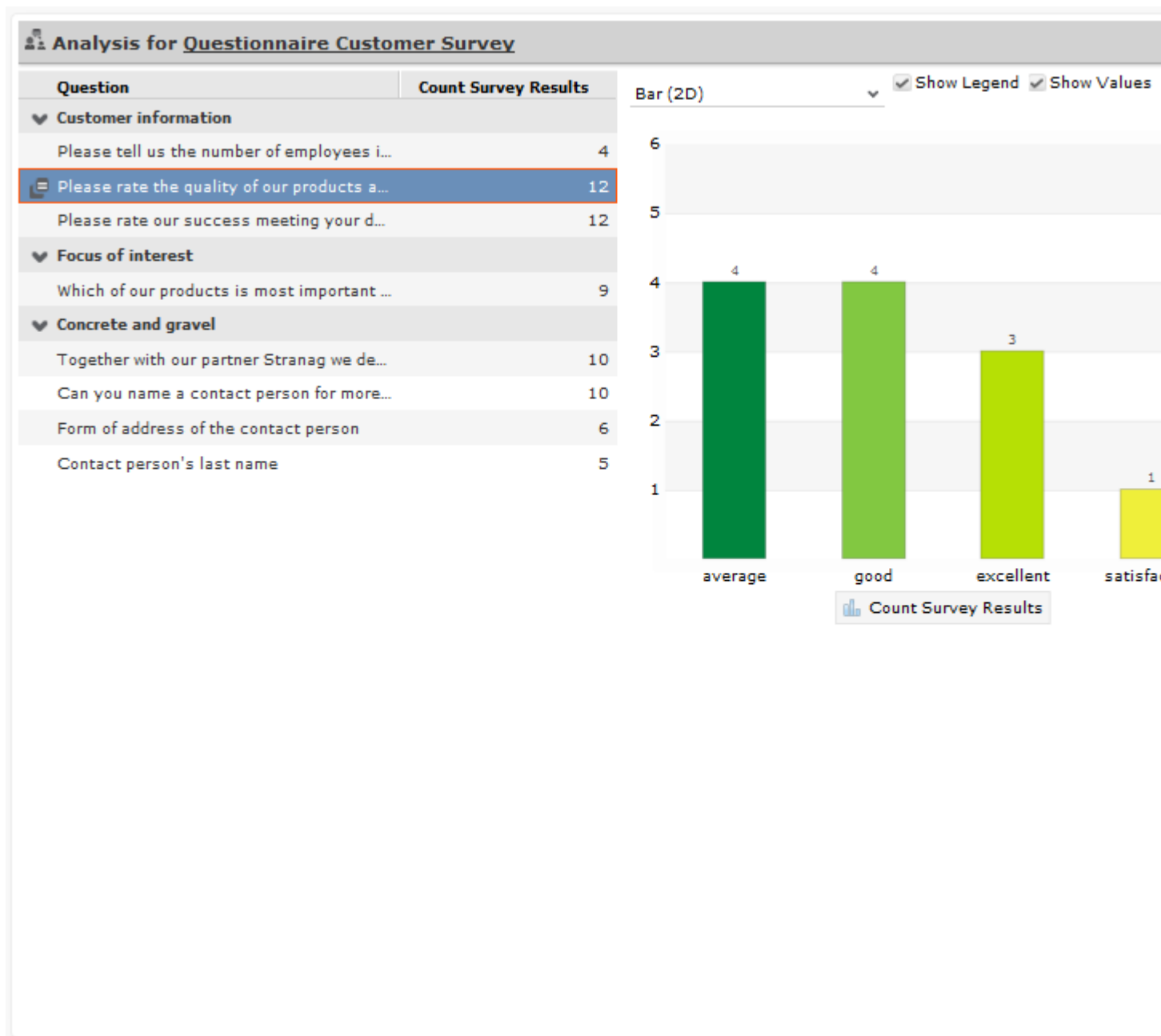
Depending the questionnaire's configuration, records may be added to the Aurea CRM database or existing records may be updated automatically based on the answers you entered.

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.

Search Surveys linked to Contact Person Tobias Eberhard

Date
 + Add more ... With me

Max. 15 Records / Page


Search Results << < 1 - 1 of 1 > >>

 Person	Questionnaire/Portfolio	Date	Rep	Result ...	Ma
  <u>Tobias Eberhard</u>	<u>Customer Survey</u>	06.02.2013	Simon Eder		

Related Data

Survey Responses

Survey Responses << < 1 - 7 of 7 > >> ↳ Display All R

 Questionnaire/Portf...	Question	Answer	Text
<u>Customer Survey</u>	<u>33 - Which of our products is most important for you?</u>	<u>2 - Bituminous mastic</u>	
<u>Customer Survey</u>	<u>22 - Please rate the quality of our products and services (1 = ex...</u>	<u>3 - average</u>	
<u>Customer Survey</u>	<u>41 - Together with our partner Stranaq we develop sustainable pr...</u>	<u>2 - No</u>	
<u>Customer Survey</u>	<u>23 - Please rate our success meeting your deadlines (1 = very s...</u>	<u>2 - Successful</u>	
<u>Customer Survey</u>	<u>42 - Can you name a contact person for more information on our ...</u>	<u>1 - Yes</u>	
<u>Customer Survey</u>	<u>43 - Form of address of the contact person</u>		Frau
<u>Customer Survey</u>	<u>44 - Contact person's last name</u>		Reiter

<< < 1 - 7 of 7 > >>


The **Result (%)**, **Max. Points** and **Points Attained** columns are calculated from the answers given by the person (taking into account the weighting).

- Click on a survey in the list of results to display the answers the person gave.

Defining Questionnaires

Learn to define question and answers for Questionnaires.

To define a questionnaire:

1. Select  (**Collaboration**) > **Questionnaire**.
2. Click on **Start Search** and then on **+ New**.
3. Click on **+ (Add/Find Catalog Values)** next to the **Questionnaire** field. The **Find or Add Catalog Value** window opens.
4. Enter a name for the questionnaire.
5. Click on **New**.
6. Save.
7. Define the questions and answers used by the questionnaire.

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: Note: If you do not enter a number, the questions are displayed in the order they were added when filling out the questionnaire. update 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.

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: 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 (>> on page 162), 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, >> on page 162.

- 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: 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: 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: 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: 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: 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.

The screenshot shows a web browser window with two tabs: 'Calendar' and 'Start Survey'. The main content area is titled 'Questionnaire Customer Survey' and displays contact information for Julian Eberhard. The contact details include:

- Form of address: First Name **Julian**, Last Name **Eberhard**, Title (empty), Tel 1 (empty), Mobile Tel. (empty), Company **Gewo Baugenossenschaft**.
- Address section: Address (highlighted in orange), Position, Classification, Postal Code, Street, City, Country, E-mail 1 (julian.eberhard@gewo.com), E-mail 2 (empty).

 Below the contact information are navigation buttons: 'Display all questions', 'Show mandatory questions only', and 'Summary'. There are also 'Save' and 'Finalize survey' options. A progress indicator shows 'Concrete and gravel' as the current section, with 'Customer information' and 'Focus of interest' as previous sections. The current question is:

Concrete and gravel

Together with our partner Stranag we develop sustainable product solutions for the construction industry. Do you know Stranag?

Yes
 No
 No response

Can you name a contact person for more information on our offers in the concrete and gravel area?

Yes
 No
 No response

 At the bottom, a progress bar indicates 'Mandatory Questions: 1 of 1' and 'Progress (depending on answers given): 3 of 13'. Navigation buttons for 'Previous Section' and 'Next Section' are also present.

- 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.
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- 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.

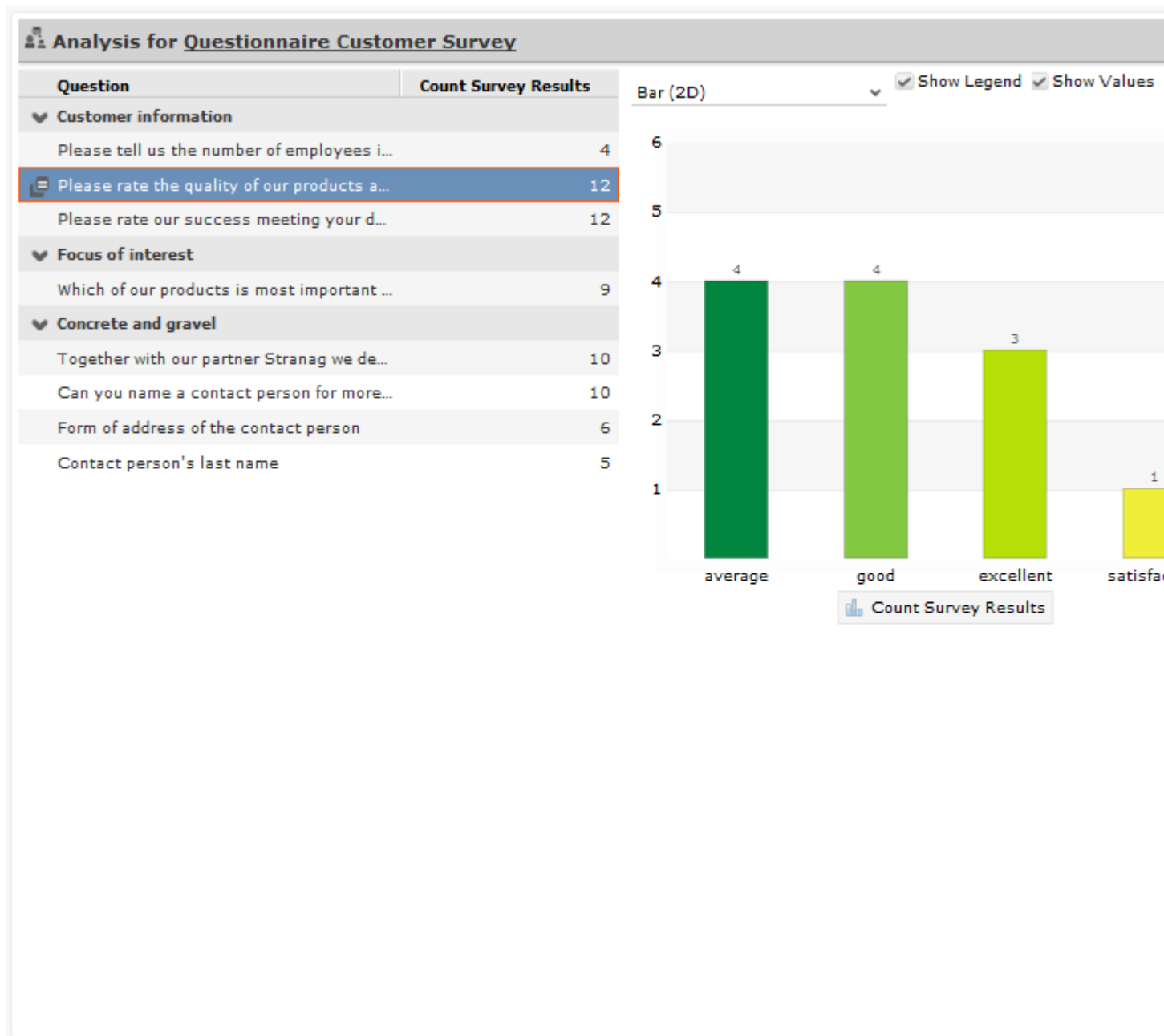
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Displaying the Questionnaires Answered by a Person

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.

Search Surveys linked to Contact Person Tobias Eberhard

Date
 + Add more ... With me

Max. 15 Records / Page


Search Results << < 1 - 1 of 1 > >>

 Person	Questionnaire/Portfolio	Date	Rep	Result ...	Ma
  <u>Tobias Eberhard</u>	<u>Customer Survey</u>	06.02.2013	Simon Eder		

Related Data

Survey Responses x

Survey Responses << < 1 - 7 of 7 > >> ↳ Display All R

 Questionnaire/Portf...	Question	Answer	Text
<u>Customer Survey</u>	<u>33 - Which of our products is most important for you?</u>	<u>2 - Bituminous mastic</u>	
<u>Customer Survey</u>	<u>22 - Please rate the quality of our products and services (1 = ex...</u>	<u>3 - average</u>	
<u>Customer Survey</u>	<u>41 - Together with our partner Stranaq we develop sustainable pr...</u>	<u>2 - No</u>	
<u>Customer Survey</u>	<u>23 - Please rate our success meeting your deadlines (1 = very s...</u>	<u>2 - Successful</u>	
<u>Customer Survey</u>	<u>42 - Can you name a contact person for more information on our ...</u>	<u>1 - Yes</u>	
<u>Customer Survey</u>	<u>43 - Form of address of the contact person</u>		Frau
<u>Customer Survey</u>	<u>44 - Contact person's last name</u>		Reiter

<< < 1 - 7 of 7 > >>

The **Result (%)**, **Max. Points** and **Points Attained** columns are calculated from the answers given by the person (taking into account the weighting).

- 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 single letters to your customer using templates defined by your administrator. The template documents are defined to automatically 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.

Related Data

Related Data						
	Persons x	Activities x	Document Links x	Opportunities x	Offers x	Orders
« < 1 - 1 of 1 > »						
	Title	Keyword	Size (...)	Date	Cre...	
	Invitation.docx		8590	15.03.2013	Super U...	

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.

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 are asked whether you wish to upload the document. The document is automatically checked in once it has been uploaded, and is thus again available to other users.

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 are asked whether you want to:

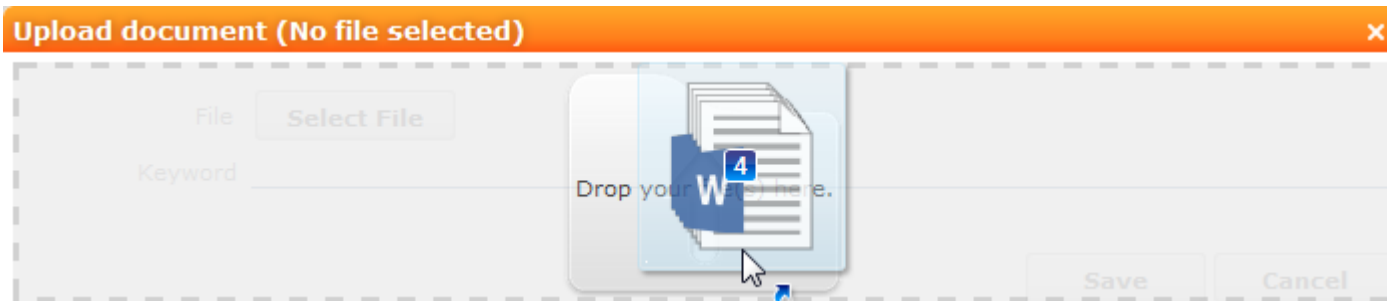
- Cancel logging out in order to upload the document
- Upload the document the next time you use the system. The document remains checked out.
- Undo the check out before logging off.

Saving Documents in the Database

The following options are available for uploading documents to the database:

- Uploading a (Local) Document to the Aurea CRM database
 1. You can choose to upload a general document, or upload the document to a specific record:
 - Select  (**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, see [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.

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.

Note: To send 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.

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.

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.

2. Click on the title of the document or select **Check Out & Edit** from the context menu. The document opens in Microsoft word.

Document Management

You can store existing documents in Aurea CRM web's database, e.g. a letter that you received from a customer. You can create single letters defined by your administrator, which can include data from the database, in order to send a letter to a customer. You can also generate mass mailings within the scope of marketing activities which include data relating to the target group created for the marketing activity. These documents are also stored in the database.


Documents

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.

Related Data


Persons × Activities × Document Links × Opportunities × Offers × Orders



	Title	Keyword	Size (...)	Date	Cre...
	Invitation.docx		8590	15.03.2013	Super U...

2. Click on the document to open it.

The document is opened in the associated application (based on the document type).

Note: 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: Note: CRM.launcher is required to check out documents, >> on page 109.

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: 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:

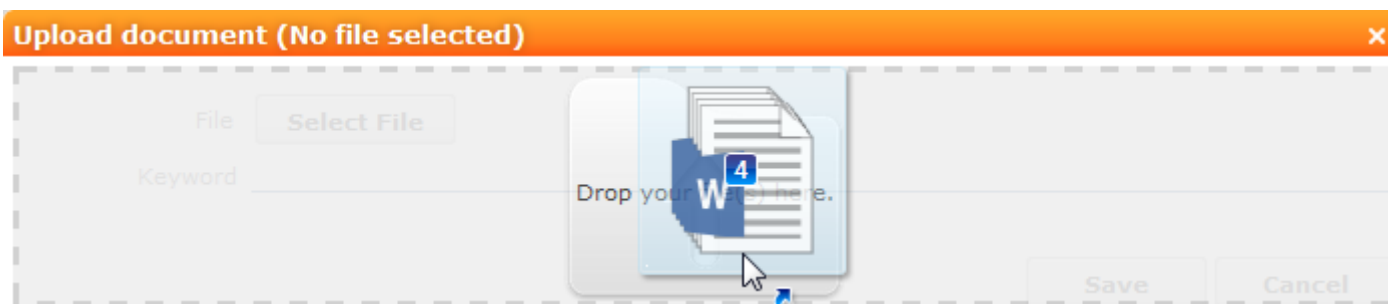
Uploading a (Local) Document to the Aurea CRM database

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.
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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: Note: Your administrator can determine that uploaded images are displayed in the record's mask.

3. Click on **X (Delete)** to remove the current document from the field.

Note: 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, see [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.

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, >> on page 271.

Note: Note: To send 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.

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.

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.

2. Click on the title of the document or select **Check Out & Edit** from the context menu. The document opens in Microsoft word.

Document Templates

Learn about the Aurea CRM Add-in for MS Word and how to create and manage document template.

Using Aurea CRM Addin for Microsoft Word

Aurea CRM Add-in for Microsoft Word allows CRM users to create documents based on templates that meet the corporate customer interaction (CI) guidelines and enrich the documents with content from the CRM.

CRM administrator and users can create template documents that can be used for various recurring tasks. Some of the tasks for different user roles include the following:

- A Sales representative could create and maintain template documents for offer letters, order sheets, e-mail etc. Use the different information in the CRM system to enrich the document.
- Marketing personnel could create new templates to meet the latest customer interaction guidelines. Create templates for marketing campaigns sent by letters or flyers using information from the CRM.
- Service representatives can create solution documents or other documents for different services and use the CRM information in those documents.
- Field service representatives can create service report documents at the customer site along with the current ticket.
- All users can ensure that customers receive information in their preferred language.

Note: To send email in a language other than the default languages, you should use UTF-16 encoding for the template documents. For example, to send a mail in Cyrillic, encode the HTML template document in UTF-16.

- The Aurea CRM word Add-in supports the following features:
- Allows you to use the same set of methods used by Aurea CRM web.
- Template documents can use fields that are used to store information in Aurea CRM.
- You can generate the documents on CRM.pad using the same templates from Aurea CRM.
- Serial and single letter fields can be easily integrated into the templates using drag and drop features.
- You can create template documents in multiple languages.
- You can create formatted text, when merging documents and mail merge.
- Allows you to embed additional information in the documents like images and pictograms.

Installing Aurea CRM Add-in for Microsoft Word

The recommended way to install Aurea CRM Word Add-in is to use a network shared location containing the latest installation package. Ask your CRM administrator for the central shared location for the CRM Add-in for Word installation package. Using this process ensures that the latest version of the CRM Add-in for Word is automatically upgraded to the latest version. You only have to install it once using the shared central location.

If your organization does not provide a shared location, the Aurea CRM add-in for Word installation package can be found on the Aurea CRM customer support site.

To install the Aurea CRM add-in for Word:

1. Browse to the network shared central location provided by your CRM administrator.

Or

Unzip the package

`OfficeAddins_<versionNo>_full.zip`

. The

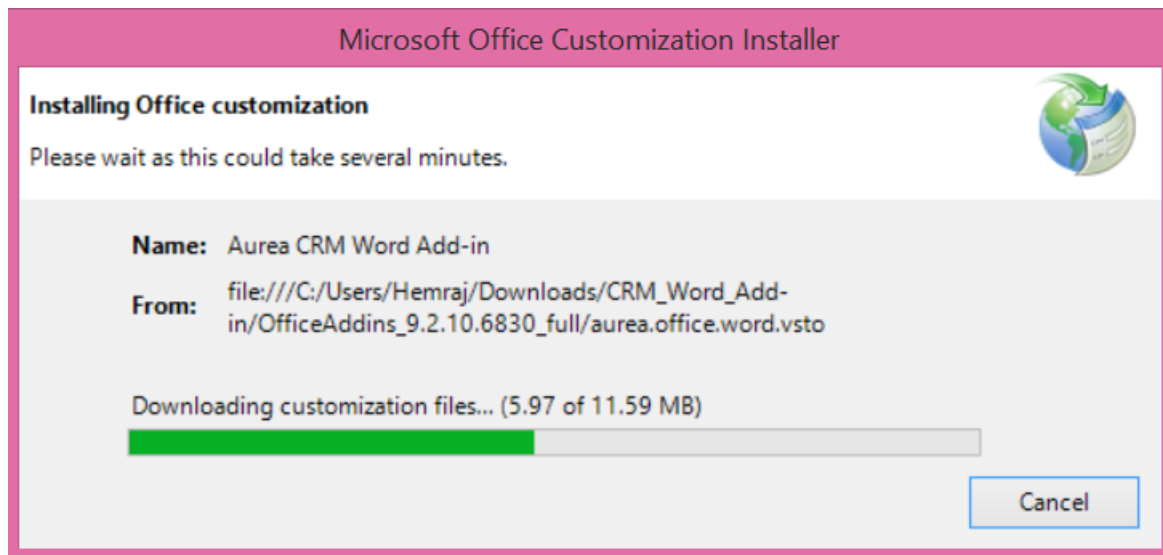
`<versionNo>`

is the latest version available on the customer support site.

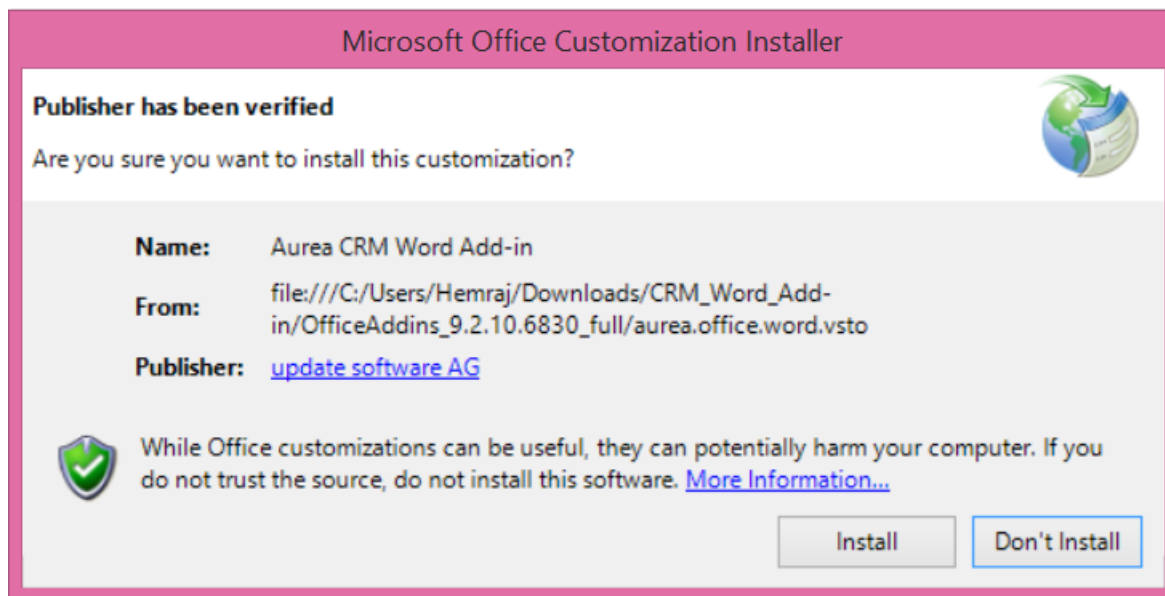
2. Double click

`aurea.office.word.vsto`

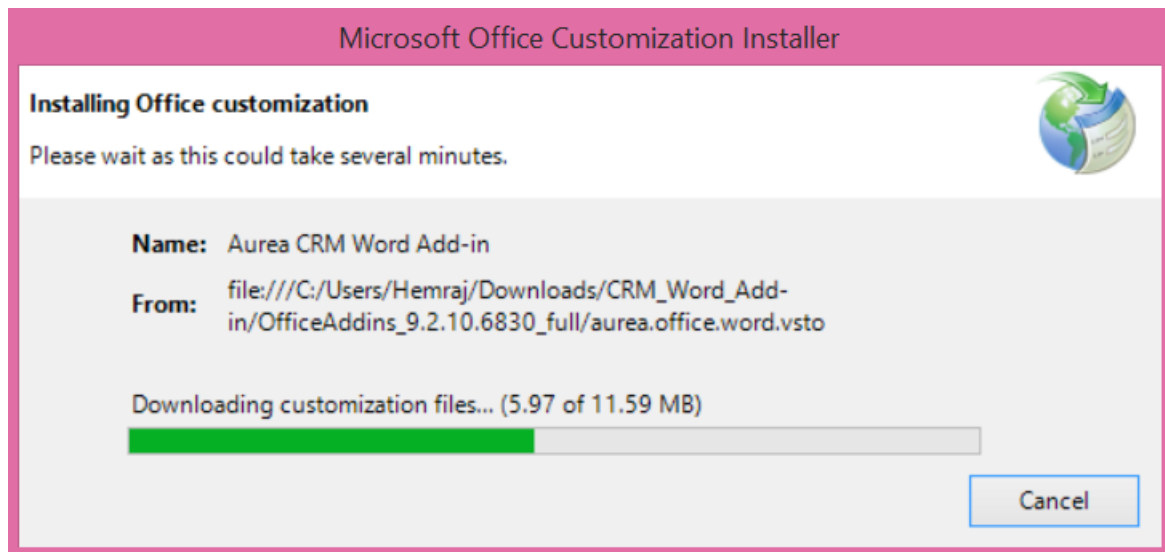
file in the shared location or the unzipped folder. The Microsoft Office Customization Installer window opens.



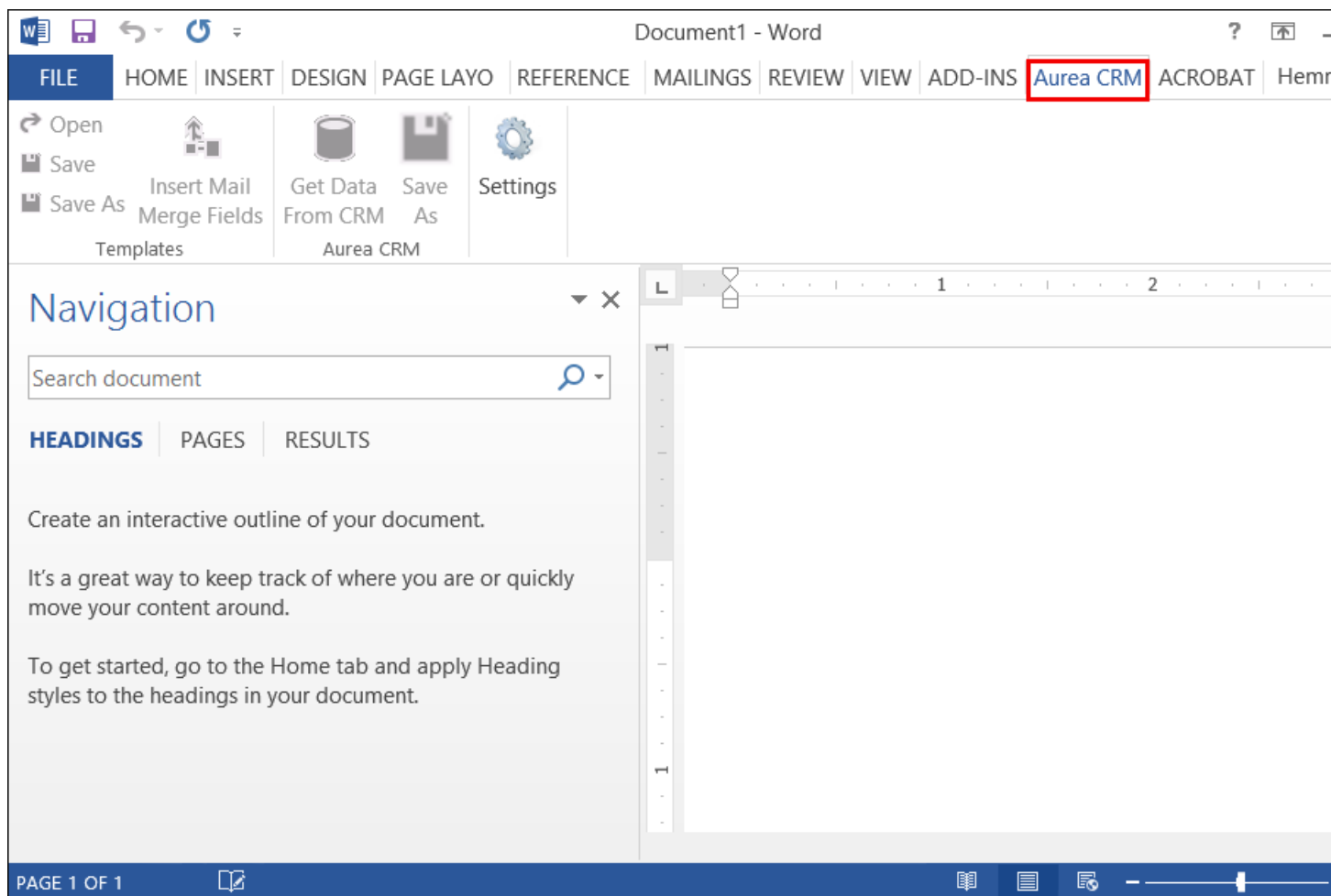
The installer verifies the publisher, in this case Aurea CRM, and then displays the following window.



3. Click **Install**. The Installing Office Customization message displays.



4. The window automatically closes on successful installation.
5. Start Microsoft Word and open a blank document, the **Aurea CRM** menu item should be visible.
6. Click the **Aurea CRM** menu.



7. To work with the plugin you have to be connected to Aurea CRM. Click **Settings** to open the connection dialog.

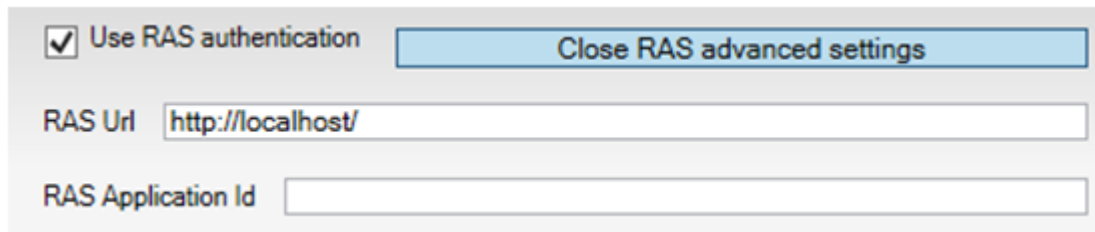
 A screenshot of the Aurea CRM connection dialog box. The dialog has a title bar and contains the following fields and controls:

- Aurea CRM URL:
- Use RAS authentication
- Aurea logo (Au) on the left.
- Username:
- Password:
- CRM Language:
- Use Single Sign On
-
- Version: 10.0.0.326

8. Enter the following details in the connection dialog:
- Enter the URL of the Aurea CRM server.
 - If Aurea CRM web is deployed on a RAS server, perform the following steps:

Select the **Use RAS authentication** checkbox.

Click **Open RAS Advanced Settings**. The following RAS settings dialog displays:

A screenshot of a settings dialog box for RAS authentication. It features a checked checkbox labeled "Use RAS authentication" and a blue button labeled "Close RAS advanced settings". Below these are two text input fields: "RAS Url" containing "http://localhost/" and "RAS Application Id" which is currently empty.

Use RAS authentication Close RAS advanced settings

RAS Url

RAS Application Id

Enter the URL for the RAS server and the Application ID of Aurea CRM web instance on the RAS server.

Click **Close RAS advanced settings**.

1. Click **Log In**.
2. Now you can use the CRM Word Add-in to create templates for your documents.

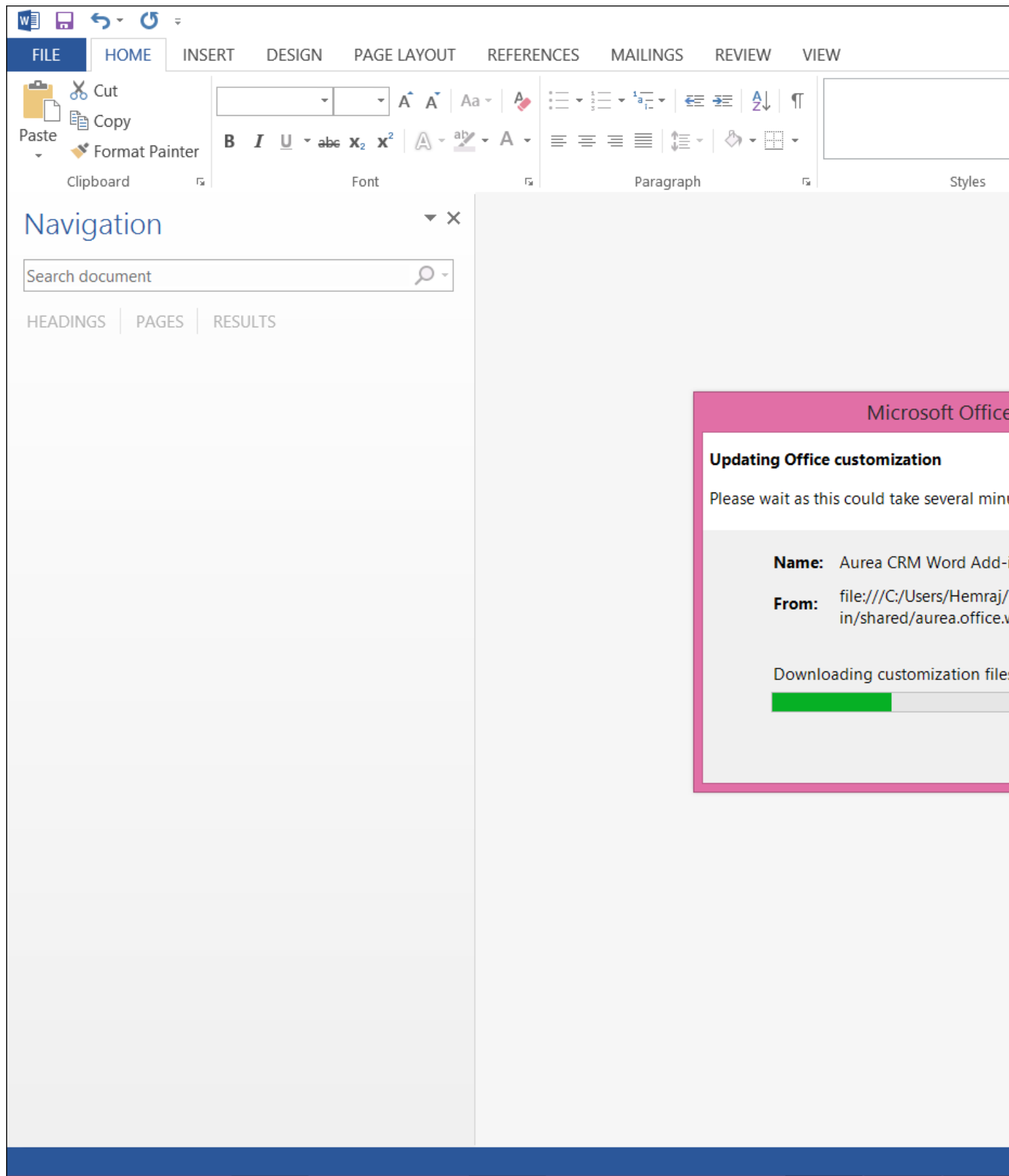
Upgrading the Aurea CRM Add-in for Microsoft Word

Aurea CRM Add-in for MS Word is developed as a VSTO Add-in. Visual Studio Tools for Office (VSTO) Add-ins use the ClickOnce deployment solution which automatically updates your installation of CRM Add-in for Word. This requires your administrator to publish Aurea CRM Add-in to a network shared central location. You can install the latest version from this location once, all subsequent upgrades then happens automatically. Publishing a new version to this location automatically updates the CRM Add-in for Word installed from this location. ClickOnce checks this location once in every seven days for new updates.

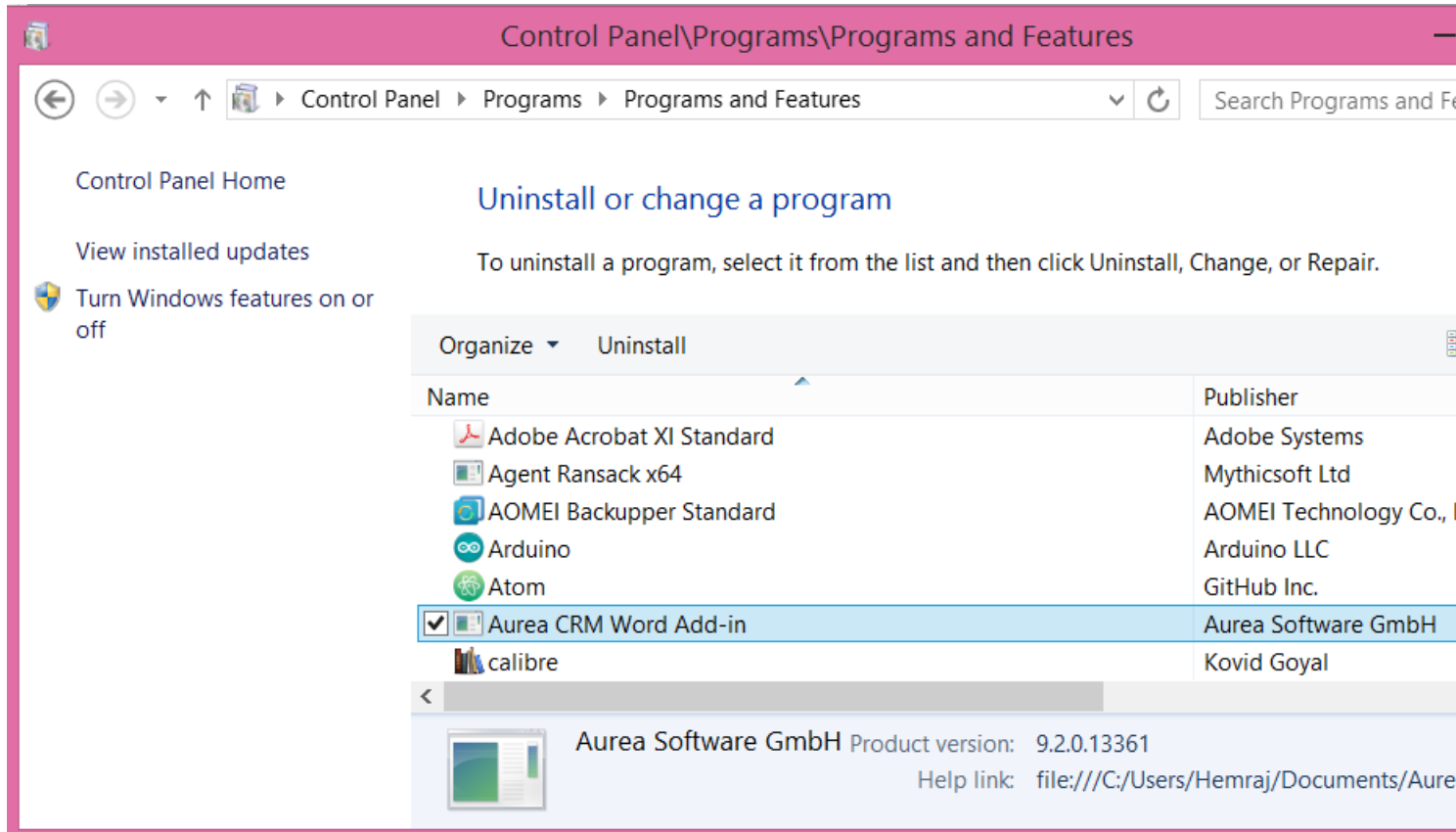
Note: If there are multiple users on your machine, then you have to install your own version of CRM Word Add-in. This is a limitation of the ClickOnce solution.

Note: You may have to login to the shared network location to ensure that it is accessible to the ClickOnce installer to check for a new version of the CRM Add-in and perform the upgrade.

If you have used a network shared central location to install CRM Add-in for word, your upgrade should start automatically. If a new version is published to the shared location, on starting MS Word, ClickOnce installer checks the shared folder for a newer version and if a new version is available, it automatically starts the update process.



If you have installed the word plugin using the installer package from the support site, then you have to uninstall the existing Aurea CRM Word Add-in from **Control Panel > Programs > Programs and Features**.



Unzip the package. This is the latest version available on the customer support site. Follow the installation instructions in [Installing Aurea CRM Add-in for Microsoft Word](#).

OfficeAddins_<version no>_release.zip

<version no>

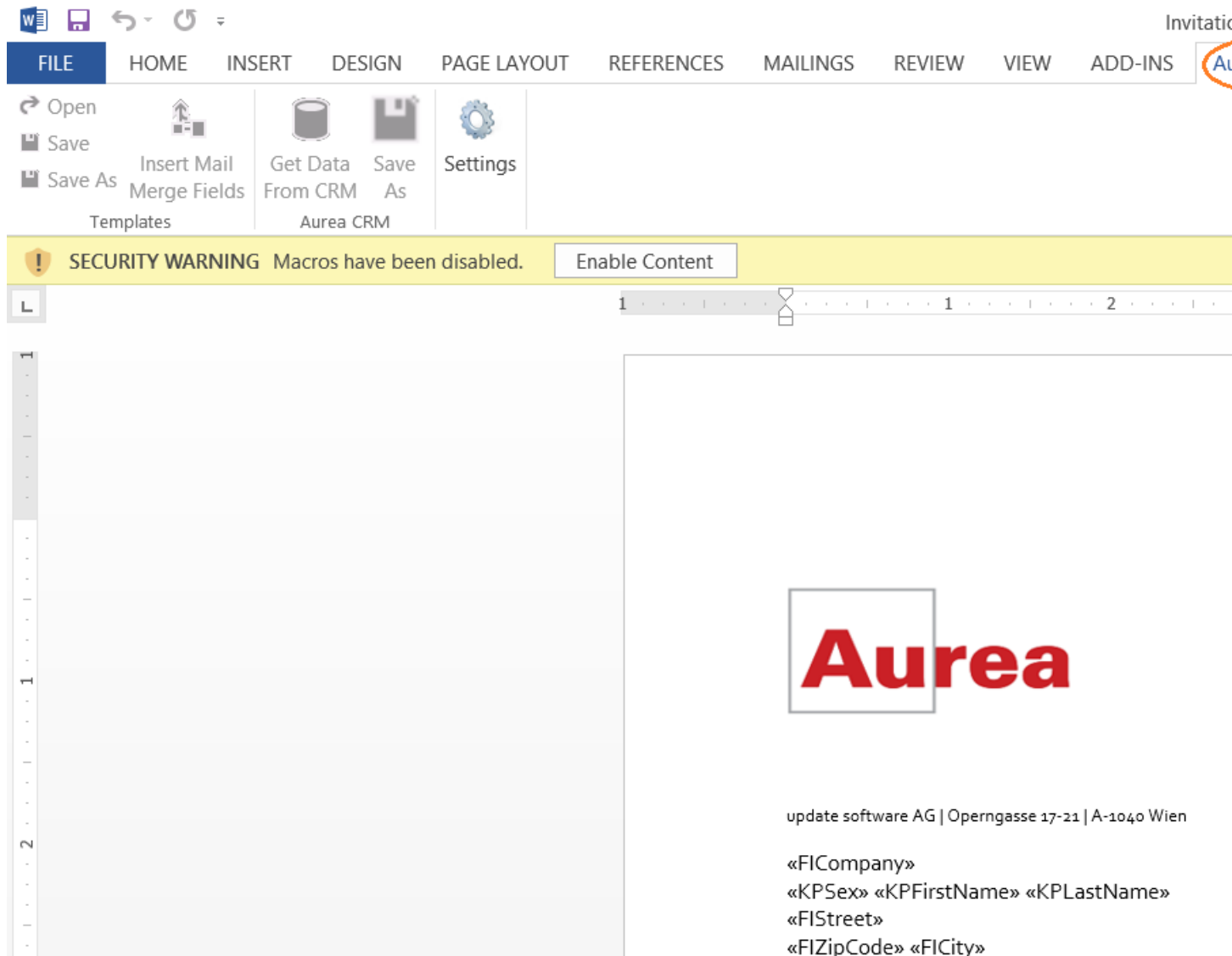
Creating and Saving new Document Template

You can create document templates for documents that you regularly use for recurring tasks.

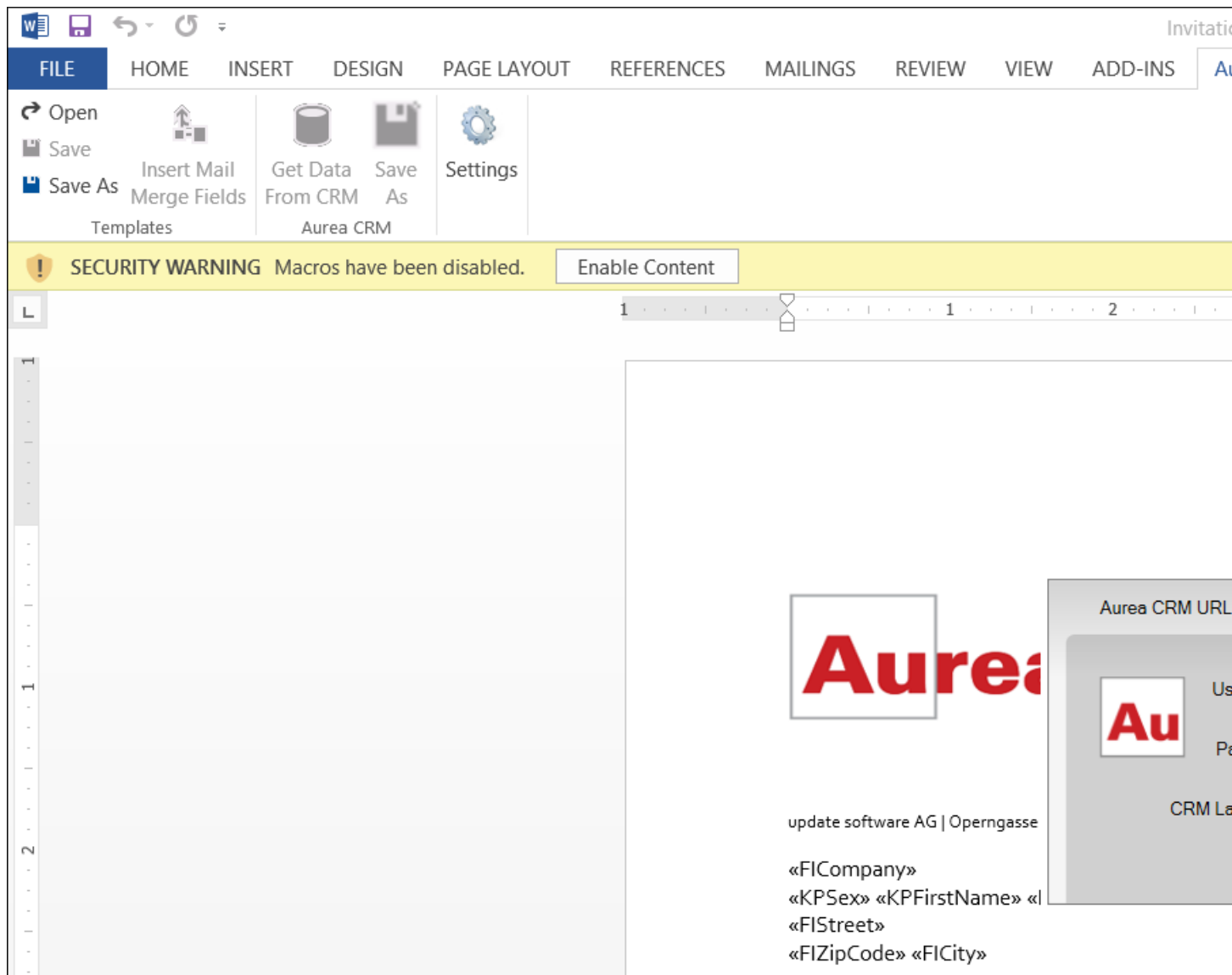
Note: To send an e-mail in a language other than the default languages, you should use UTF-16 encoding for the template document. For example, to send an e-mail in Cyrillic, encode the template document in UTF-16.

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 Aurea CRM sub-menu items are activated until you login.

6. Click **Save As** to open the dialog.
 - a. Give a **File Name** for the template document.
 - b. Select the **Document Class** of the template, from the following options:
 - **MailMerge Template**
 - **Template (BASE)**

The screenshot shows a 'Save As' dialog box with the following fields:

- File Name: .docx
- Document Class:
- Save button:

In this case, we save the template document as a **MailMerge Template** class.

Note: The document class is drawn from the CRM, therefore the drop-down values can be different based on your installation.

- Click **Save**. The template document is saved to the D1 infoarea of the Aurea CRM server.

Note: After a template is saved to Aurea CRM, the **Insert Mail Merge Fields** menu item is activated.

- Login to the Aurea CRM server with the same username and password and search for the document. The saved document should be visible in the search list as shown in the screenshot below:

The screenshot shows the 'Search Documents' interface with the following search criteria:

- Title: Template
- Document Class: Mail Merge Template
- Keyword: [Empty]
- Created on: MM/DD/YYYY
- Private: [Checked]
- With me: [Unchecked]

The search results table is as follows:

Title	Documen...	Keyword	Created by	Created on	Updated on	Created in M..
TemplateInvitation.docx	Mail Merg...		Simon Seller	05/12/2016	05/12/2016	web

- Click **Insert Mail Merge Fields**, to update the document with information from the records on Aurea CRM server. The **Mail Merge Fields** column displays.

FILE HOME INSERT DESIGN PAGE LAY REFEREN MAILINGS REVIEW VIEW ADD-INS Aurea CR ACROBAT Hemraj...

Open Save Save As Insert Mail Merge Fields Get Data From CRM Save As Settings

Templates Aurea CRM

SECURITY WARNING Macros have been disabled. Enable Content

1 2 3 4

Aurea

update software AG | Operngasse 17-21 | A-1040 Wien

«FICompany»
«KP5ex» «KPFirstName» «KPLastName»
«FISStreet»
«FIZipCode» «FICity»

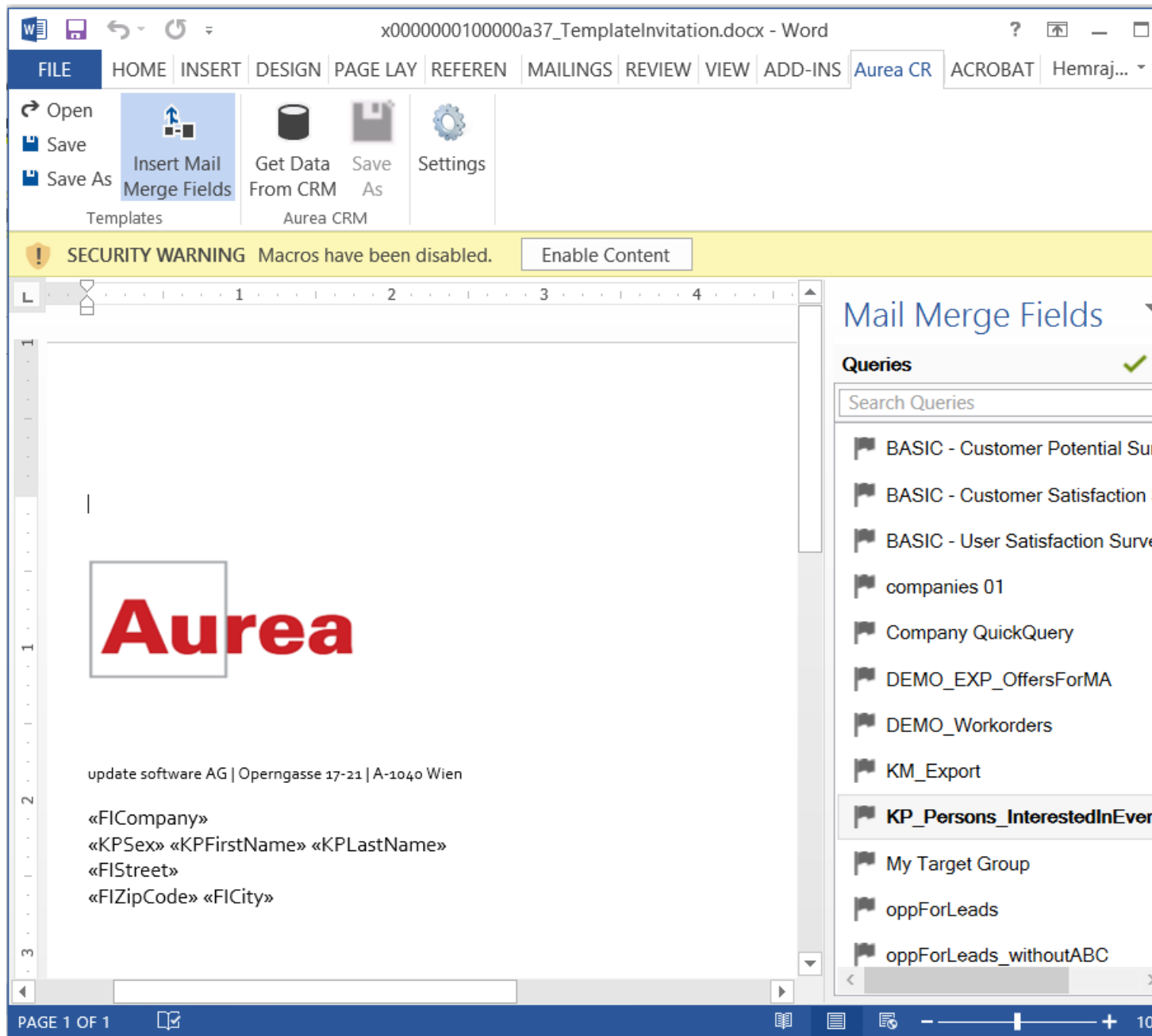
Mail Merge Fields

Query : KP_Persons_Int

- CONTACT PERSON [KP]
 - Form of address [KPSe
 - Acad. Title [KPQualific
 - Last Name [KPLastNar
 - First Name [KPFir
 - E-mail [KPE-mail1]
 - Department [KPDivision
 - Position [KPPosition]
 - Function [KPFfunction]
- COMPANY [FI]
 - Company [FIComp
 - Country [FICountry]
 - Postal Code [FIZip
 - City [FICity]
 - Street [FIS
- SALES GROUP [S]
 - Rep 1 ID [SBRe
 - REP [ID]
 - Name [IDNa
- INTEREST [IT]
 - Interest Group [
 - Interest [ITInter


PAGE 1 OF 1



10. Click **Queries** () to list existing queries.



11. You can create a new query by selecting an existing query then modifying, and saving it.

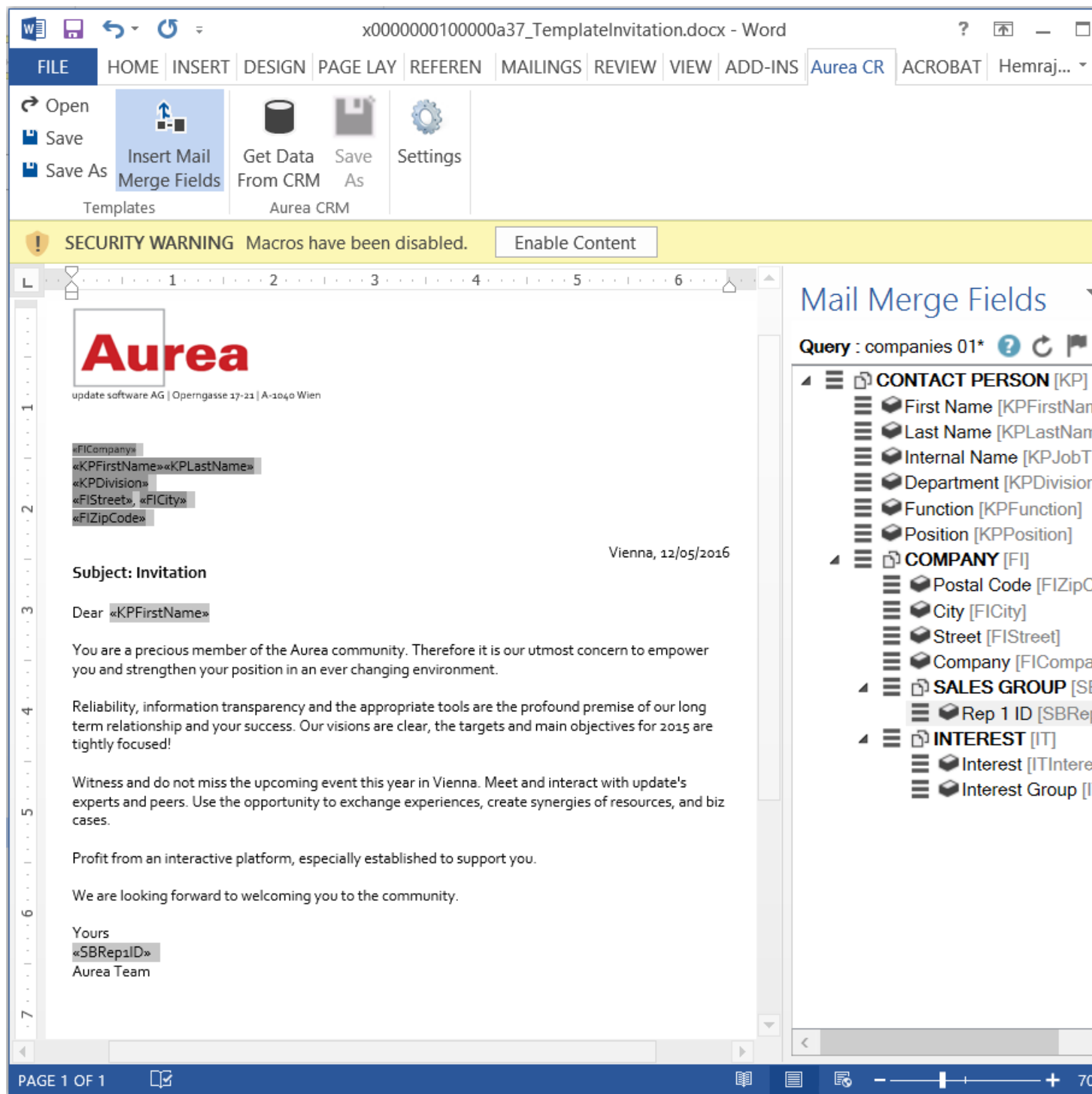
To create a new query, perform the following:

- 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**.
- c. Click **Add Info Area** to open the **Select info Area** dialog.
- d. Select the infoarea of interest and select the required fields from that info area. For this example, type **KP** and select the **Contact Person** info area. The **Select Field(s) in Info Area: Contact Person** dialog box opens.

- e. Select the required fields in the **Available Fields pane** and click  to move it to the **Selected Fields pane**. Click **OK**. The selected infoarea and fields are displayed in the Mail Merge Fields.
- f. To add more info areas, right click on an infoarea and select **Add Info area**. Selecting the infoarea opens a Relationships dialog. You can define the type of relationship between the existing infoarea and the new one you add.
- g. Select the required fields from for the new infoarea. The following screenshot shows the **Mail Merge Fields** with the selected info areas and parameters.
- h. Click  to save the modified query.

Note: This overwrites the before selected query and the changes is done in the CRM solution. Please ensure that the query can be modified to your requirements to avoid conflicts with queries set up by other users.

- 12.To populate the template document with the fields from infoarea records, drag and drop the fields in the required places. The following screenshot shows the template document enriched with fields.



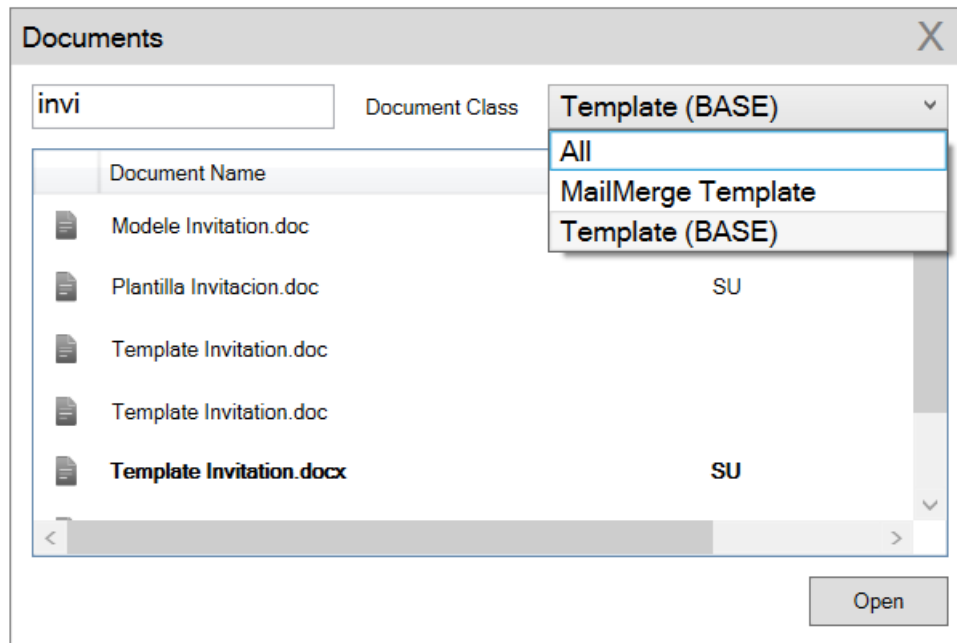
13. Click **Save**. The template document is saved to the D1 infoarea on Aurea CRM server.

Opening and Editing document templates

You can open an existing template and edit and save it. You can also rename it and save it with a different template name.

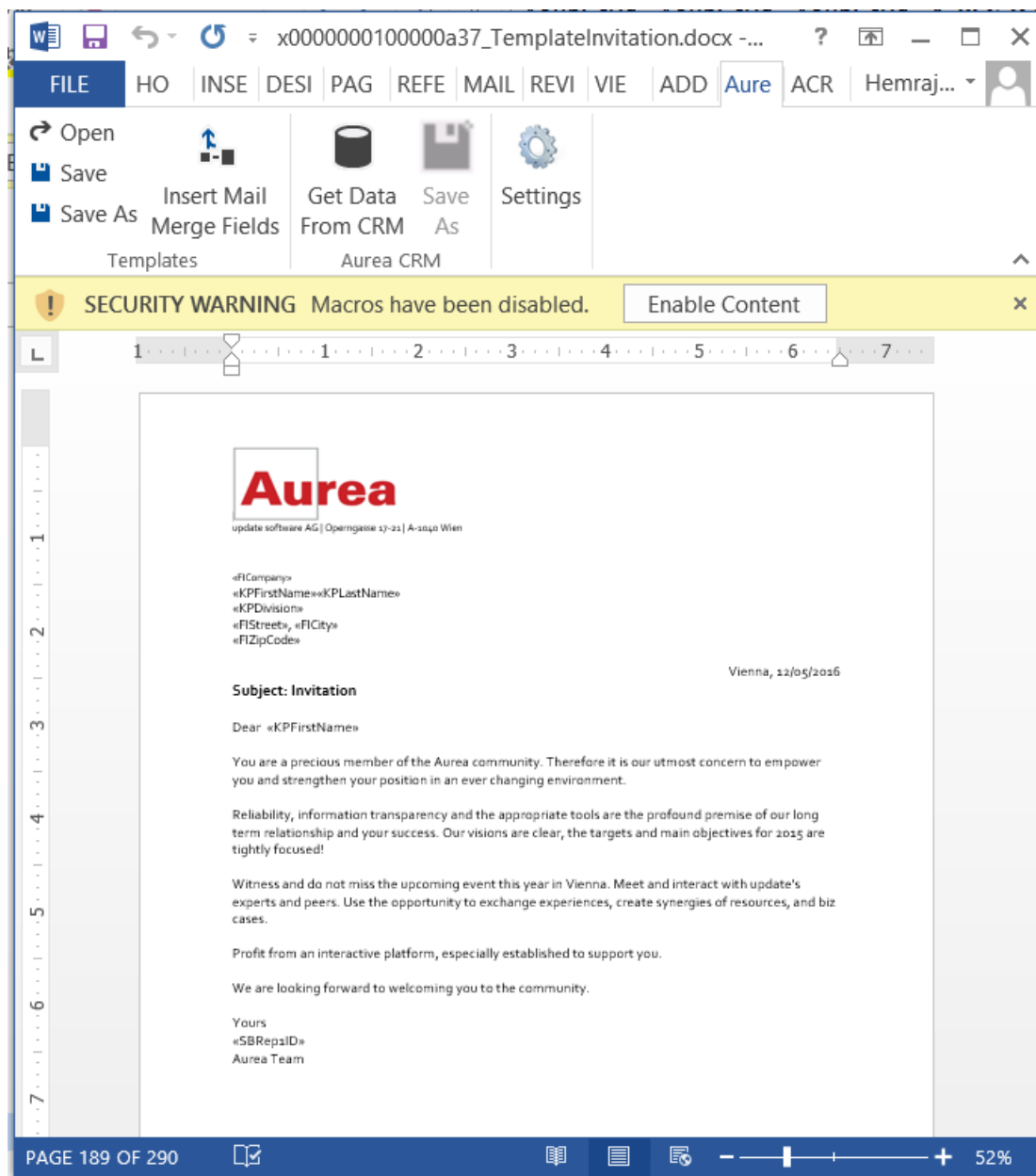
To open an existing template:

1. In the Microsoft Word, click on the **Aurea CRM** menu item.
2. Click **Settings**, and login to the Aurea CRM server.
3. Click **Open**. The **Documents** dialog is displayed.

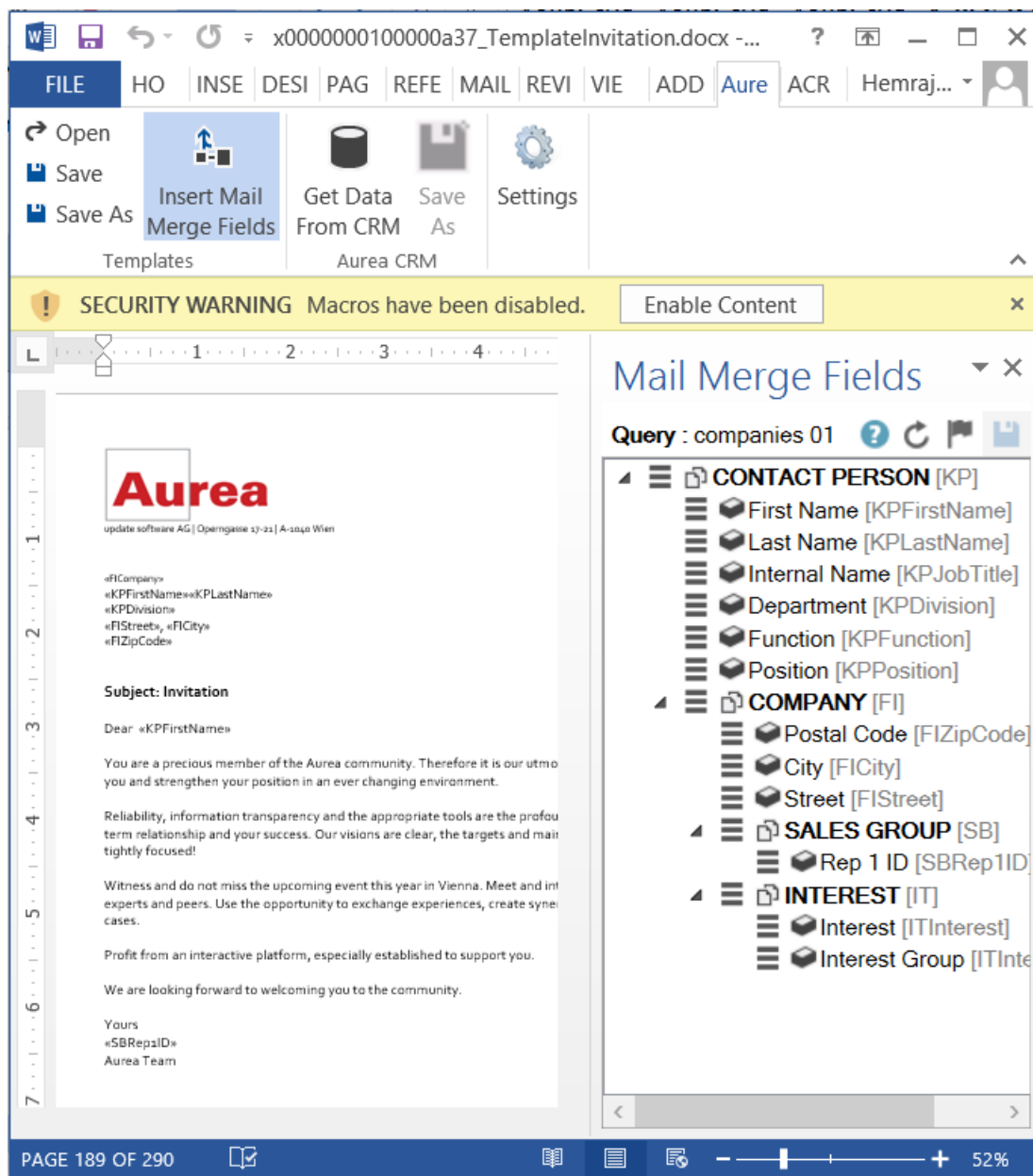


You can type in the text box to filter for a specific document. You can also select the name of the template document. In the screenshot above, **Template (BASE)** was the document class selected and **invi** was typed in the filter text box, to find the **Template Invitation.docx** template.

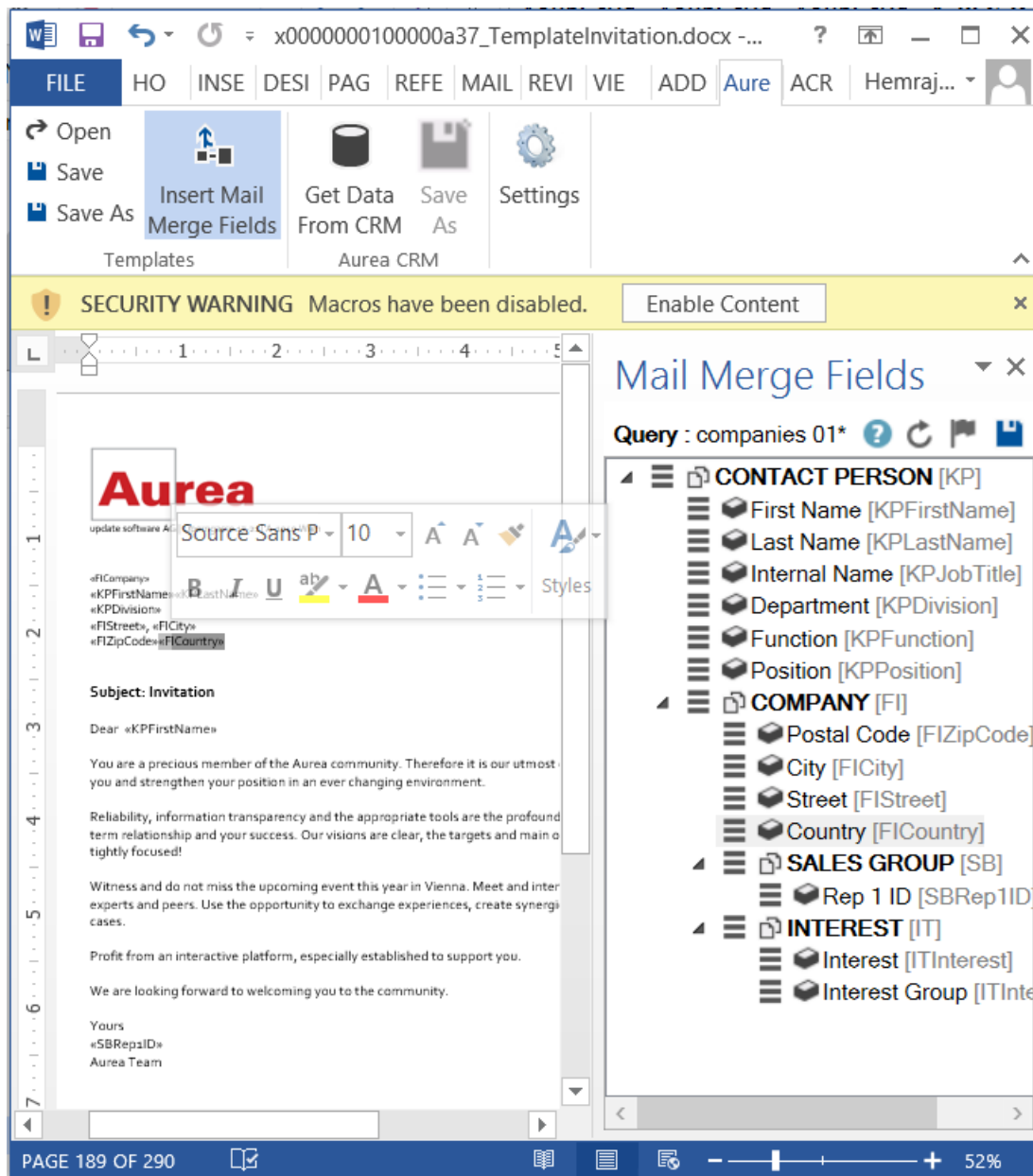
4. The selected template document is retrieved from the Server and loaded into Microsoft Word. For example, the screenshot below shows the **Template Invitation.docx**.



5. You can edit the template document and make modifications. For example, in the Invitation template.docx, you might want to add the country name, after the City name.
6. Click Insert Mail Merge Fields. The Mail Merge Fields column displaying the fields from the selected infoarea is displayed to the right of the editing pane. See the screenshot below.



- To add a field from the infoarea to the template document, select the field and drag and drop it in the document at the appropriate position. For example, the Country field was selected and added to the document. See the screenshot below.



8. Click **Save**. The template document is saved to the D1 area of Aurea CRM.

Mail Merge Using Document Templates

To generate a document for several persons using the document template:

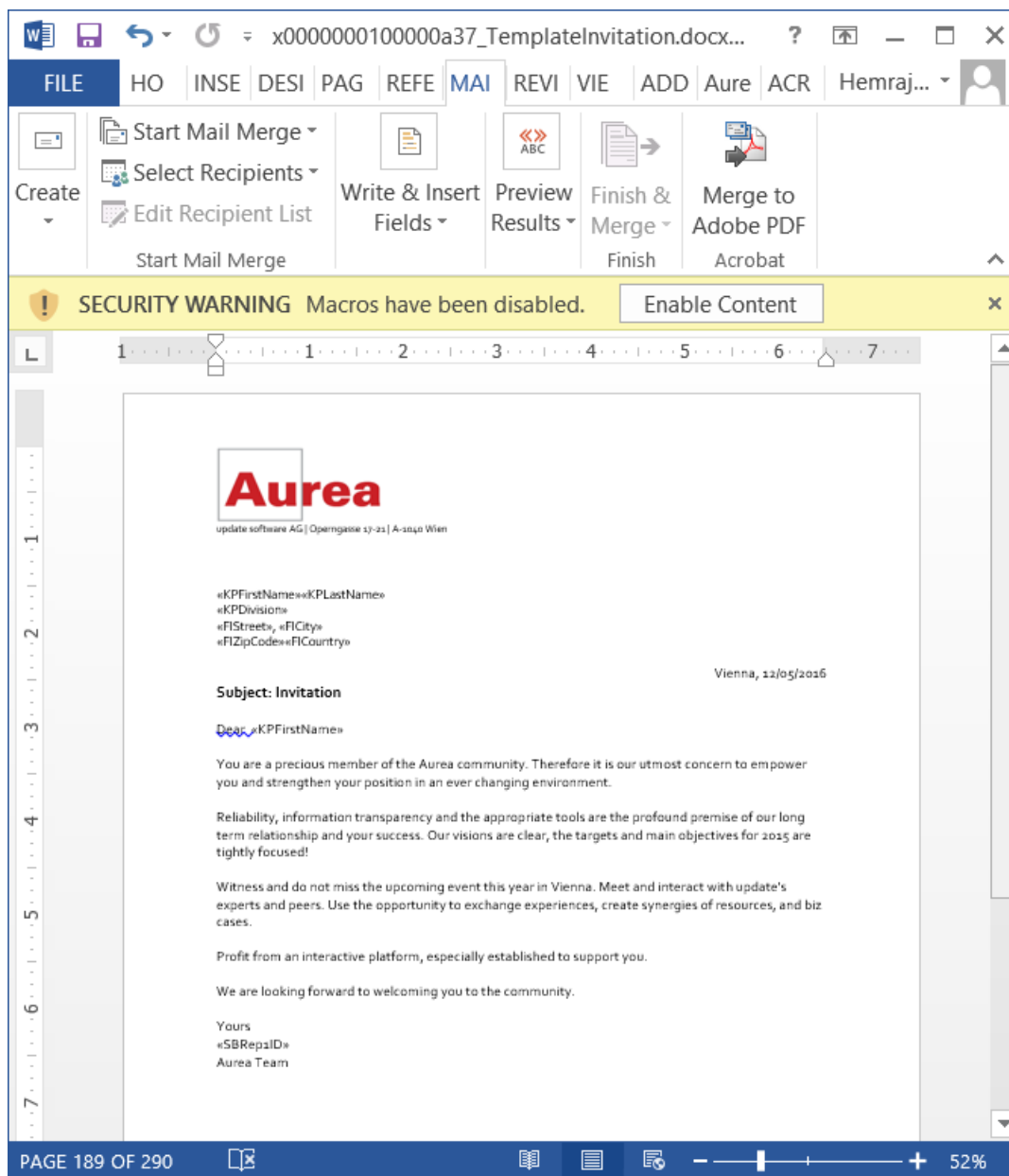
1. From the Aurea CRM menu, login to the CRM server and open the Mail Merge template document. Edit the template document if necessary. For more information, see [Opening and Editing document templates](#).
2. Click **Get Data From CRM**. The Select Records dialog displays single record or a list of records, showing the data fields you selected. You can then select the data you want use with the document template.

Select Records X

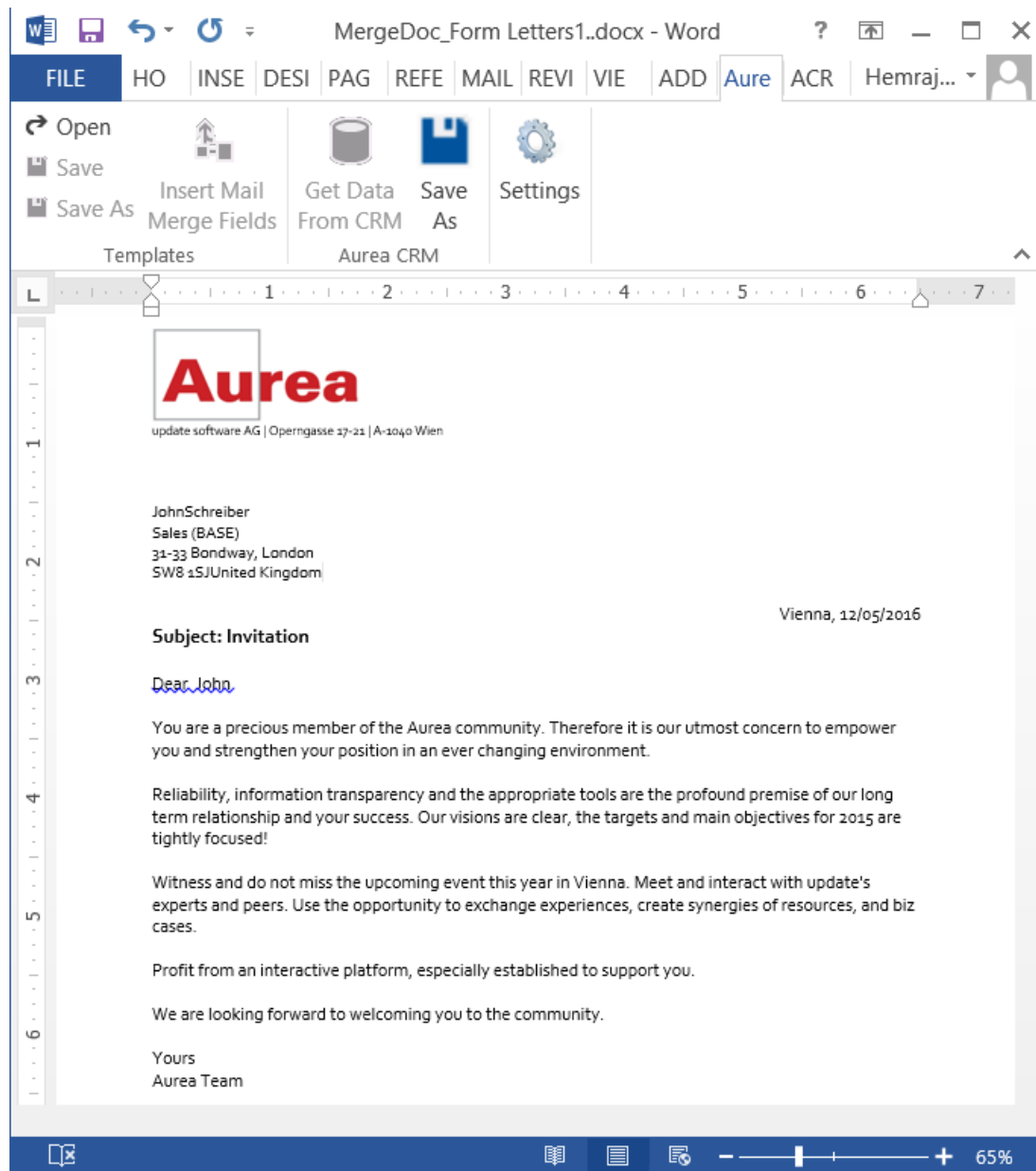
<input type="checkbox"/>	First Name	Last Name	Internal Name	Department	Department 2	Department 3	Department
<input checked="" type="checkbox"/>	Ron	Anderson	Managing Director	Sales (BASE)			
<input type="checkbox"/>	Ron	Anderson	Managing Director	Sales (BASE)			
<input type="checkbox"/>	Ron	Anderson	Managing Director	Sales (BASE)			
<input type="checkbox"/>	Ron	Anderson	Managing Director	Sales (BASE)			
<input checked="" type="checkbox"/>	Charles	Darwin	Director	Management Board (BASE)			
<input type="checkbox"/>	Charles	Darwin	Director	Management Board (BASE)			
<input type="checkbox"/>	Charles	Darwin	Director	Management Board (BASE)			
<input type="checkbox"/>	Charles	Darwin	Director	Management Board (BASE)			
<input checked="" type="checkbox"/>	Denise	Paltrow	Program Manager	Marketing (BASE)			
<input type="checkbox"/>	Denise	Paltrow	Program Manager	Marketing (BASE)			

[Start Mail Merge](#)

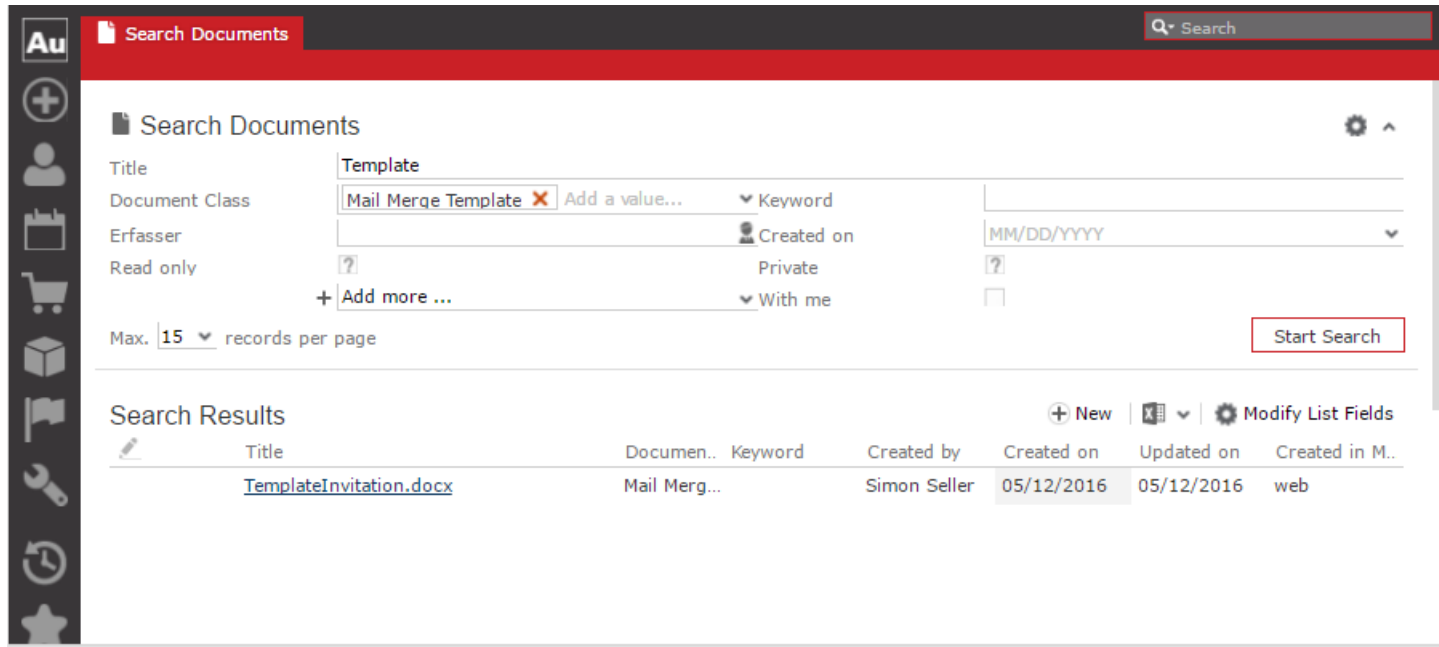
3. Click **Start Mail Merge**. The document is opened in a new Window.



4. To see the individual documents populated with the field values, select the required recipient from the **Preview Results** menu. The document is populated with the required information. The following screenshot shows the merged fields with their values populated and highlighted.



5. You can work with the documents created from the Aurea CRM server. The following screenshot shows the **Invitation template.docx** template document on the CRM server.

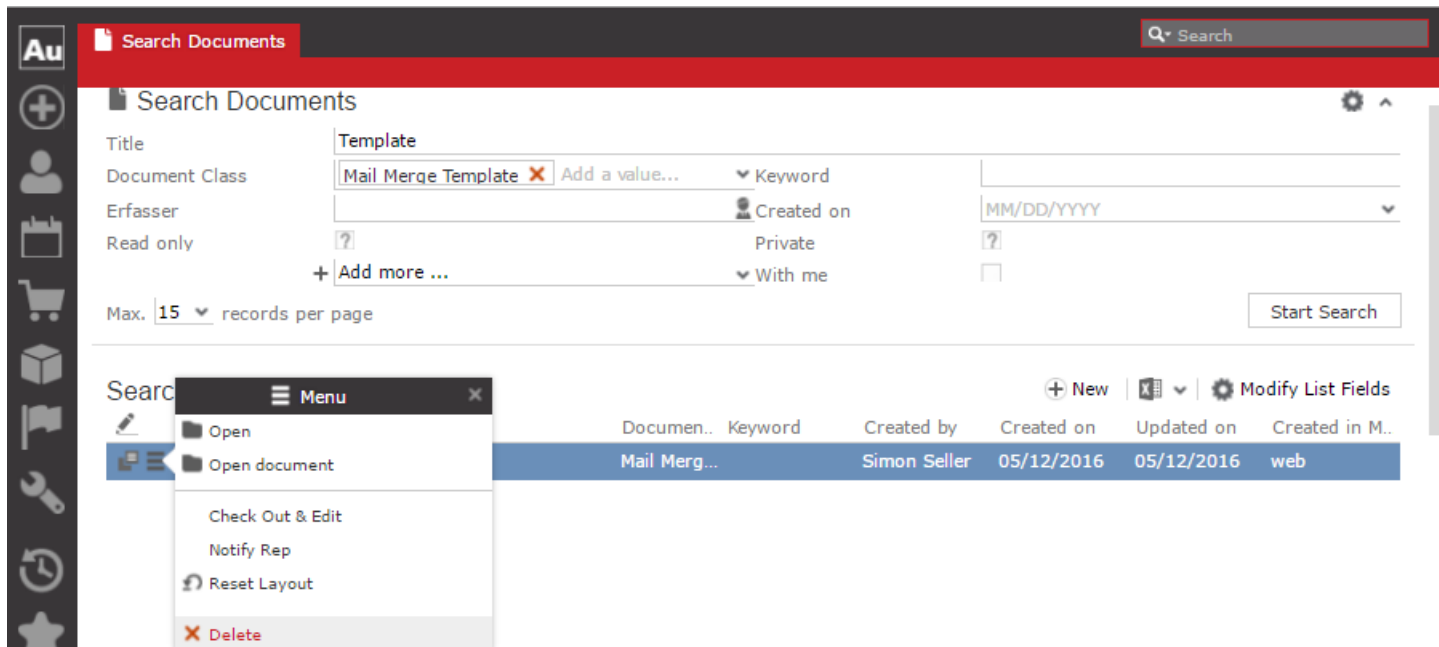


Deleting a Template Document

You can delete a template document from the CRM server. This deletes the template document along with all linked information in Aurea CRM and the D1 infoarea.

To delete a template document:

1. Search for your documents in Aurea CRM using **Colloborate > Documents** menu option.
2. Open the required document from the search results.
3. Select the **Delete** option from the context menu for the document.

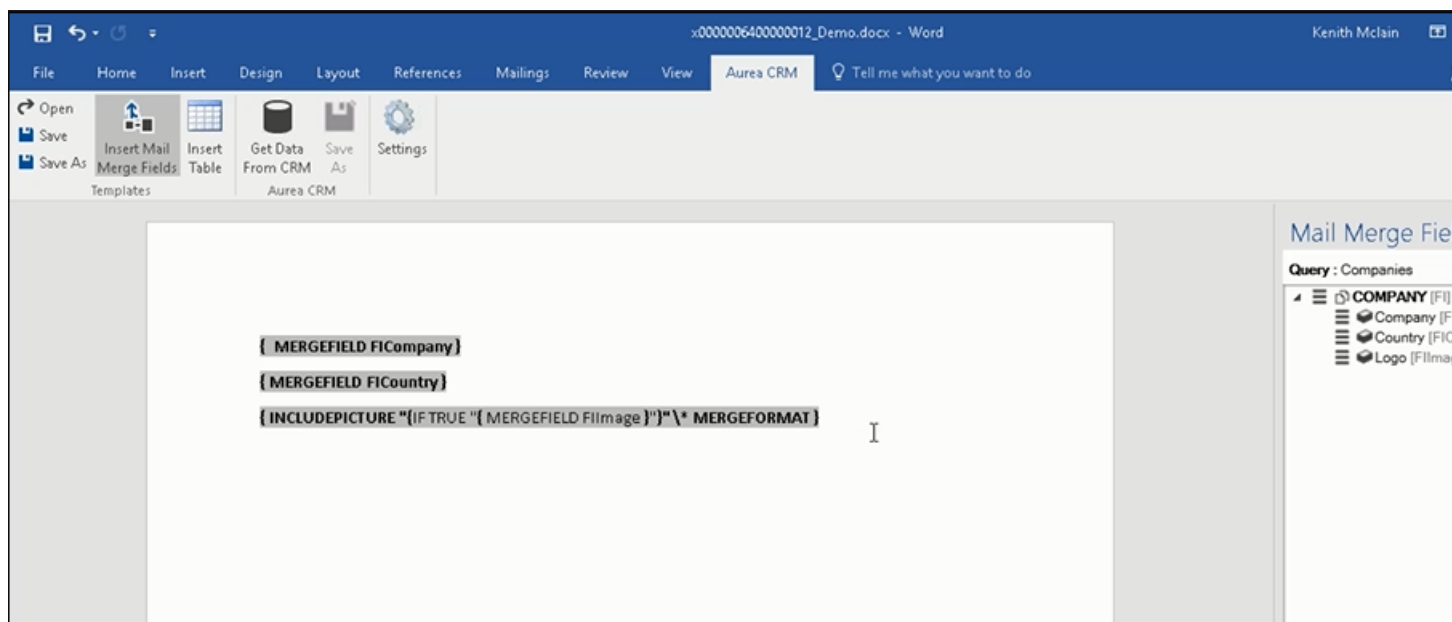


Working with Images in the Template Document

You can add images and then modify them in the template document. The following steps show a sample of adding an image to the template document and then making some modifications to the image. You should be using the standard functions available in Microsoft Word to process an image, like resizing and adding borders.


Perform the following steps:

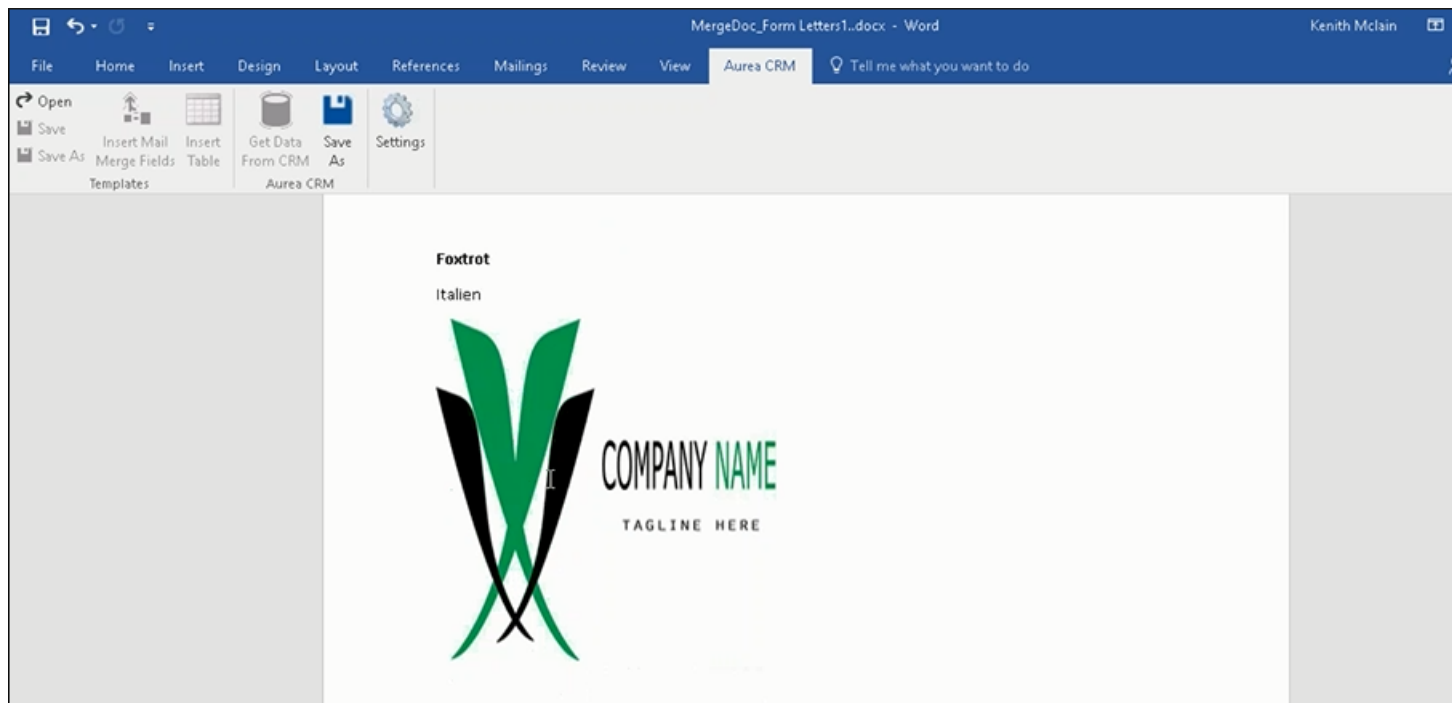
1. Create a new blank template document. Perform steps 1 to 11 in the topic, creating and saving new Document Template on page 200. In step eleven you have to create a query that retrieves the fields from the infoarea that has the images you require. For this example steps, we have created a simple query to retrieve the Company infoarea records that has the Logo field containing images of company logos (F1Image), the name of the company (F1Company), and the country (F1Country) it is located in.
2. Add the three fields the company name, country, and logo fields to the template document. The Word add-in automatically detects that the added field is an image field and adds the appropriate code, see the screenshot below.



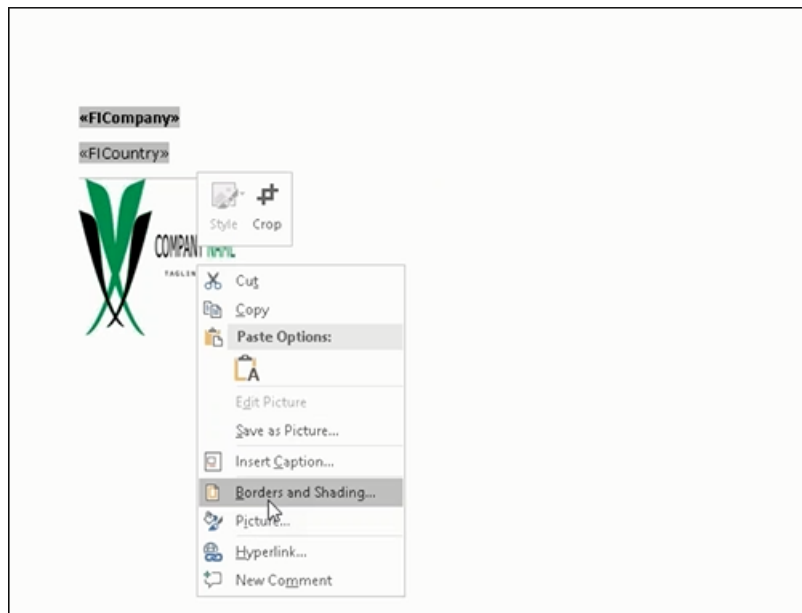
3. Format the fields to the desired fonts, bold it and other changes you desire, as you would a normal a normal word document.




4. Click  to execute the mail merge and fetch the data and populate the record field and create the pages for each record set in the CRM database. The screenshot below shows one of the pages generated.



5. To resize the displayed image switch to the template document and click on the logo record, a sample image is displayed, resize it as you would resize an image in a word document.
6. To add a border, right click on the image in the template document and select Borders and Shadings as shown in the screenshot below.



7. Add a border using the standard Borders dialog in MS Word.

8. Click  to execute Mail Merge again. The resulting document is shown in the screenshot below.



Adding Tables to a Template Document

Aurea CRM add-in for Microsoft Word provides an **Insert Table** feature that allows you to create a hierarchical grouping of records.

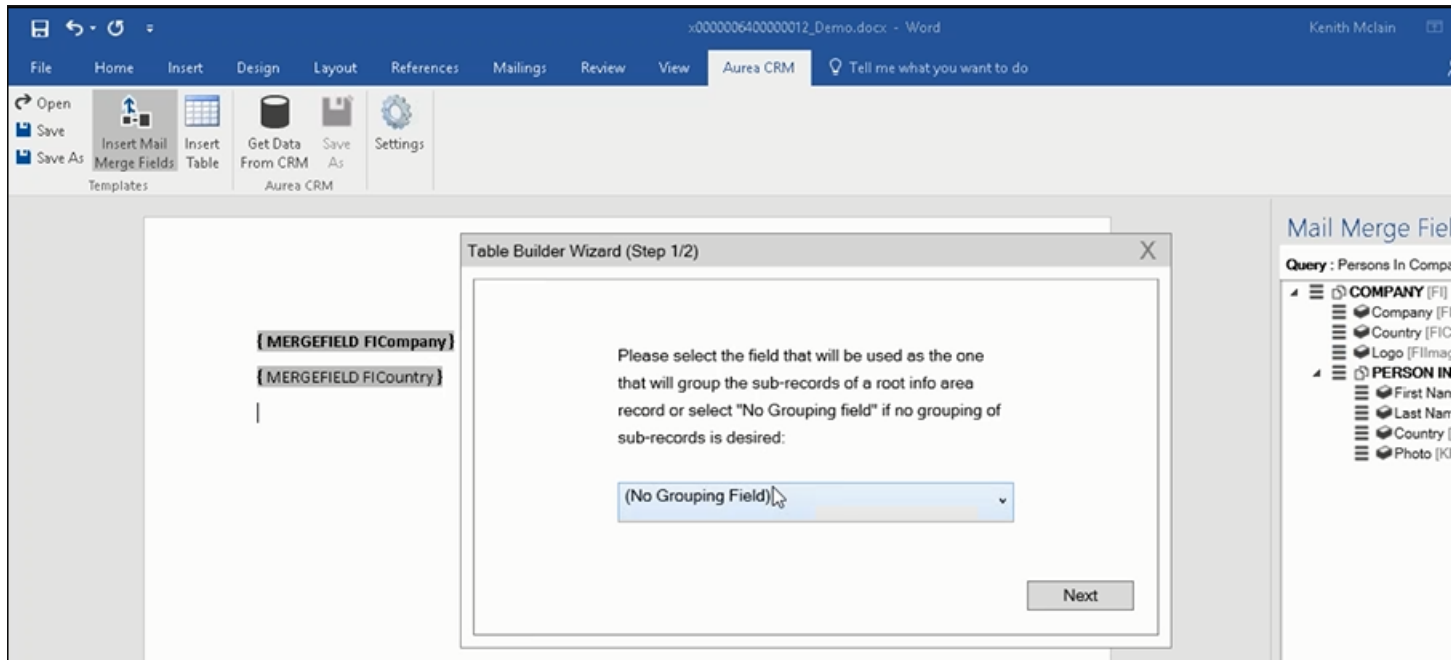
For example, if you want to group all the employees of a company into separate documents, you have to use the Insert Table feature. If you have two companies and three employees in each company then a simple mail merge would create six pages containing the company name and one employee name. If you use the Insert Table feature then the result document contains two pages for the two companies and all the employees of a company grouped in a single page.

The sample table created in the procedure described below uses a query to retrieve a company along with the employees of the company.

Perform the following steps:

1. Create a new blank template document. Perform steps 1 to 11 in the topic, [Creating and Saving new Document Template](#). In step eleven you have to create a query that retrieves the fields from the infoarea that has the information that you want to tabulate. For this example steps, we have created a complex query to retrieve the Company infoarea records along with its employee information.
2. From the Mail Merge Fields add the Company name and the Country fields to the template document.
3. Click Insert Table.

The **Table Builder Wizard (Step1/2)** dialog displays. See the screenshot below.



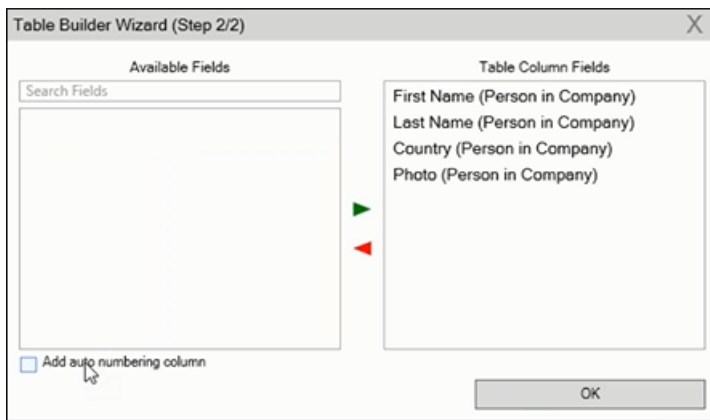
4. You can add tables to the template document based on a grouping field or without a grouping field. A grouping field groups the sub-records of a selected parent record. To add a table based on a grouping field, go to step 5.

To add a table without grouping fields, perform the following steps:

- a. Click Next. The **Table Builder Wizard (Step2/2)** dialog displays.



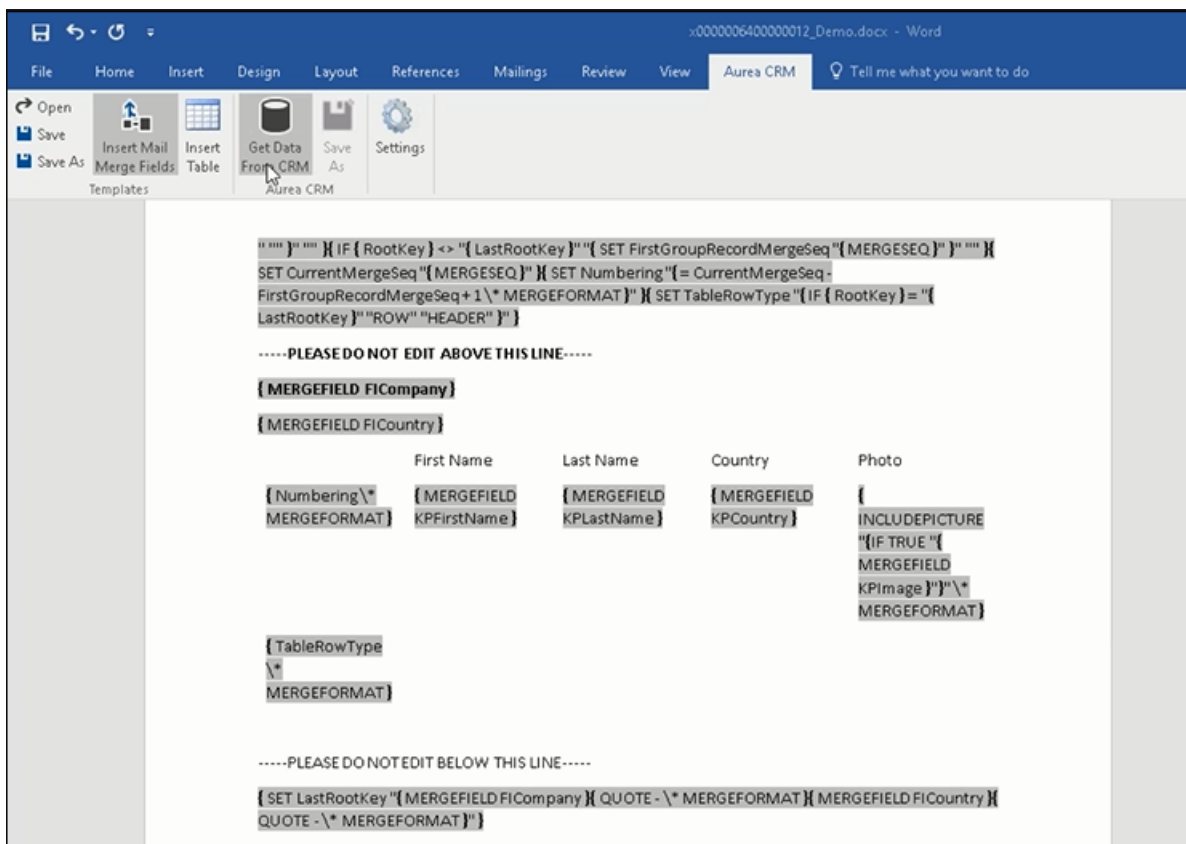
- b. The **Available Fields** pane in the dialog displays the records that you can add to your table.
- c. Select the records that you want to add to your table and click ► to select the required records. The selected records are added to the **Table Column Fields** pane.




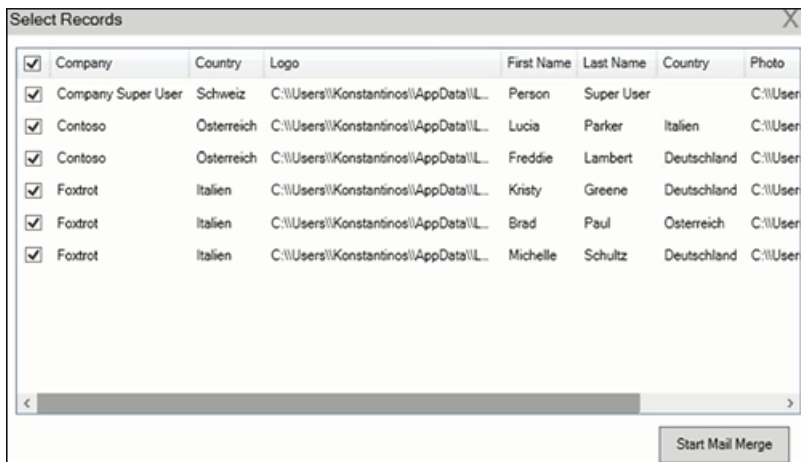
- d. Click **Add auto numbering column** to add the numbering column for all the employees that get populated for each company in the result documents.

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.

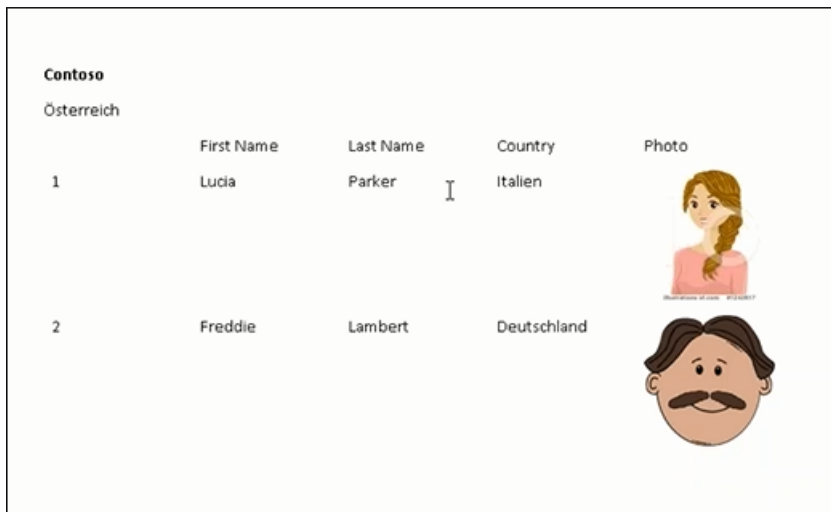


- g. Click  to execute the mail merge. The **Select Records** dialog is displayed.



h. Click **Start Mail Merge**.

i. The results documents are created. Sample pages containing the tables for companies are shown below.



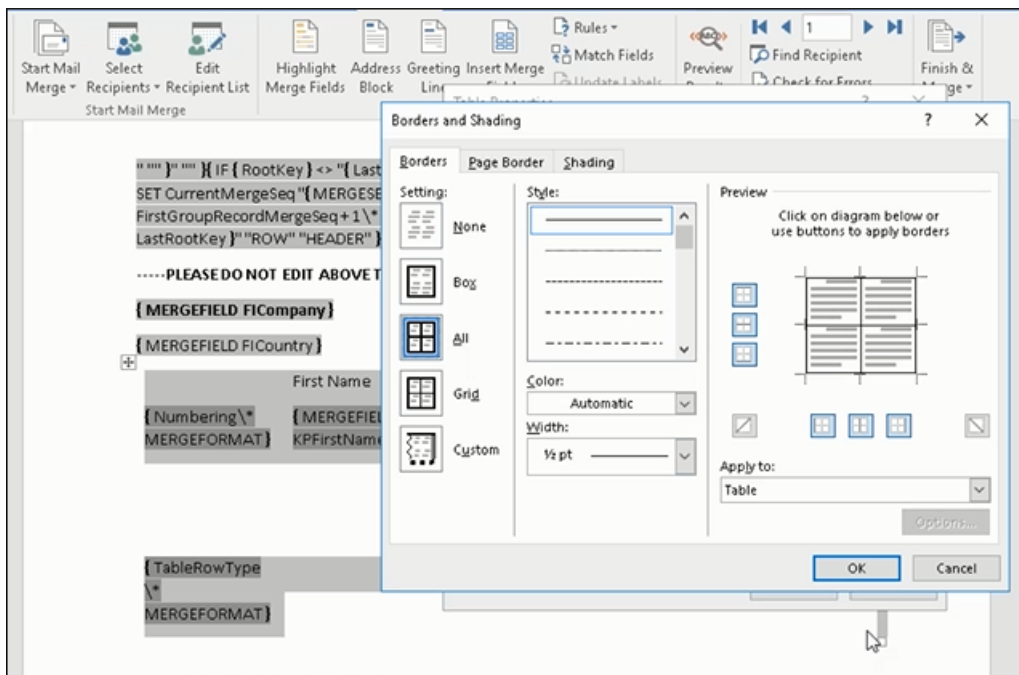
Another page:

	First Name	Last Name	Country	Photo
1	Kristy	Greene	Deutschland	
2	Brad	Paul	Österreich	
3	Michelle	Schultz	Deutschland	

- j. You can add formatting to the table by selecting the table format in the template document and add the required formatting.
- k. To format the table, go to the template document, right click the table and select **Table Properties**.

Last Name	Country	Photo
{MERGEFIELD KLastName}	{MERGEFIELD KPCountry}	{INCLUDEPICTURE \"IF TRUE \" {MERGEFIELD KPIImage}\" \\\" MERGEFORMAT}\"}

- l. In this example, we 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.

	First Name	Last Name	Country	Photo
{ Numbering * MERGEFORMAT }	{ MERGEFIELD KPFirstName }	{ MERGEFIELD KPLastName }	{ MERGEFIELD KPCountry }	{ INCLUDEPICTURE \"IF TRUE\" { MERGEFIELD KPIImage } \" * MERGEFORMAT }
{ TableRowType * MERGEFORMAT }				


n. You can resize the image. Click the image record in the table and resize the image visible in the table cell. See the screenshot below.

-----PLEASE DO NOT EDIT ABOVE THIS LINE-----

«FICompany»


«FICountry»

+



	First Name	Last Name	Country	Photo
1	«KPFirstName»	«KPLastName»	«KPCountry»	
HEADER				

-----PLEASE DO NOT EDIT BELOW THIS LINE-----



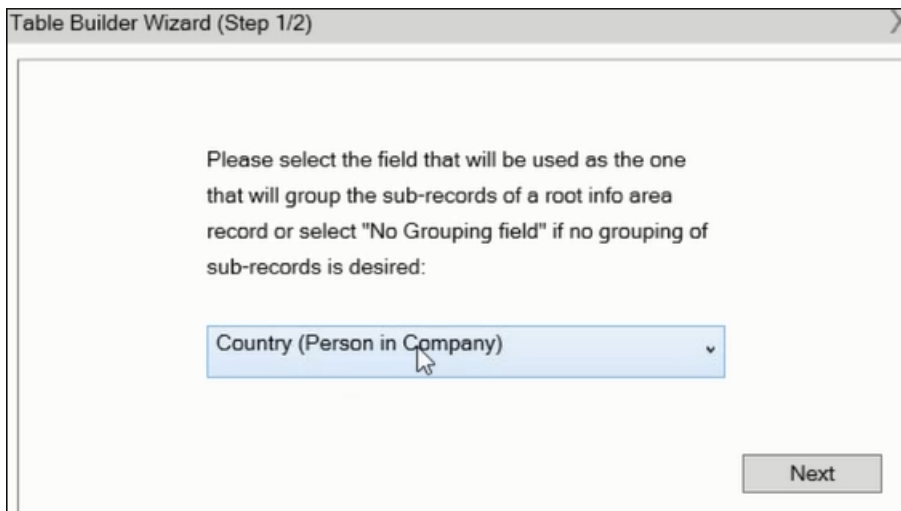
- o. To see the result of resizing, click  to start the mail merge. A result page is shown in the screenshot below. The images are displayed in the size specified in the template document.

Contoso
Österreich

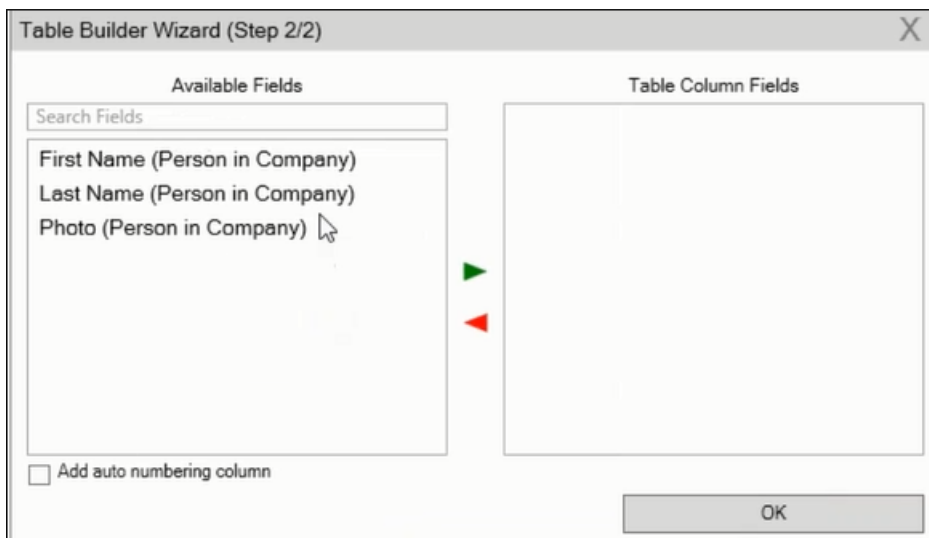
	First Name	Last Name	Country	Photo
1	Lucia	Parker	Italien	
2	Freddie	Lambert	Deutschland	

This completes the steps required to generate documents without using a grouping field.

5. To create a template document using a grouping field, perform the following steps:
- Select a grouping field. The following screenshot shows the **Country (Person in Company)** field selected.



- b. Click **Next**. The **Table Builder Wizard (Step2/2)** dialog displays.



Note: This grouping fields does not show Company record in the available fields as it is not a sub-record of the selected grouping field, **Country (Person in Company)** field.

- c. Select the records you want to add to the table columns and click ► to add the records to the **Table Column Fields**. Click **OK**.

The table wizard generated the required code in the template document.

- d. Add the Company name and the Company Country records to the template document. See the screenshot below.

Insert Table Get Data From CRM Save As Settings

Aurea CRM

```

IF { MERGESEQ } = "1" { SET LastGroupKey "-1" } } IF { MERGESEQ } <> "1" { IF { GroupKey } <> {
LastGroupKey } }
" " " " { IF { GroupKey } <> { LastGroupKey } } { SET FirstGroupRecordMergeSeq "{ MERGESEQ }" }
" " } { SET CurrentMergeSeq "{ MERGESEQ }" } { SET Numbering "{ = CurrentMergeSeq -
FirstGroupRecordMergeSeq + 1 \ * MERGEFORMAT }" } { SET TableRowType "{ IF { GroupKey } = {
LastGroupKey } "GROUP_ROW" "{ IF { RootKey } <> { LastRootKey } "GROUP_FIRST_HEADER"
"GROUP_HEADER" }" } } { SET GroupingField "KPCountry" }

-----PLEASE DO NOT EDIT ABOVE THIS LINE-----

{ MERGEFIELD FCompany }

Company Country: { MERGEFIELD FICountry }

{ MERGEFIELD KPCountry }
+



|                                  | First Name                 | Last Name                 | Photo                                                                   |
|----------------------------------|----------------------------|---------------------------|-------------------------------------------------------------------------|
| { Numbering \ * MERGEFORMAT }    | { MERGEFIELD KPFirstName } | { MERGEFIELD KPLastName } | { INCLUDEPICTURE "{ IF TRUE "{ MERGEFIELD KPIImage }" \ * MERGEFORMAT } |
| { TableRowType \ * MERGEFORMAT } |                            |                           |                                                                         |

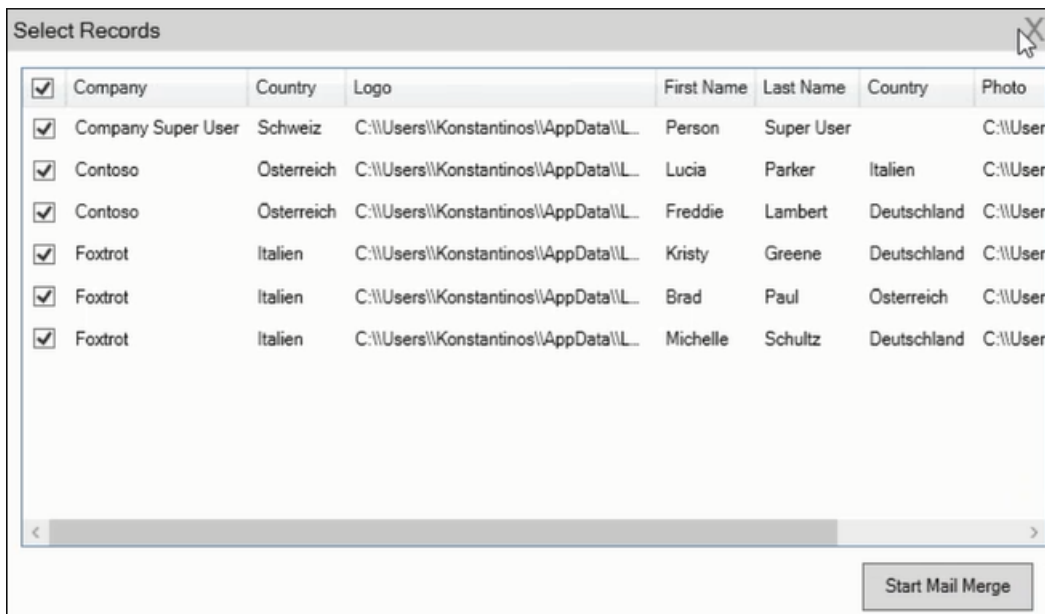

-----PLEASE DO NOT EDIT BELOW THIS LINE-----

{ SET LastRootKey "{ MERGEFIELD FCompany } QUOTE - \ * MERGEFORMAT } { MERGEFIELD FICountry }
QUOTE - \ * MERGEFORMAT } } { SET LastGroupKey "{ MERGEFIELD FCompany } QUOTE - \ *

```



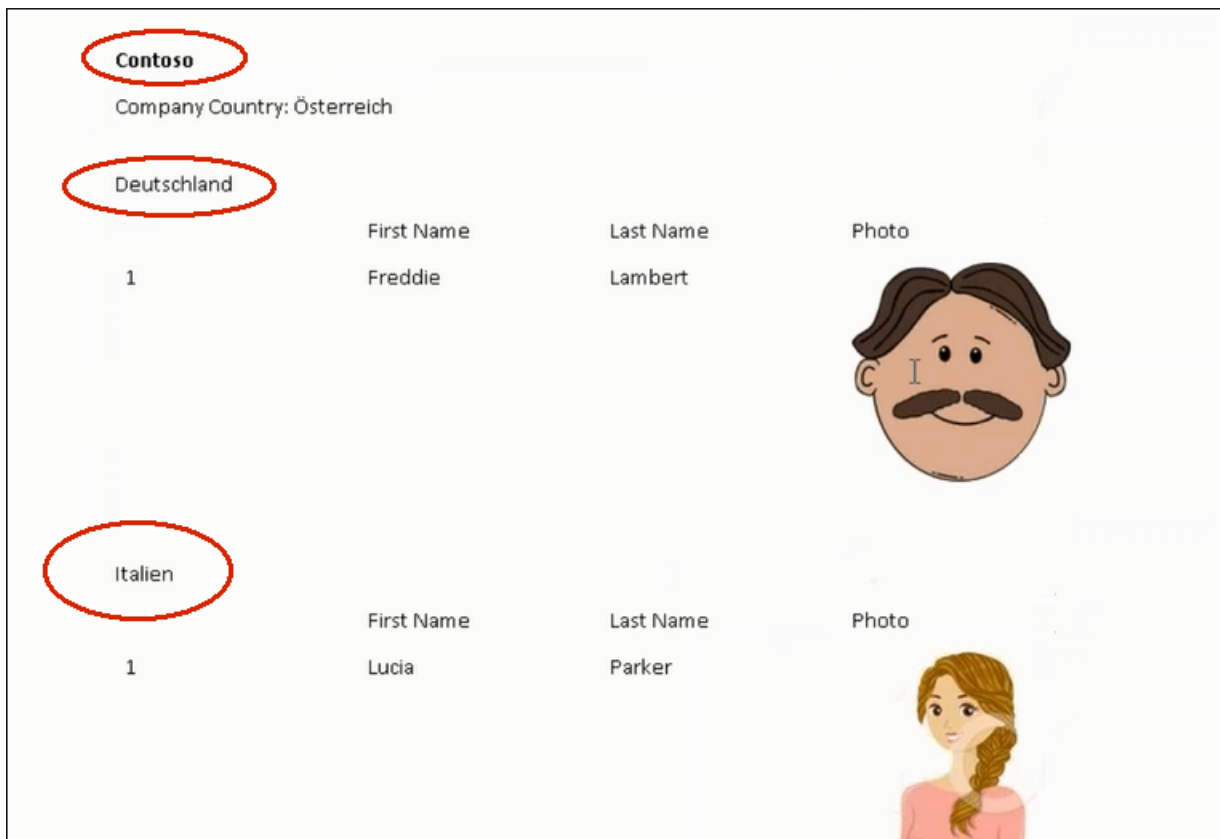
- e. Click  to execute the mail merge. The **Select Record** dialog displays. See the screenshot below.



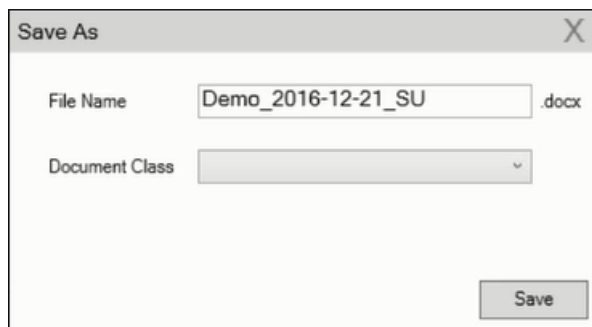
f. Click Start Mail Merge to generate the result document.

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,

<documentName_<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.

Using Aurea CRM Addin for Microsoft Word

Aurea CRM Add-in for Microsoft Word allows CRM users to create documents based on templates that meet the corporate customer interaction (CI) guidelines and enrich the documents with content from the CRM.

CRM administrator and users can create template documents that can be used for various recurring tasks. Some of the tasks for different user roles include the following:

- A Sales representative could create and maintain template documents for offer letters, order sheets, e-mail etc. Use the different information in the CRM system to enrich the document.
- Marketing personnel could create new templates to meet the latest customer interaction guidelines. Create templates for marketing campaigns sent by letters or flyers using information from the CRM.
- Service representatives can create solution documents or other documents for different services and use the CRM information in those documents.
- Field service representatives can create service report documents at the customer site along with the current ticket.
- All users can ensure that customers receive information in their preferred language.

Note: Note: To send email in a language other than the default languages, you should use UTF-16 encoding for the template documents. For example, to send a mail in Cyrillic, encode the HTML template document in UTF-16.

- The Aurea CRM word Add-in supports the following features:
- Allows you to use the same set of methods used by Aurea CRM web.

- Template documents can use fields that are used to store information in Aurea CRM.
- You can generate the documents on CRM.pad using the same templates from Aurea CRM.
- Serial and single letter fields can be easily integrated into the templates using drag and drop features.
- You can create template documents in multiple languages.
- You can create formatted text, when merging documents and mail merge.
- Allows you to embed additional information in the documents like images and pictograms.

Installing Aurea CRM Add-in for Microsoft Word

The recommended way to install Aurea CRM Word Add-in is to use a network shared location containing the latest installation package. Ask your CRM administrator for the central shared location for the CRM Add-in for Word installation package. Using this process 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

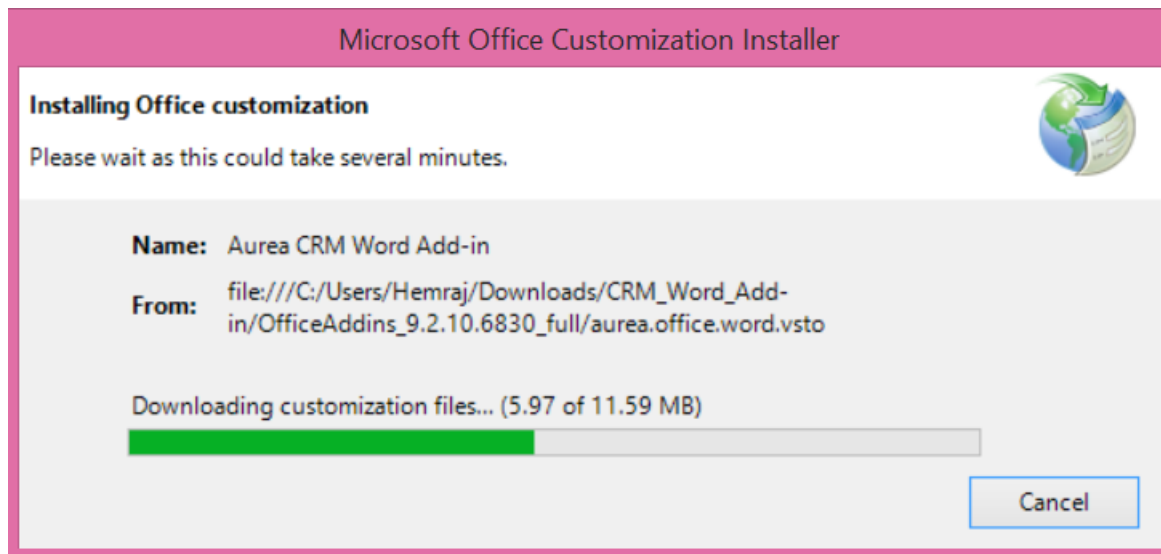
`<versionNo>`

will be the latest version available on the customer support site.

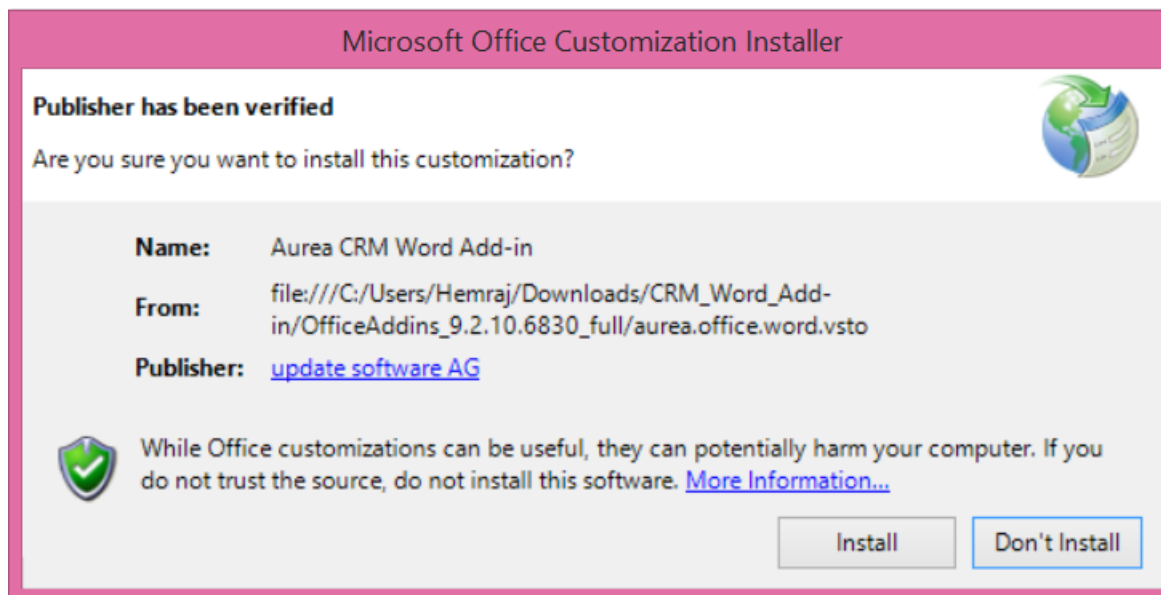
2. Double click

`aurea.office.word.vsto`

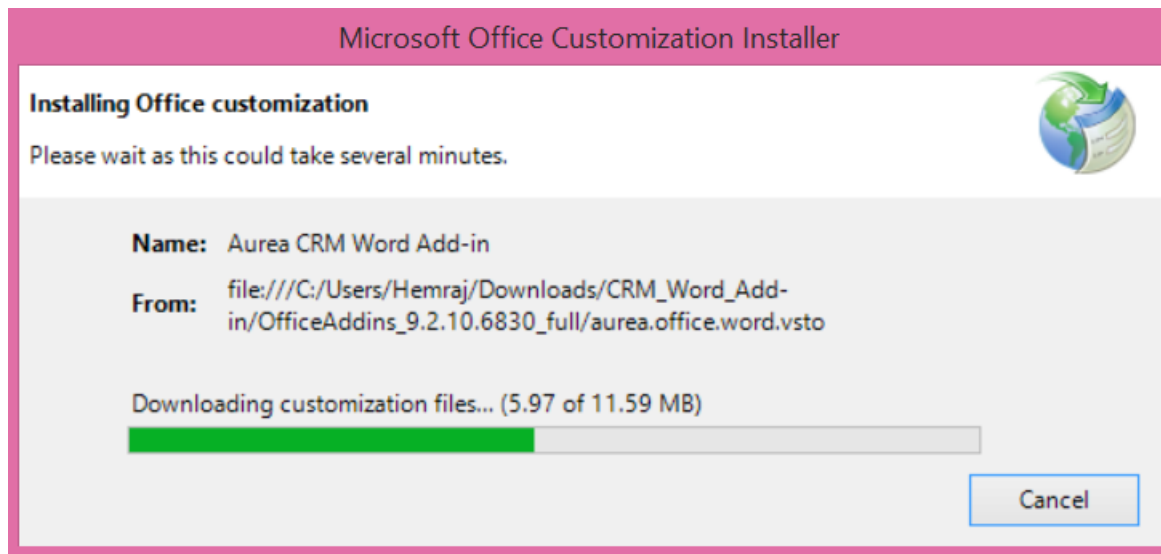
file in the shared location or the unzipped folder. The Microsoft Office Customization Installer window opens.



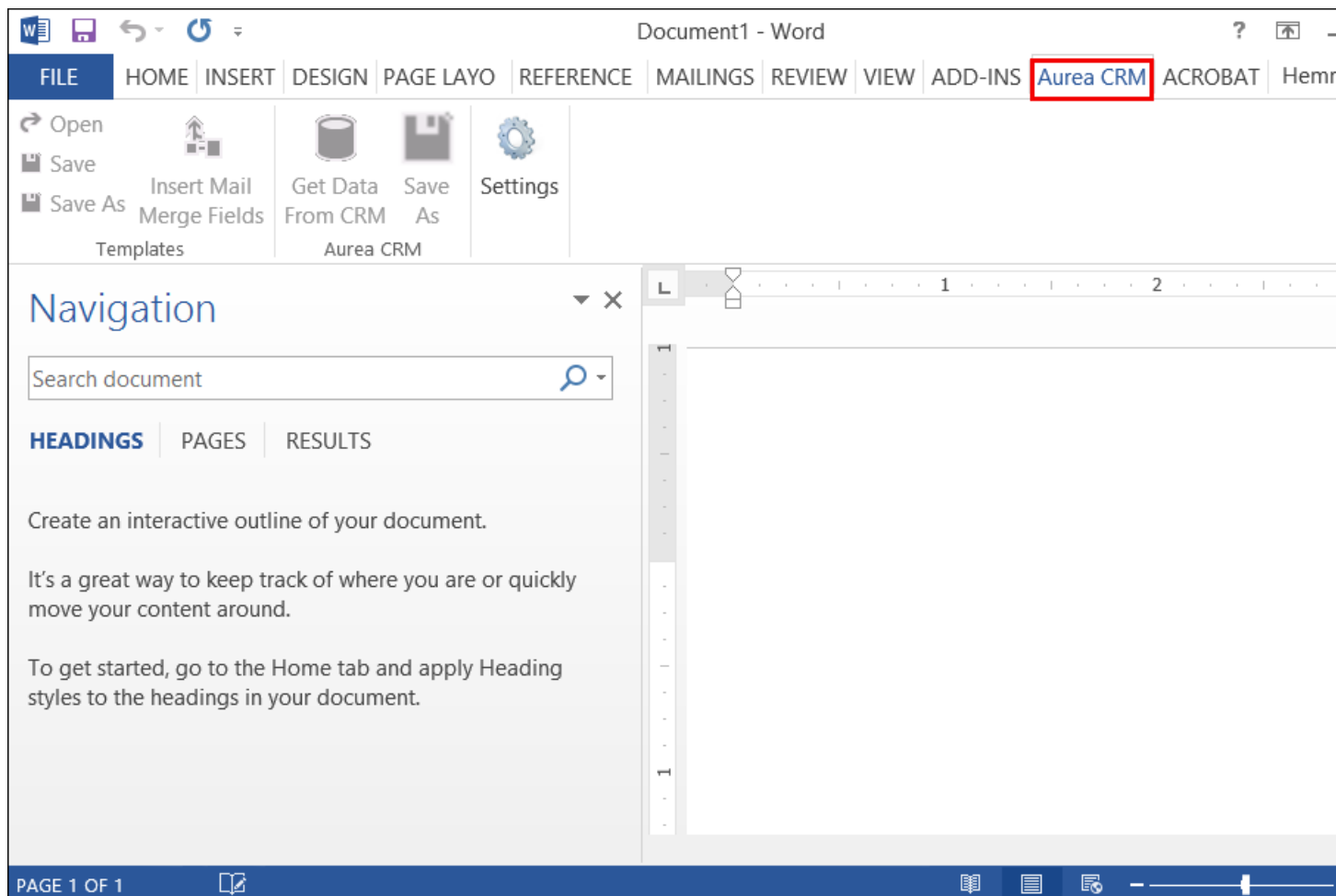
The installer verifies the publisher, in this case Aurea CRM, and then displays the following window.



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:

Select the **Use RAS authentication** checkbox.

Click **Open RAS Advanced Settings**. The following RAS settings dialog displays:

Enter the URL for the RAS server and the Application ID of Aurea CRM web instance on the RAS server.

Click **Close RAS advanced settings**.

1. Click **Log In**.
2. 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.

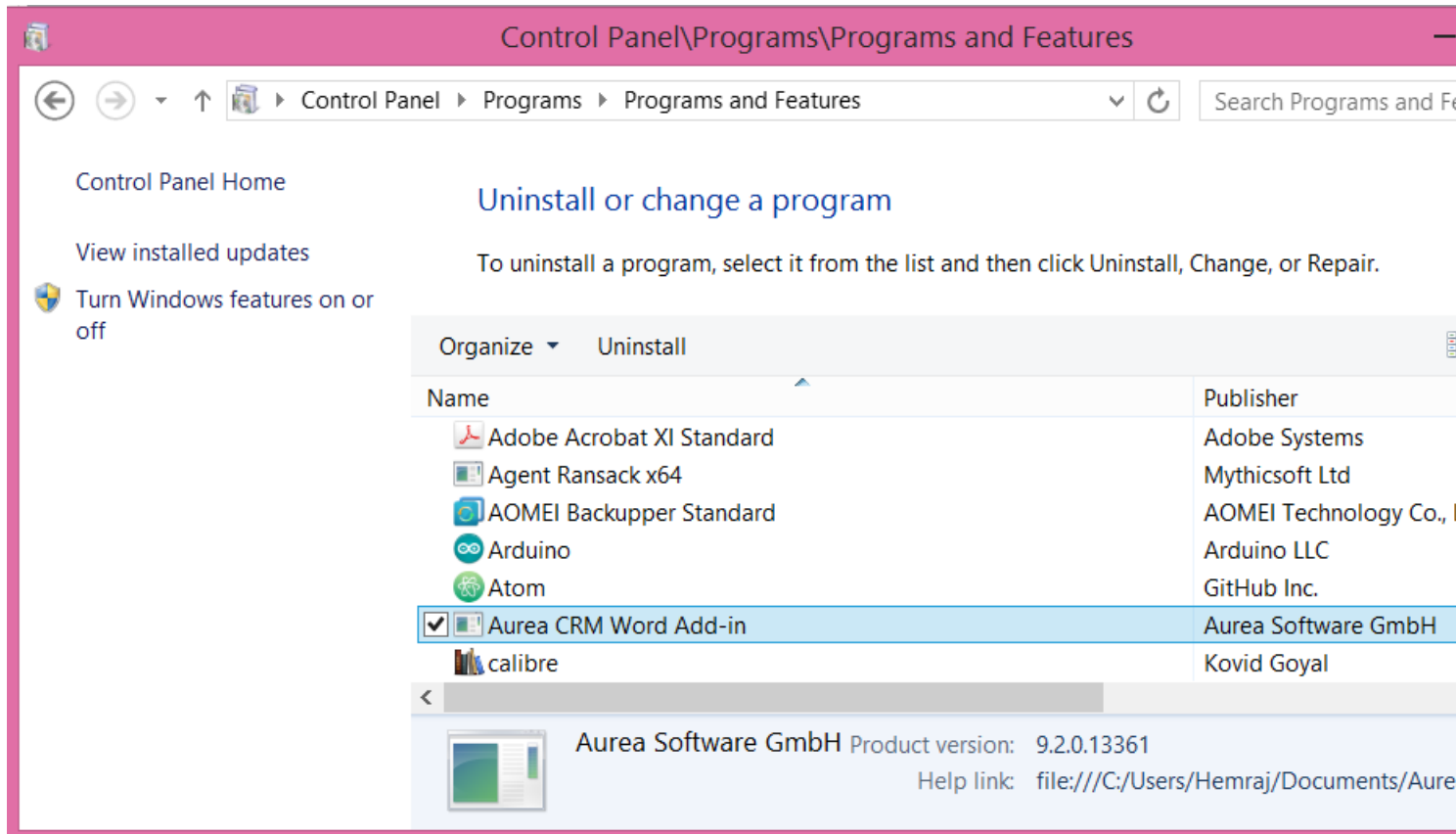
Note: Note: If there are multiple users on your machine, then you have to install your own version of CRM Word Add-in. This is a limitation of the ClickOnce solution.

Note: 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.

The image shows the Microsoft Word ribbon with the 'HOME' tab selected. The ribbon includes groups for Clipboard (Paste, Cut, Copy, Format Painter), Font (font face, size, bold, italic, underline, text color, background color), Paragraph (bullets, numbering, indent, alignment, line and paragraph spacing, text wrapping), and Styles. On the left, the 'Navigation' pane is open, showing a search bar and tabs for HEADINGS, PAGES, and RESULTS. A notification dialog box is overlaid on the right side of the document. The dialog has a pink header with the text 'Microsoft Office'. The main content of the dialog is titled 'Updating Office customization' and includes the text 'Please wait as this could take several minutes'. Below this, there are fields for 'Name: Aurea CRM Word Add-' and 'From: file:///C:/Users/Hemraj/in/shared/aurea.office.v'. At the bottom of the dialog, it says 'Downloading customization file' with a green progress bar.

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 on page 195.

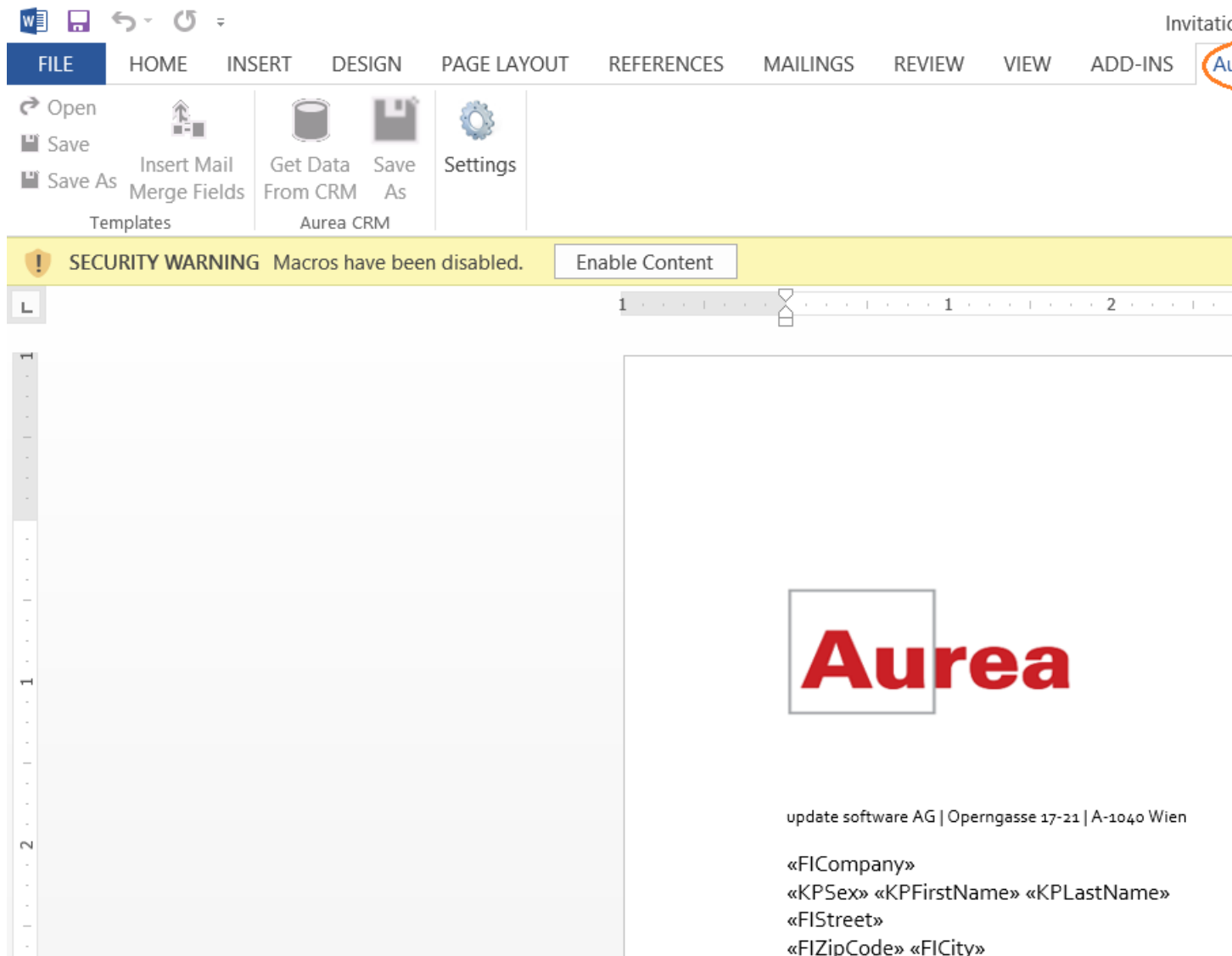
Creating and Saving new Document Template

You can create document templates for documents that you regularly use for recurring tasks.

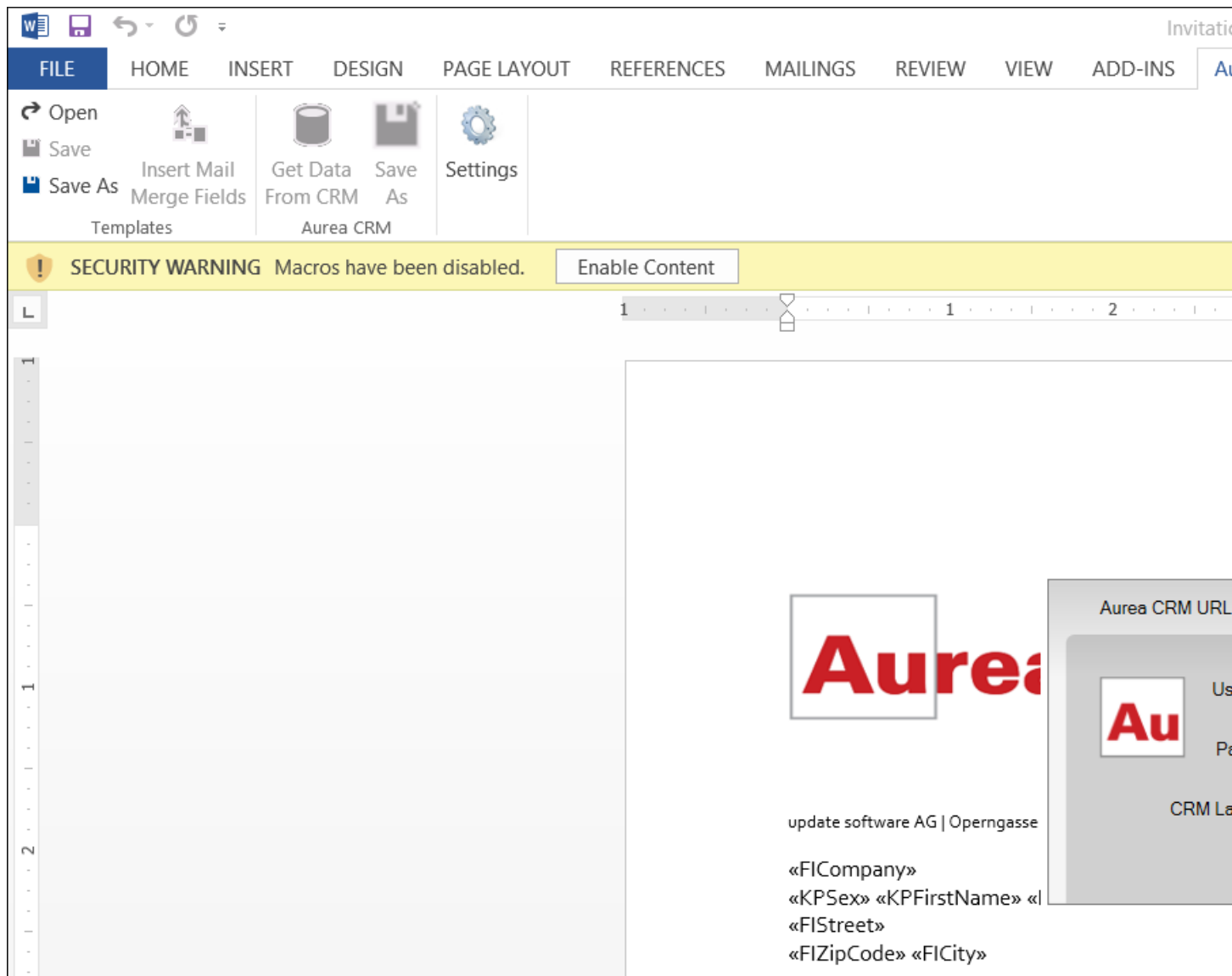
Note: To send an e-mail in a language other than the default languages, you should use UTF-16 encoding for the template document. For example, to send an e-mail in Cyrillic, encode the template document in UTF-16.

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.



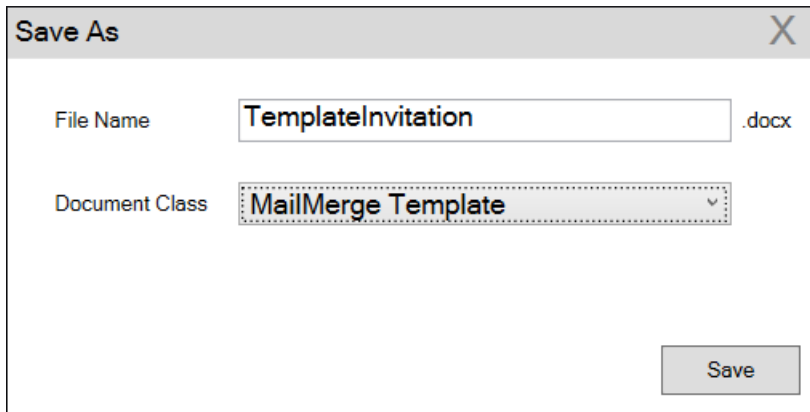
4. Click **Settings** to open the connection dialog.



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: Note: None of the other Aurea CRM sub-menu items are activated until you login.

6. Click **Save As** to open the dialog.
 - a. Give a **File Name** for the template document.
 - 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: 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: Note: After a template is saved to Aurea CRM, the **Insert Mail Merge Fields** menu item is activated.

8. Login to the Aurea CRM server with the same username and password and search for the document. The saved document should be visible in the search list as shown in the screenshot below:

The screenshot displays the 'Search Documents' interface in Aurea CRM. The search filters are as follows:

Field	Value
Title	Template
Document Class	Mail Merge Template
Erfasser	
Read only	
Keyword	
Created on	MM/DD/YYYY
Private	
With me	

Max. 15 records per page

Search Results

Title	Documen..	Keyword	Created by	Created on	Updated on	Created in M..
TemplateInvitation.docx	Mail Merg...		Simon Seller	05/12/2016	05/12/2016	web

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.

FILE HOME INSERT DESIGN PAGE LAY REFEREN MAILINGS REVIEW VIEW ADD-INS Aurea CR ACROBAT Hemraj...

Open Save Save As Insert Mail Merge Fields Get Data From CRM Save As Settings

Templates Aurea CRM

SECURITY WARNING Macros have been disabled. Enable Content

1 2 3 4

Aurea

update software AG | Operngasse 17-21 | A-1040 Wien

«FICompany»
«KPSEX» «KPFirstName» «KPLastName»
«FISStreet»
«FIZipCode» «FICity»

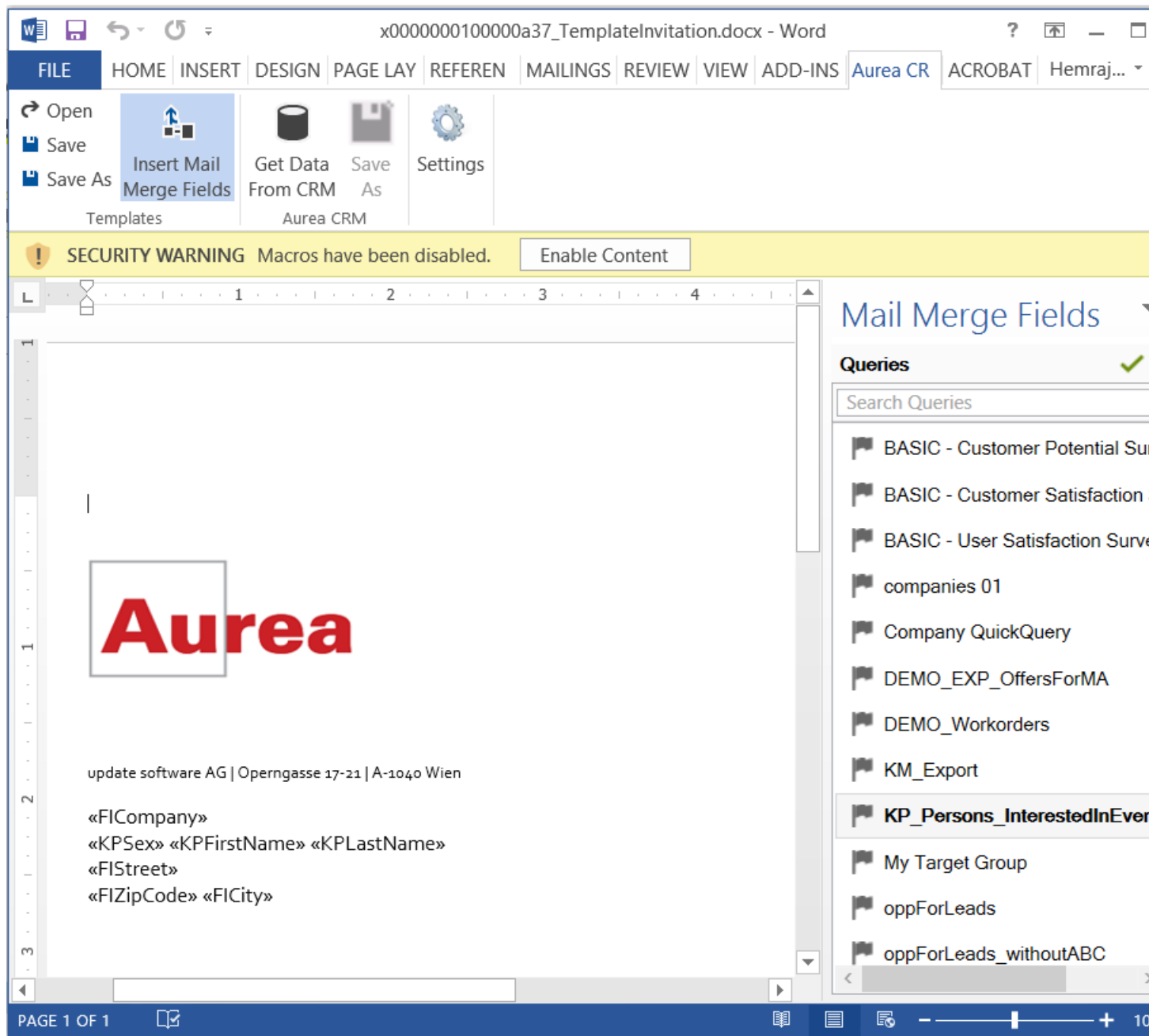
PAGE 1 OF 1

Mail Merge Fields

Query : KP_Persons_Int


- CONTACT PERSON [KP]
 - Form of address [KPSe
 - Acad. Title [KPQualific
 - Last Name [KPLastNar
 - First Name [KPFirstNar
 - E-mail [KPE-mail1]
 - Department [KPDivision
 - Position [KPPosition]
 - Function [KPFfunction]
- COMPANY [FI]
 - Company [FIComp
 - Country [FICountry
 - Postal Code [FIZipC
 - City [FICity]
 - Street [FISStreet]
- SALES GROUP [S]
 - Rep 1 ID [SBR
 - REP [ID]
 - Name [IDNa
- INTEREST [IT]
 - Interest Group [
 - Interest [ITInter



10. Click **Queries** () to list existing queries.



11. You can create a new query by selecting an existing query then modifying, and saving it.

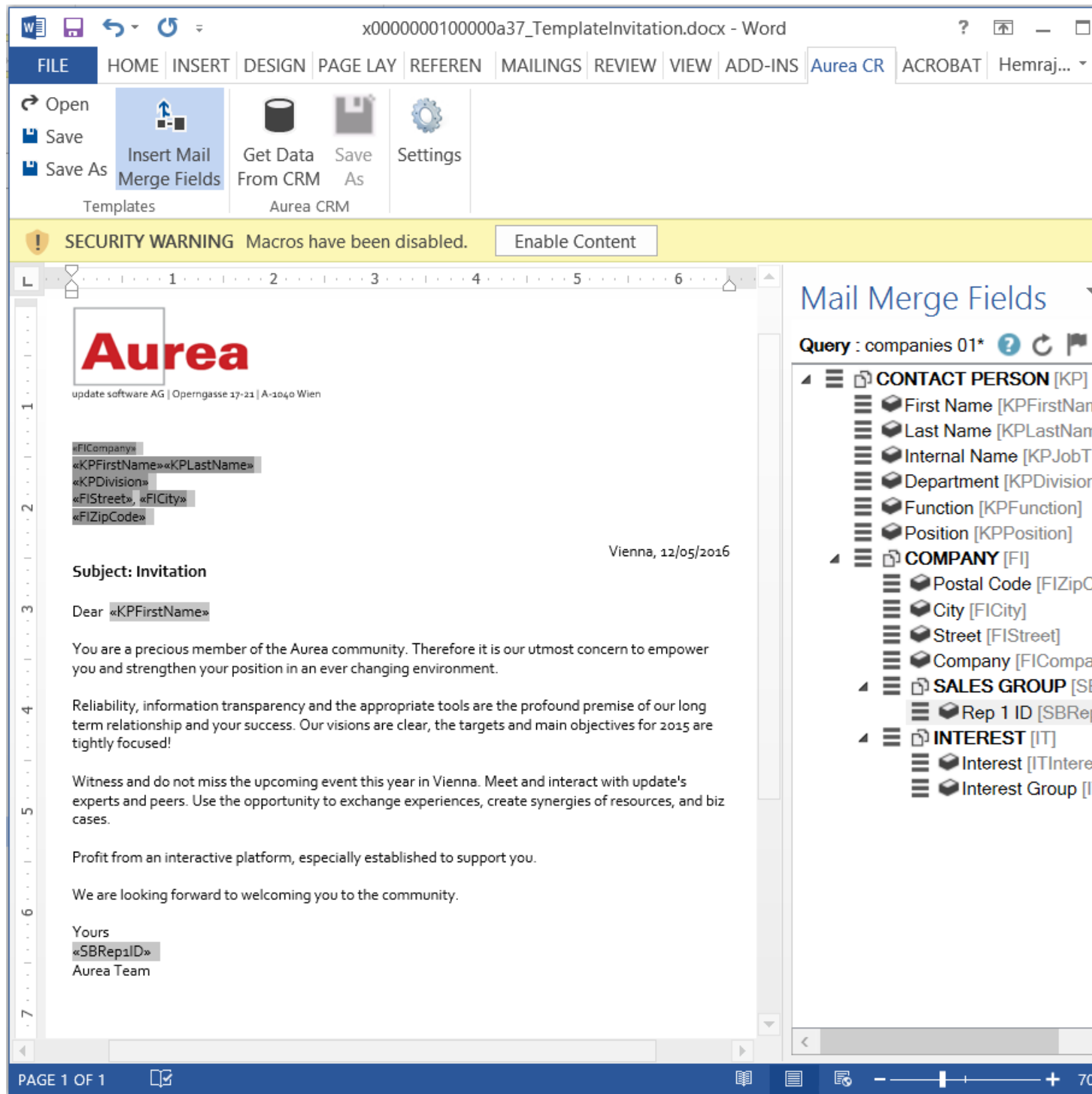
To create a new query, perform the following:

- 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**.
- c. Click **Add Info Area** to open the **Select info Area** dialog.

-
- d. Select the infoarea of interest and select the required fields from that info area. For this example, type KP and select the **Contact Person** info area. The **Select Field(s) in Info Area: Contact Person** dialog box opens.
 - e. Select the required fields in the **Available Fields pane** and click  to move it to the **Selected Fields pane**. Click **OK**. The selected infoarea and fields are displayed in the Mail Merge Fields.
 - f. To add more info areas, right click on an infoarea and select **Add Info area**. Selecting the infoarea opens a Relationships dialog. You can define the type of relationship between the existing infoarea and the new one you add.
 - g. Select the required fields from for the new infoarea. The following screenshot shows the **Mail Merge Fields** with the selected info areas and parameters.
 - h. Click  to save the modified query.

Note: Note: This will overwrite the before selected query and the changes will be done in the CRM solution. Please ensure that the query can be modified to your requirements to avoid conflicts with queries set up by other users.

- 12.To populate the template document with the fields from infoarea records, drag and drop the fields in the required places. The following screenshot shows the template document enriched with fields.



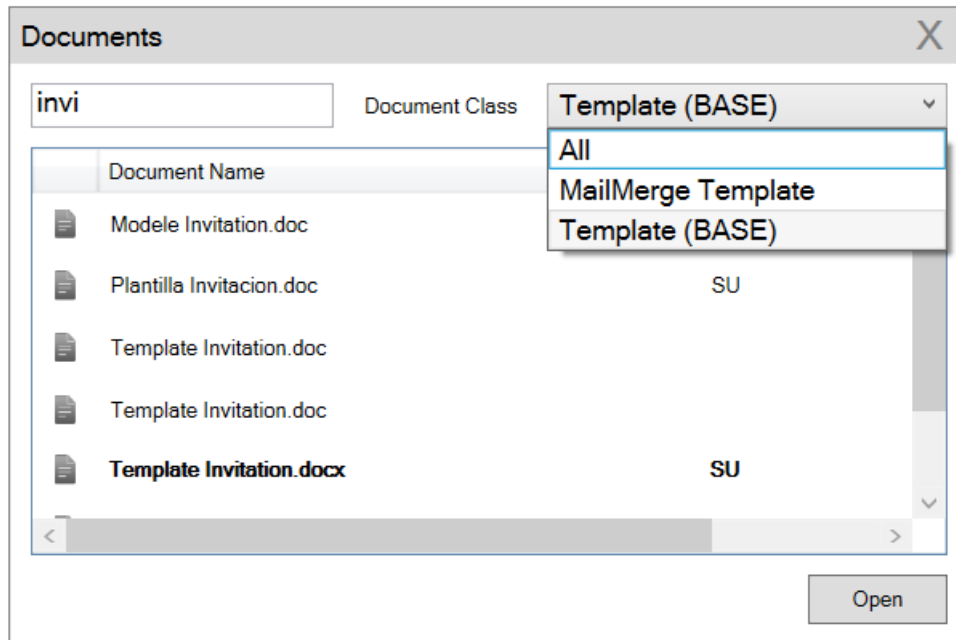
- Click **Save**. The template document will be saved to the D1 infoarea on Aurea CRM server.

Opening and Editing document templates

You can open an existing template and edit and save it. You can also rename it and save it with a different template name.

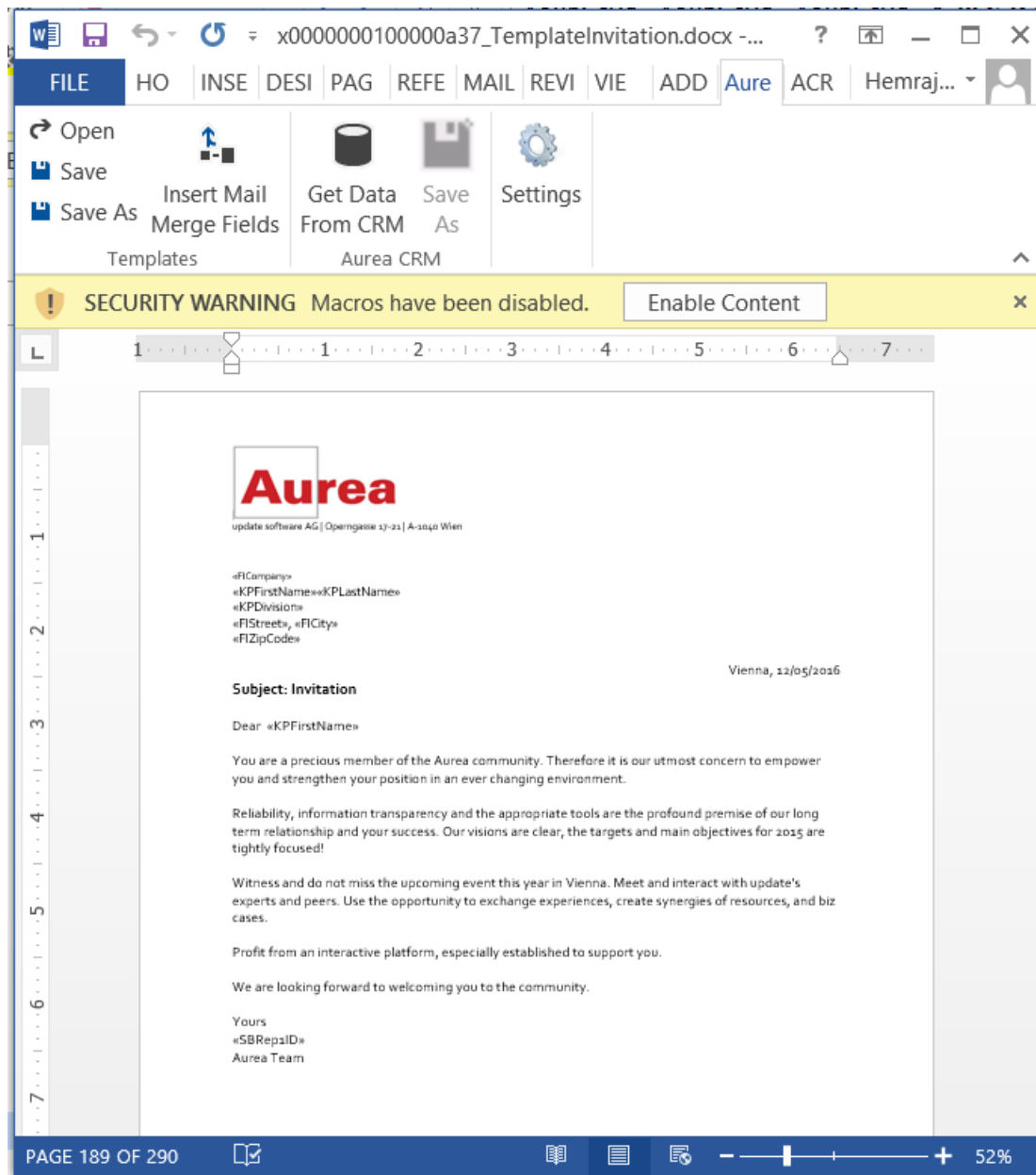
To open an existing template:

1. In the Microsoft Word, click on the **Aurea CRM** menu item.
2. Click **Settings**, and login to the Aurea CRM server.
3. Click **Open**. The **Documents** dialog is displayed.

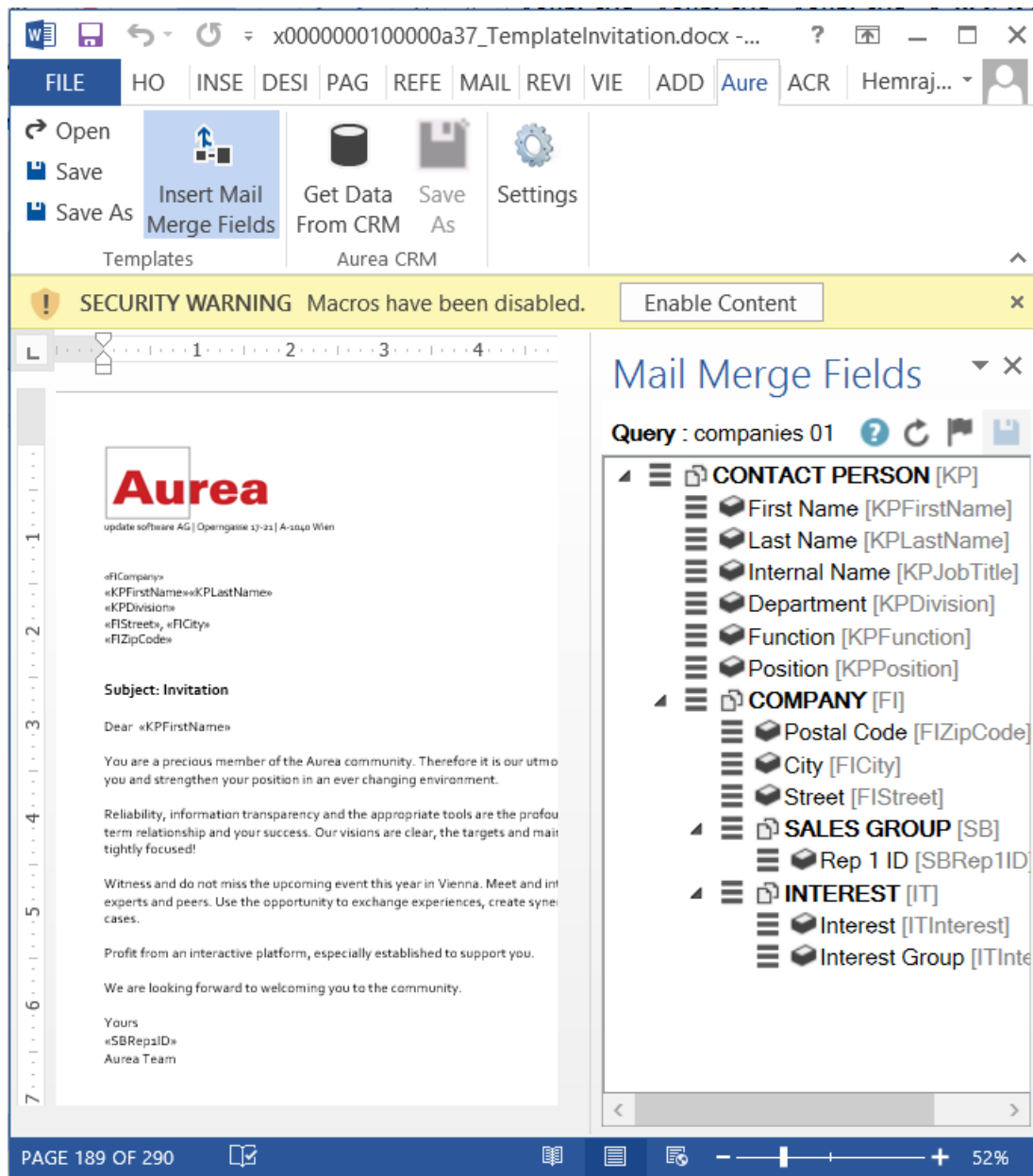


You can type in the text box to filter for a specific document. You can also select the name of the template document. In the screenshot above, **Template (BASE)** was the document class selected and **invi** was typed in the filter text box, to find the **Template Invitation.docx** template.

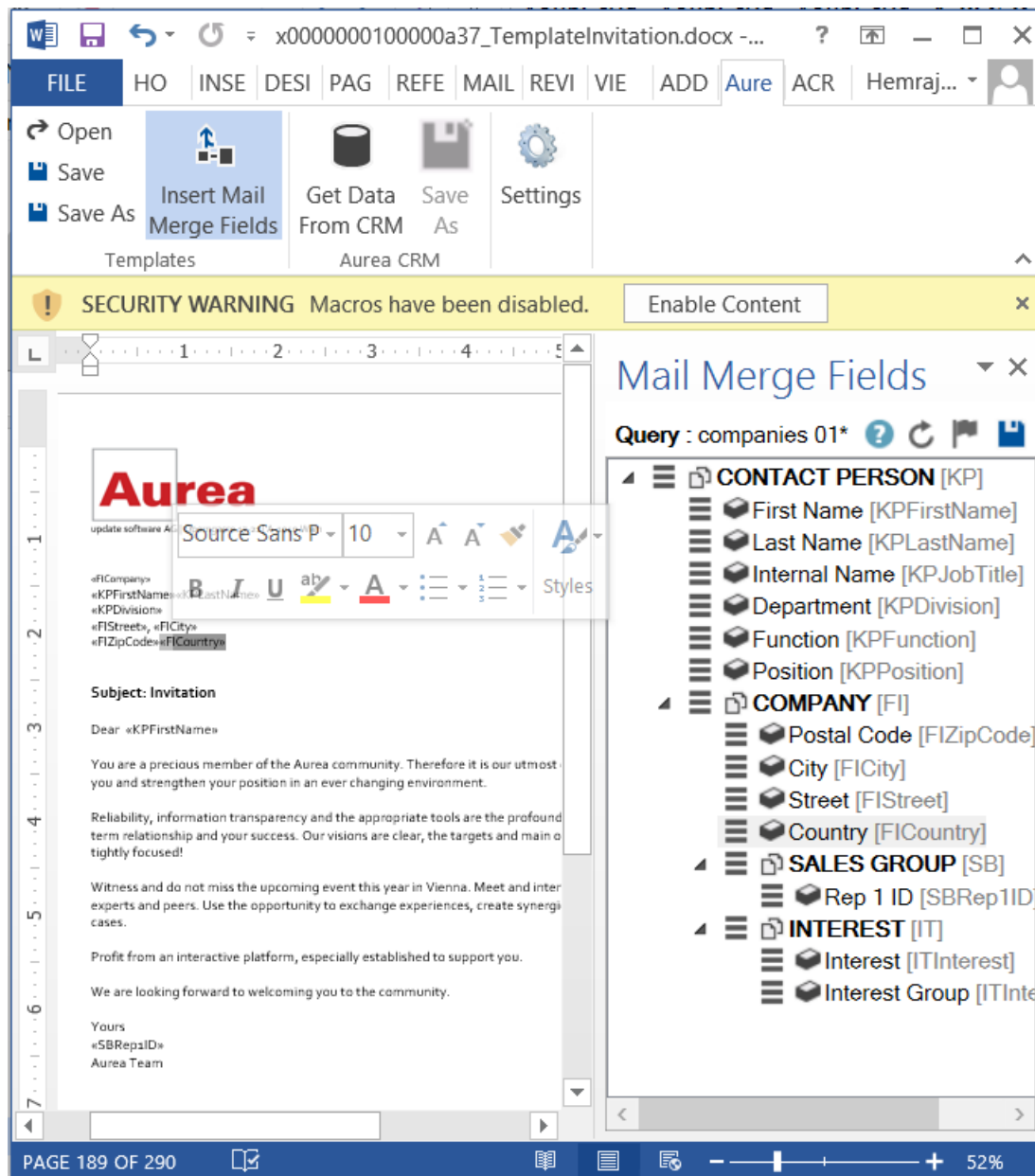
4. The selected template document is retrieved from the Server and loaded into Microsoft Word. For example, the screenshot below shows the **Template Invitation.docx**.



5. You can edit the template document and make modifications. For example, in the Invitation template.docx, you might want to add the country name, after the City name.
6. Click Insert Mail Merge Fields. The Mail Merge Fields column displaying the fields from the selected infoarea is displayed to the right of the editing pane. See the screenshot below.



- To add a field from the infoarea to the template document, select the field and drag and drop it in the document at the appropriate position. For example, the Country field was selected and added to the document. See the screenshot below.



8. Click **Save**. The template document is saved to the D1 area of Aurea CRM.

Mail Merge Using Document Templates

To generate a document for several persons using the document template:

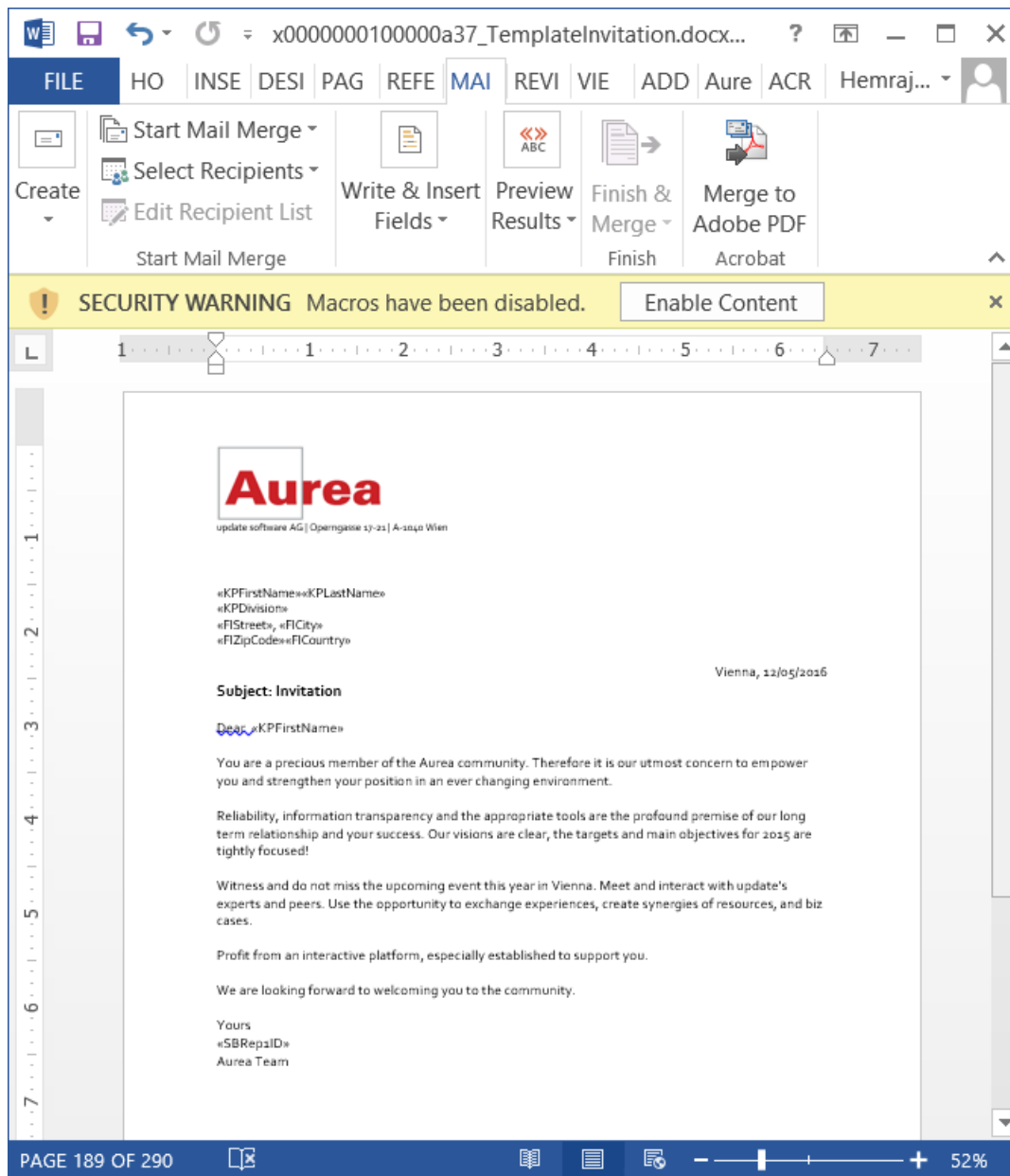
1. From the Aurea CRM menu, login to the CRM server and open the Mail Merge template document. Edit the template document if necessary. For more information, see >> Opening and Editing document templates.
2. Click **Get Data From CRM**. The Select Records dialog displays single record or a list of records, showing the data fields you selected. You can then select the data you want use with the document template.

Select Records X

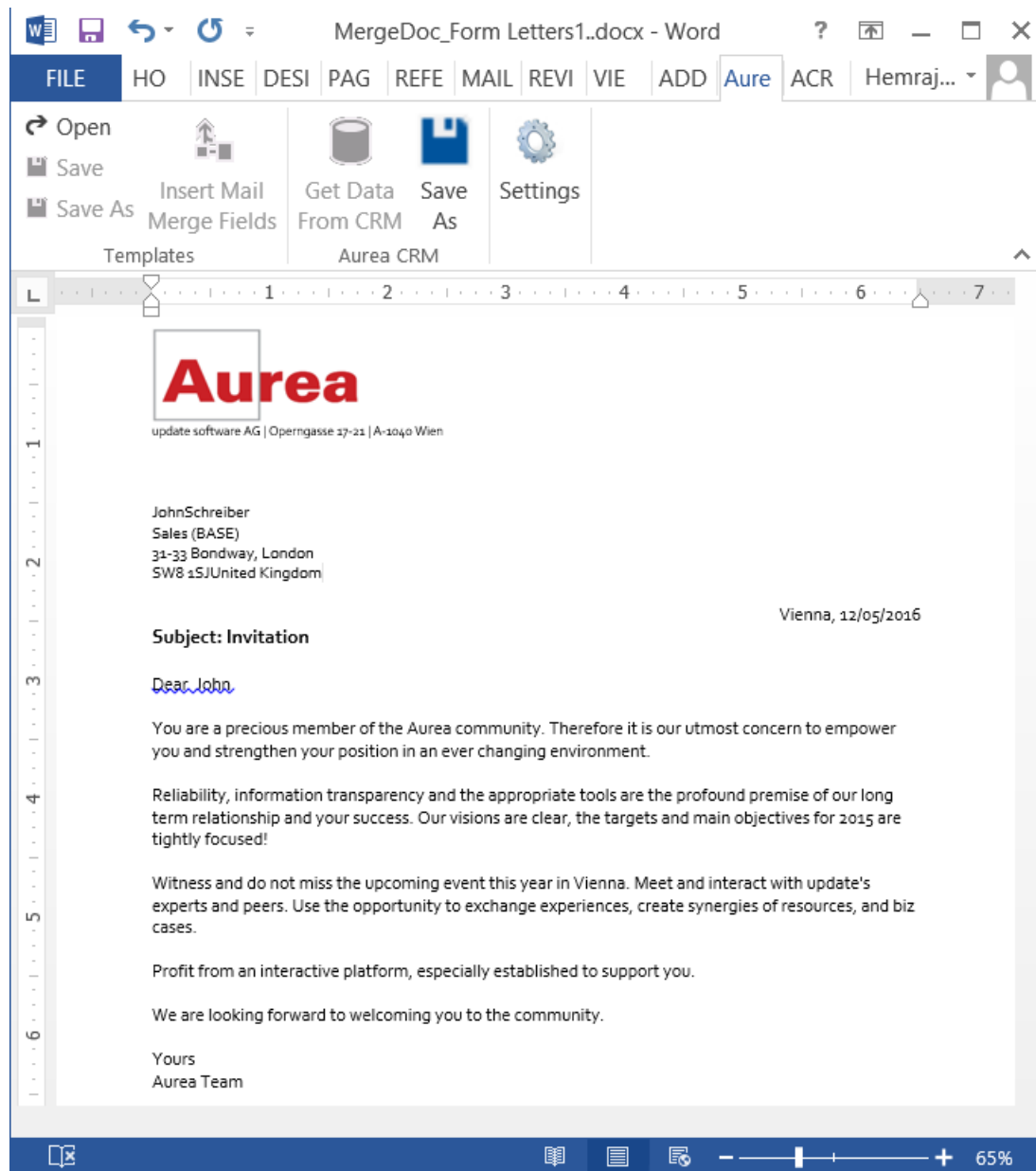
<input type="checkbox"/>	First Name	Last Name	Internal Name	Department	Department 2	Department 3	Department
<input checked="" type="checkbox"/>	Ron	Anderson	Managing Director	Sales (BASE)			
<input type="checkbox"/>	Ron	Anderson	Managing Director	Sales (BASE)			
<input type="checkbox"/>	Ron	Anderson	Managing Director	Sales (BASE)			
<input type="checkbox"/>	Ron	Anderson	Managing Director	Sales (BASE)			
<input checked="" type="checkbox"/>	Charles	Darwin	Director	Management Board (BASE)			
<input type="checkbox"/>	Charles	Darwin	Director	Management Board (BASE)			
<input type="checkbox"/>	Charles	Darwin	Director	Management Board (BASE)			
<input type="checkbox"/>	Charles	Darwin	Director	Management Board (BASE)			
<input checked="" type="checkbox"/>	Denise	Paltrow	Program Manager	Marketing (BASE)			
<input type="checkbox"/>	Denise	Paltrow	Program Manager	Marketing (BASE)			

[Start Mail Merge](#)

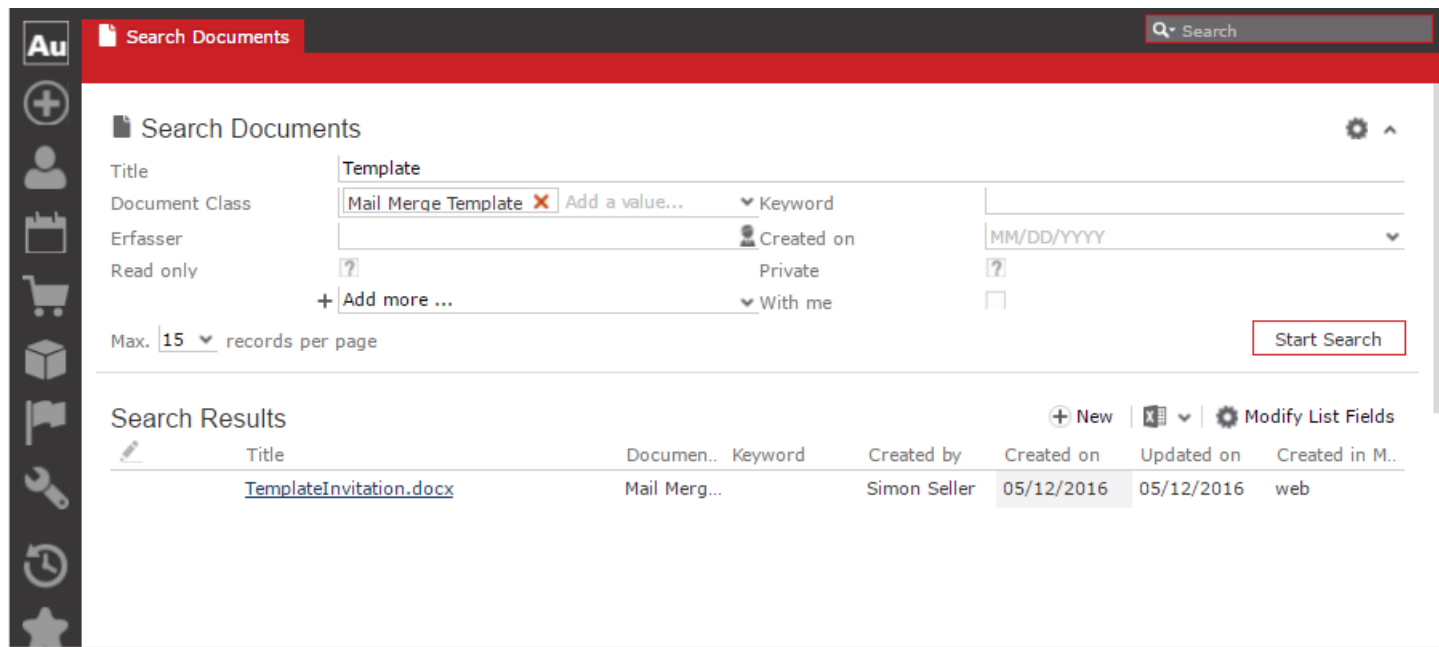
3. Click **Start Mail Merge**. The document is opened in a new Window.



- To see the individual documents populated with the field values, select the required recipient from the **Preview Results** menu. The document is populated with the required information. The following screenshot shows the merged fields with their values populated and highlighted.



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.

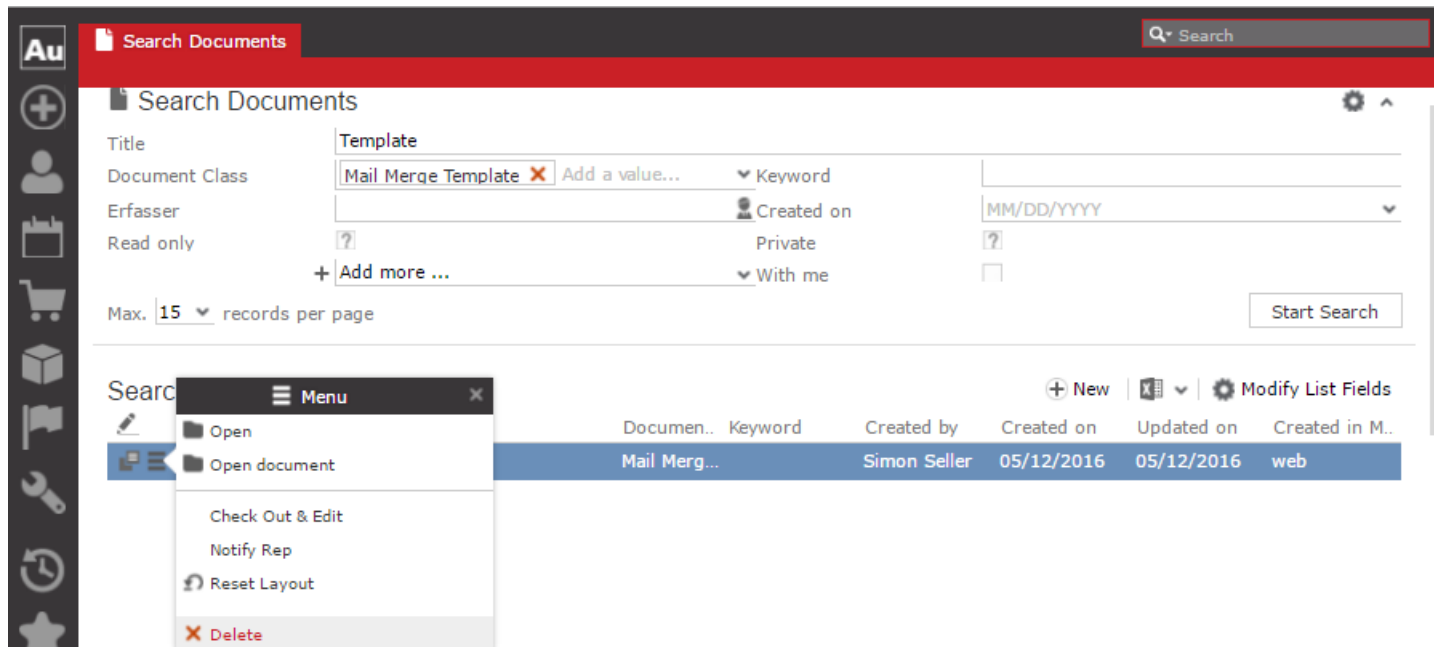


Deleting a Template Document

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.

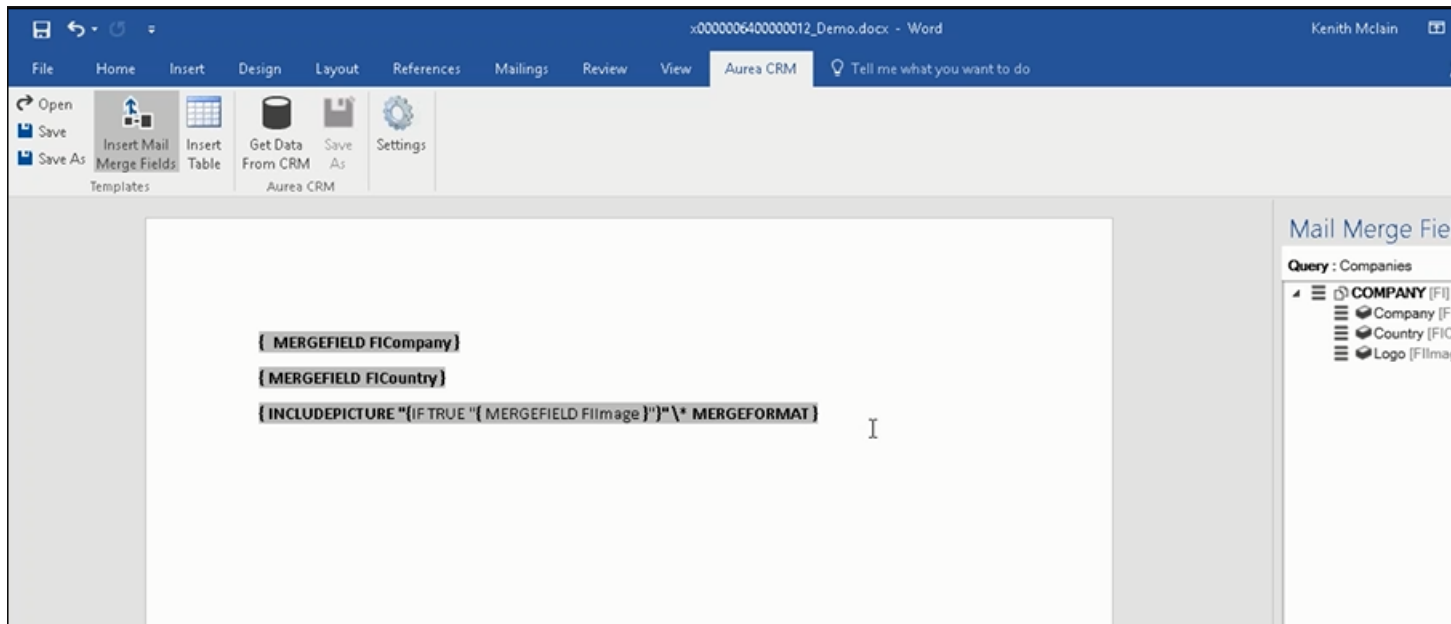


Working with Images in the Template Document

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 200. In step eleven you have to create a query that will retrieve the fields from the infoarea that has the images you require. For this example steps, we have created a simple query to retrieve the Company infoarea records that has the Logo field containing images of company logos (F1Image), the name of the company (F1Company), and the country (F1Country) it is located in.
2. Add the three fields the company name, country, and logo fields to the template document. The Word add-in automatically detects that the added field is an image field and adds the appropriate code, see the screenshot below.

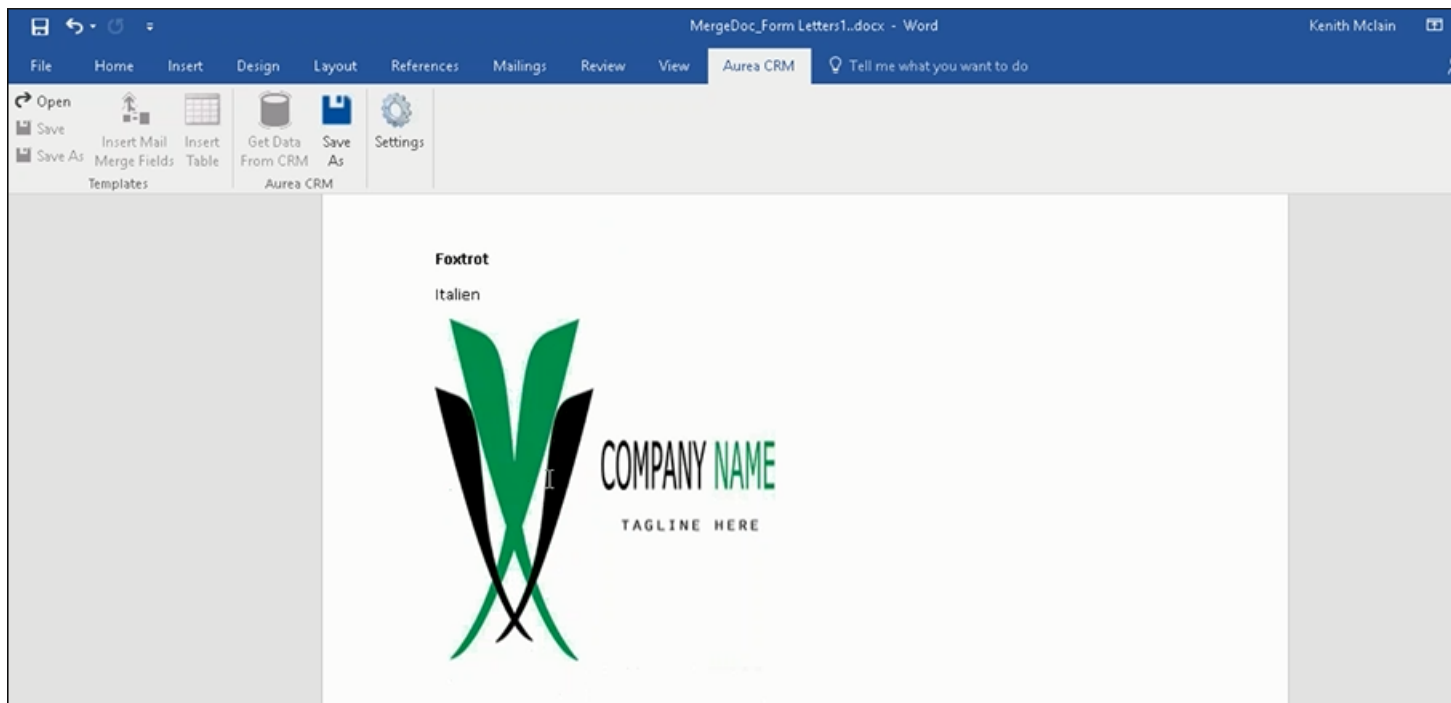


3. Format the fields to the desired fonts, bold it and other changes you desire, as you would a normal a normal word document.

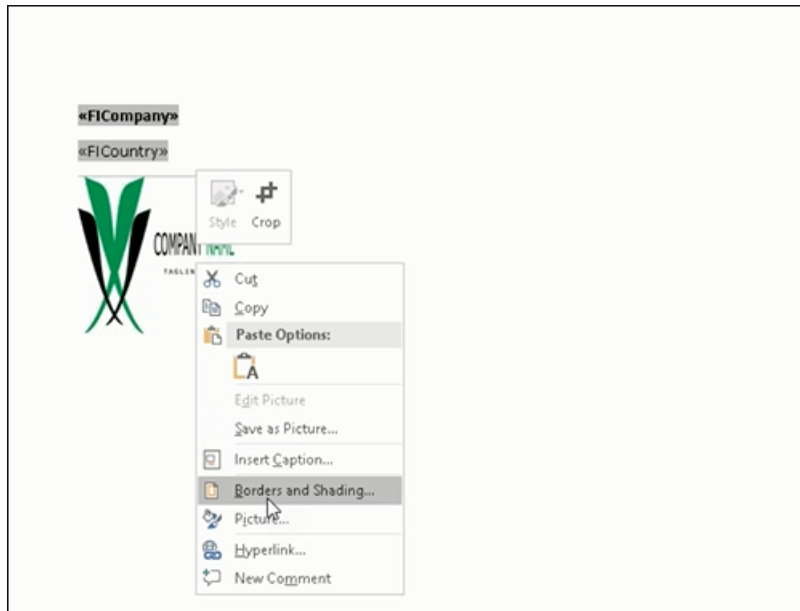


4. Click  to execute the mail merge and fetch the data and populate the record field and create the pages for each record set in the CRM database.

The screenshot below shows one of the pages generated.



- To resize the displayed image switch to the template document and click on the logo record, a sample image is displayed, resize it as you would resize an image in a word document.
- To add a border, right click on the image in the template document and select Borders and Shadings as shown in the screenshot below.

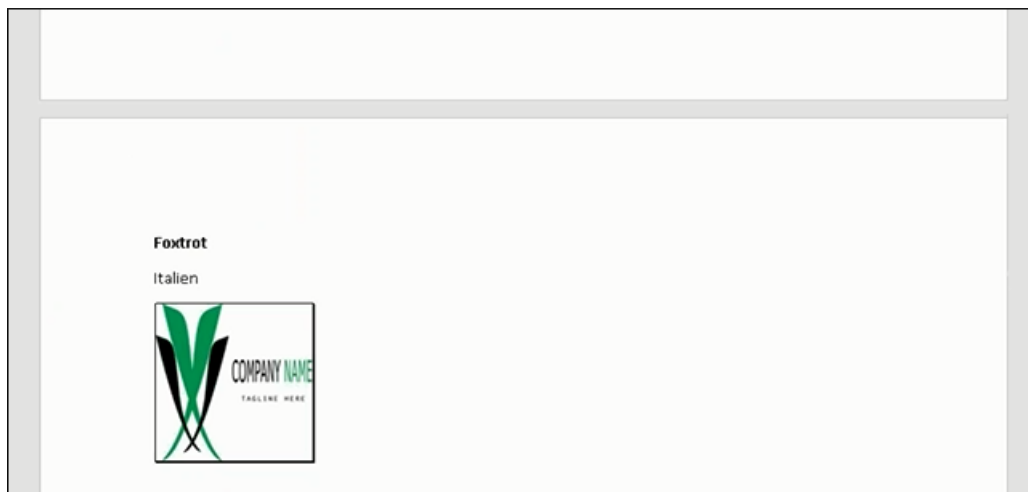


- Add a border using the standard Borders dialog in MS Word.



- 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.

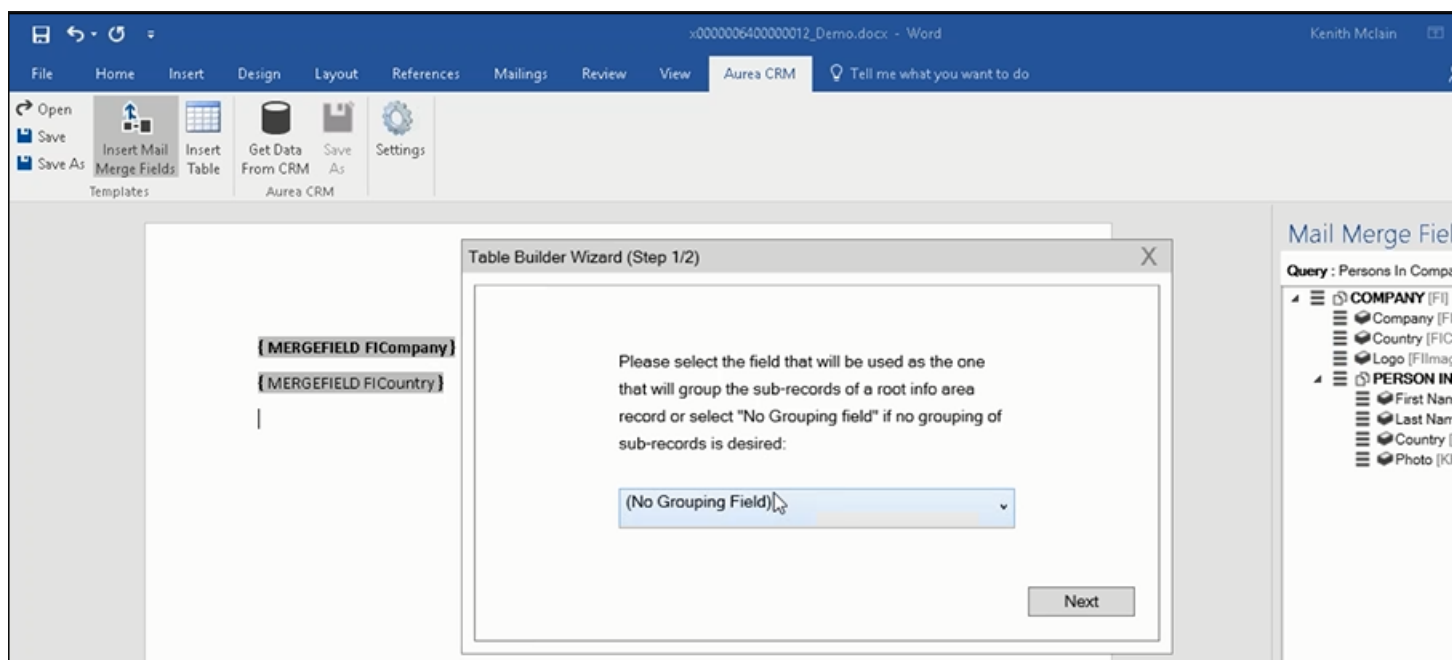
For example, if you want to group all the employees of a company into separate documents, you have to use the Insert Table feature. If you have two companies and three employees in each company then a simple mail merge would create six pages containing the company name and one employee name. If you use 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 386. In step eleven you have to create a query that will retrieve the fields from the infoarea that has the information that you want to tabulate. For this example steps, we have created a complex query to retrieve the Company infoarea records along with its employee information.
2. From the Mail Merge Fields add the Company name and the Country fields to the template document.
3. Click Insert Table.

The **Table Builder Wizard (Step1/2)** dialog displays. See the screenshot below.



4. You can add tables to the template document based on a grouping field or without a grouping field. A grouping field groups the sub-records of a selected parent record.

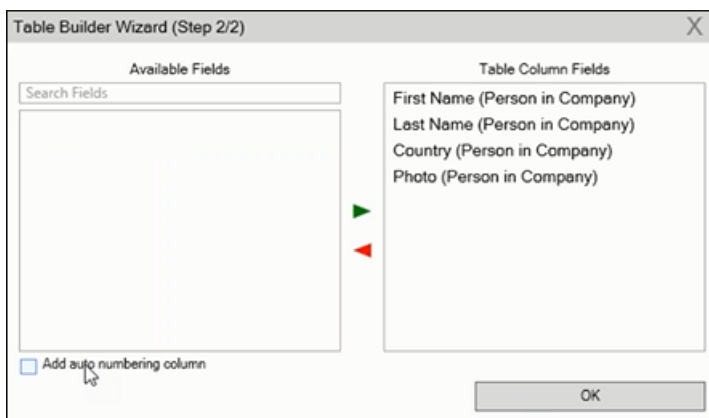
To add a table based on a grouping field, go to step 5.

To add a table without grouping fields, perform the following steps:

- a. Click Next. The **Table Builder Wizard (Step 2/2)** dialog displays.



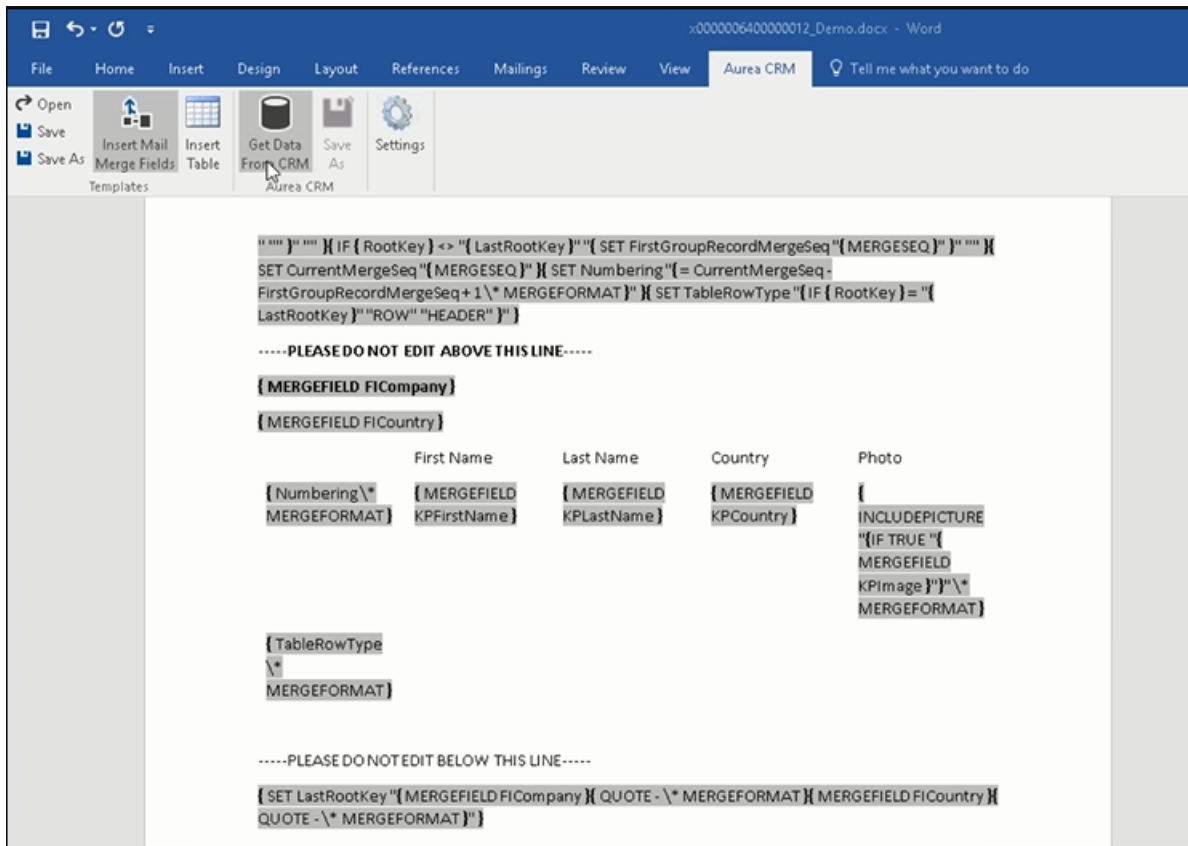
- b. The **Available Fields** pane in the dialog displays the records that you can add to your table.
- c. Select the records that you want to add to your table and click ► to select the required records. The selected records are added to the **Table Column Fields** pane.




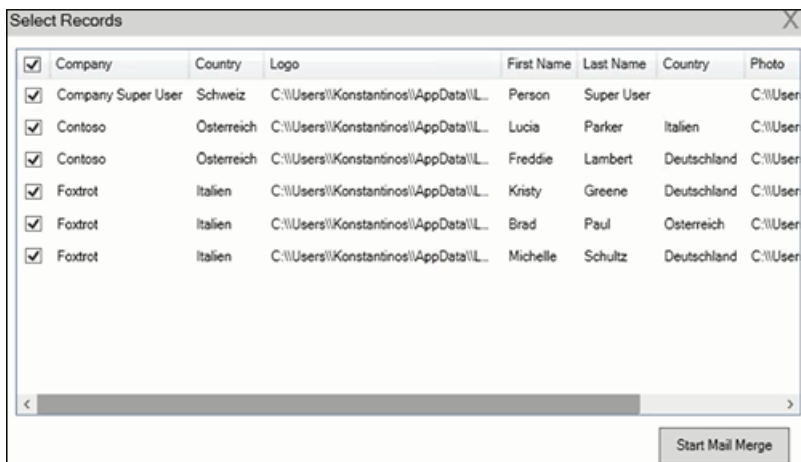
- d. Click **Add auto numbering column** to add the numbering column for all the employees that get populated for each company in the result documents.

Note: 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.



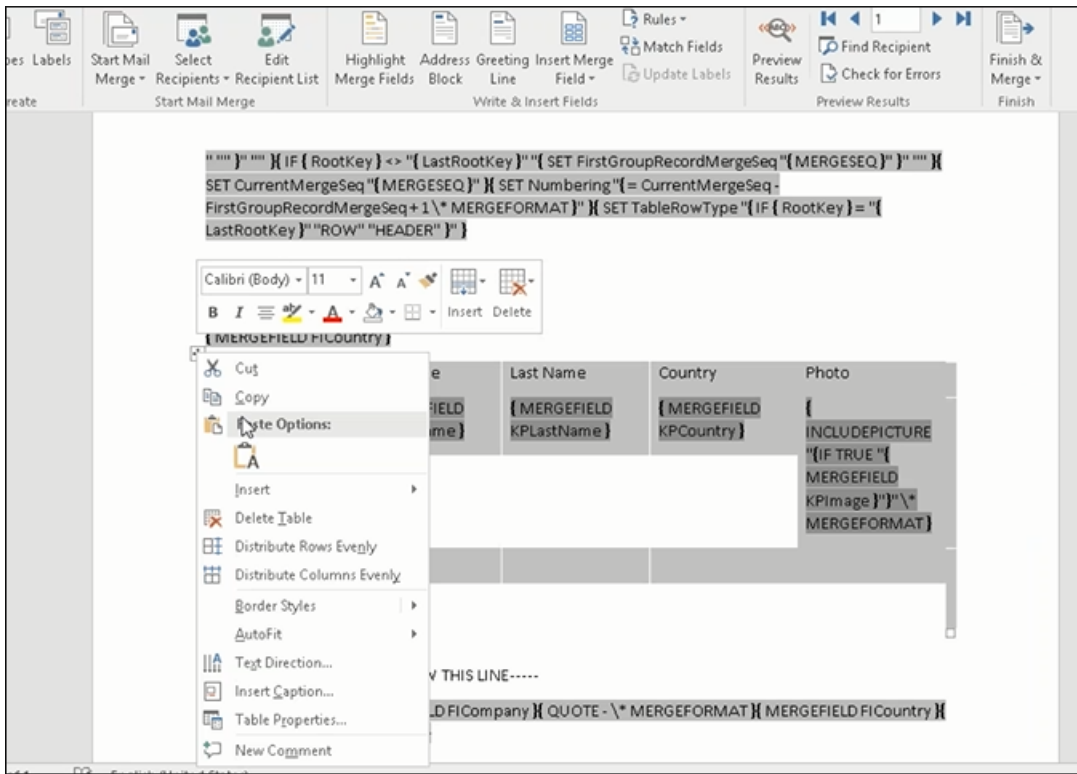
- h. Click **Start Mail Merge**.
- i. The results documents are created. Sample pages containing the tables for companies are shown below.

Contoso				
Österreich				
	First Name	Last Name	Country	Photo
1	Lucia	Parker	Italien	
2	Freddie	Lambert	Deutschland	

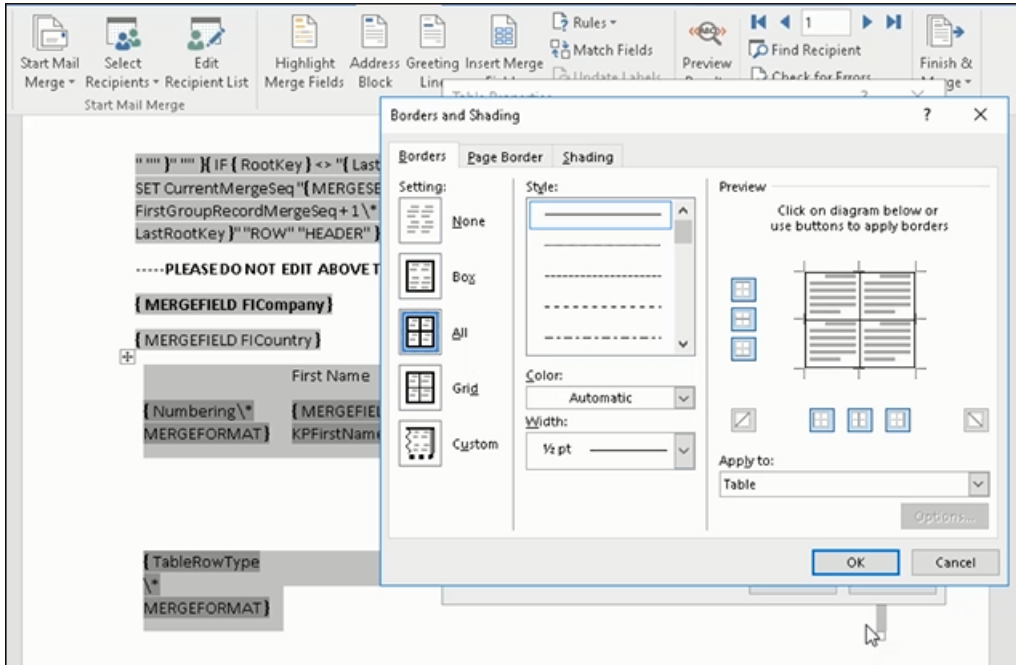
Another page:

Foxtrot				
Italien				
	First Name	Last Name	Country	Photo
1	Kristy	Greene	Deutschland	
2	Brad	Paul	Österreich	
3	Michelle	Schultz	Deutschland	

- j. You can add formatting to the table by selecting the table format in the template document and add the required formatting.
- k. To format the table, go to the template document, right click the table and select **Table Properties**.



- l. In this example, we 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.


+ {MERGEFIELD FICountry}				
	First Name	Last Name	Country	Photo
{Numbering\}* MERGEFORMAT}	{MERGEFIELD KPFIRSTNAME}	{MERGEFIELD KPLASTNAME}	{MERGEFIELD KPCOUNTRY}	{ INCLUDEPICTURE "{{IF TRUE " MERGEFIELD KPIIMAGE}}"\}* MERGEFORMAT}
{TableRowType \}* MERGEFORMAT}			I	

- n. You can resize the image. Click the image record in the table and resize the image visible in the table cell. See the screenshot below.


-----PLEASE DO NOT EDIT ABOVE THIS LINE-----

«FICompany»



«FICountry»

	First Name	Last Name	Country	Photo
1	«KPFIRSTNAME»	«KPLASTNAME»	«KPCOUNTRY»	
HEADER				

-----PLEASE DO NOT EDIT BELOW THIS LINE-----

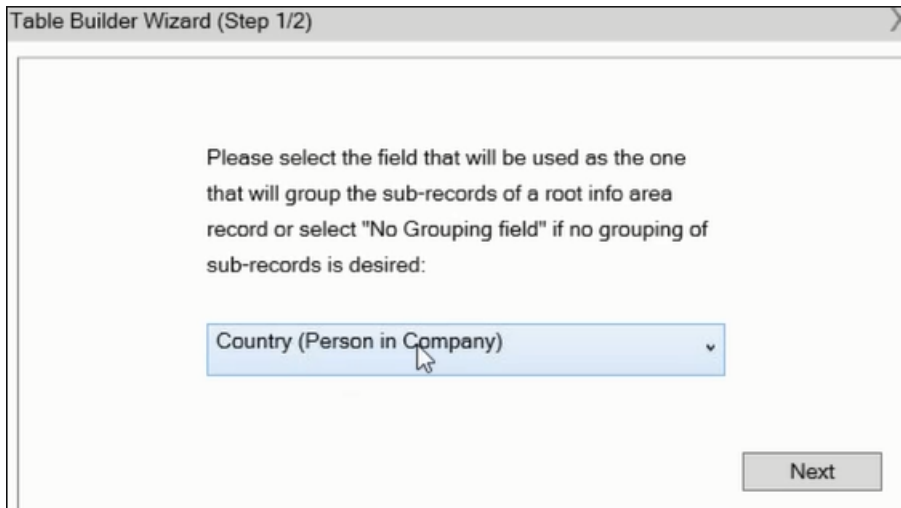
- o. To see the result of resizing, click  to start the mail merge. A result page is shown in the screenshot below. The images are displayed in the size specified in the template document.

Contoso
Österreich

	First Name	Last Name	Country	Photo
1	Lucia	Parker	Italien	
2	Freddie	Lambert	Deutschland	

This completes the steps required to generate documents without using a grouping field.

5. To create a template document using a grouping field, perform the following steps:
 - a. Select a grouping field. The following screenshot shows the **Country (Person in Company)** field selected.



- b. Click **Next**. The **Table Builder Wizard (Step 2/2)** dialog displays.

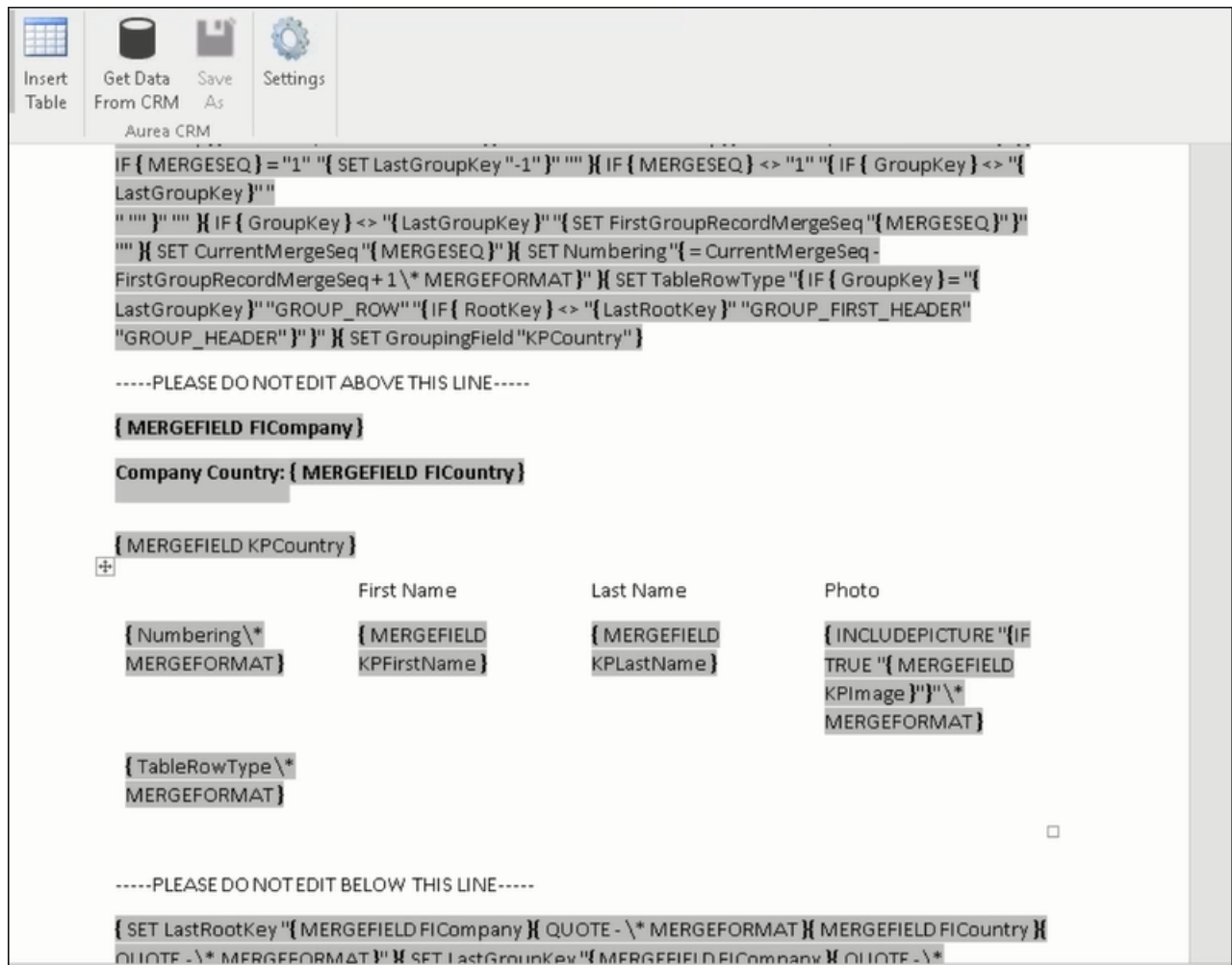


Note: Note: This grouping fields does not show Company record in the available fields as it is not a sub-record of the selected grouping field, **Country (Person in Company)** field.

- c. Select the records you want to add to the table columns and click ► to add the records to the **Table Column Fields**. Click **OK**.

The table wizard generated the required code in the template document.


- d. Add the Company name and the Company Country records to the template document. See the screenshot below.

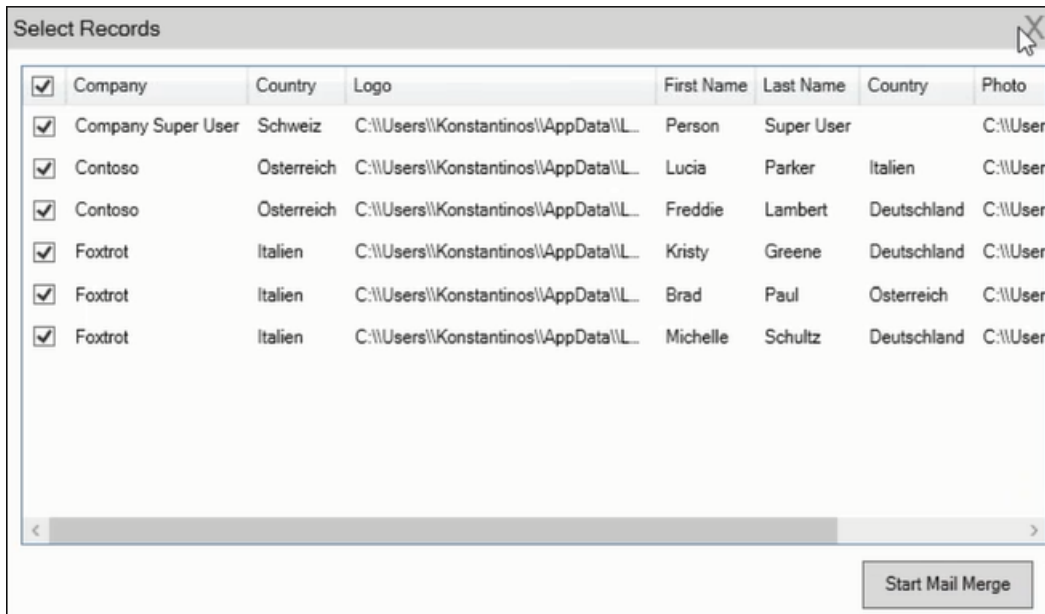


The screenshot shows the Aurea CRM mail merge editor interface. At the top, there are icons for 'Insert Table', 'Get Data From CRM', 'Save As', and 'Settings'. Below these icons, the text 'Aurea CRM' is displayed. The main area contains a large block of code for mail merge, including conditional logic for group keys and merge sequences. Below the code, there are two lines of text: '-----PLEASE DO NOT EDIT ABOVE THIS LINE-----' and '-----PLEASE DO NOT EDIT BELOW THIS LINE-----'. In the center, there is a table structure with the following content:

	First Name	Last Name	Photo
{ Numbering* MERGEFORMAT }	{ MERGEFIELD KPFirstName }	{ MERGEFIELD KPLastName }	{ INCLUDEPICTURE "{ MERGEFIELD KPIImage }" * MERGEFORMAT }
{ TableRowType* MERGEFORMAT }			

At the bottom of the code block, there are two lines of code: { SET LastRootKey "{ MERGEFIELD FICompany } QUOTE - * MERGEFORMAT { MERGEFIELD FICountry } QUOTE - * MERGEFORMAT } } { SET LastGroupKey "{ MERGEFIELD FICompany } QUOTE - * MERGEFORMAT }

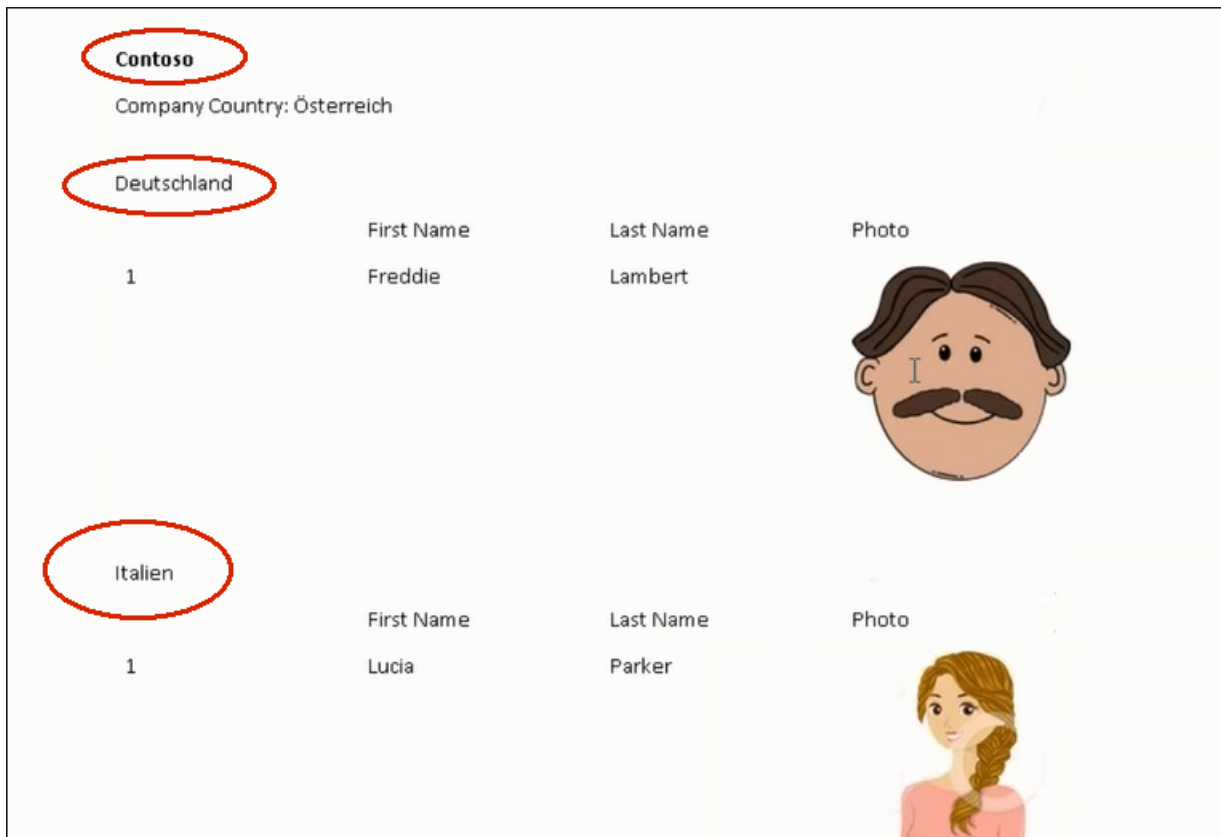
- e. Click  to execute the mail merge. The **Select Record** dialog displays. See the screenshot below.



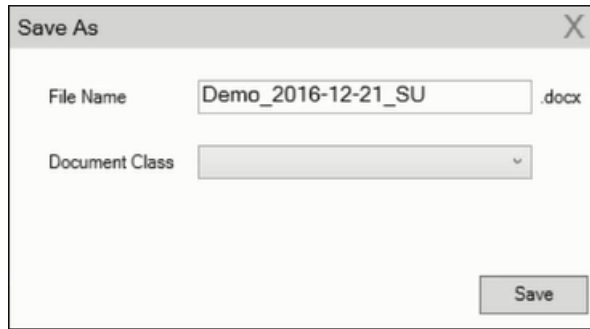
f. Click Start Mail Merge to generate the result document.

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,

`<documentName_<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


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  (Administration) > **Exchange Rate** to define exchange rates.

 **Exchange Rate YEN**

Menu | Edit  | Save  | Cancel  | Print  | Dropdown 


Currency YEN

Base Currency 1 Euro	Base Currency 2
Conv. Factor 1 117,2300000	Conv. Factor 2
Date	
Text 1 Euro = 117,23 YEN	

Currencies are converted using **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
		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. 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. However, if you wish to work with several base currencies, contact your Aurea representative.



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.

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" (**2nd Currency**). These fields are not visible by default in Aurea CRM web.

Note: For currencies to be converted, appropriate exchange rates between the currencies need to be defined.

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, see [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, see [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.

Exchange Rate

Select  (Administration) > Exchange Rate to define exchange rates.

 **Exchange Rate YEN**

Menu | Edit Save Cancel |  v

Currency YEN

Base Currency 1 Euro Base Currency 2

Conv. Factor 1 117,2300000 Conv. Factor 2


Date

Text 1 Euro = 117,23 YEN

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
		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. 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: 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.



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: Note: For currencies to be converted, appropriate exchange rates between the currencies need to be defined, >> on page 171.

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: Note: The name of the second currency field is the same as the field containing the original currency with the suffix "2C" (**2nd Currency**). These fields are not visible by default in Aurea CRM web.

Note: For currencies to be converted, appropriate exchange rates between the currencies need to be defined, >> on page 171.

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: Note: Changes to the exchange rate in the **Exchange Rate** info area are not automatically applied to existing records.

7

Rep Information

Rep Information

Learn to store users in Aurea CRM and add additional information about them.

Users in Aurea CRM are stored in the **Rep** info area ( **(Administration) > Reps**). You can enter additional information concerning the rep in the **Rep Additional Info** info area.

Assign the rep to a business area (e.g. "OTC") in the **Business Area** field in the **Rep Additional Info** info area. If you define product details for the "OTC" business area, these records only apply to reps assigned to the "OTC" business area. The same applies to the entry of sample codes, weightings and conditions.

Reps can only view those entries assigned to their business area.

8


Items

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:

- Search for and add **items**.
- Automatically transfer **item details** to other info areas (e.g. offer items, installed base items etc.).
- Group items by product **group**, **sector**, **brand** and **grade**.
- Define various price lists in various currencies that are used to automatically price items when adding offers, orders and refunds.
- Enter sample codes for each business area to determine the introduction period for an item and the amount of samples that may be distributed during this phase.
- Define complex conditions with staggered discounts (at the offer/order and item levels), fixed prices and discounts in kind for companies, customer groups, items and item groups.
- Define hierarchical item structures.

Note: You can also search for items in Aurea CRM win using the item search ()^s), see Aurea win Business Logic BTB manual.

Item Master

Item Master IND 40mg

Menu | Edit | Save | Cancel | [Document Icon]

Item No. 11001 Item name IND 40mg Photo

Sector Own Product Prod.Cat. Cardio-vascular

Brand Indramal Grade Tablet

PCN Producer No.

Text | **Details** | Documents

Only available at phar... Medicament

Prescription Adv. Med. Code

Packaging Unit 2 Pack. Unit Name

Saleable From Saleable To

Deliv.Depot Sort Order

Related Data

Price lists × Sample Code ×

Item ...	Curre...	Country	Customer G...	Indiv. Price...	Valid from	End
11001	Euro			AkiCompPL	21.08.2012	
11001	Euro	Austria			21.08.2012	

The **Item Master** info area stores basic information about individual items. For more information on the individual fields, refer to the online field help.


Item data plays an important role in other info areas:

- For example, you can define discounts for sectors or product groups, which then apply to all items belonging to that sector or product group.
- You can define any number of price lists for each item.

The following info areas access the item master:

- **Special Offer Item**
- **Offer Item**
- **Order Item**
- **Stock**
- **Stock Control Item**
- **Installed Base Item**
- **Conditions**
- **Competition Item**

- **Listing**
- **POS Monitoring Item**
- **Product Discussion Definition Item**
- **Refunding Item**
- **Slotting Fees**
- **Promotional Material**




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** etc.).

Note: 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 calculations carried out for records containing the old item number is no longer be correct.

Adding Items

To add a new item:

1. The following options are available:

- Select  (**Products & Service**) > **New Item**.
- Select  (**Products & Service**) > **Item Master**, start the search and click on  (**New**).

2. Enter data such as the **Item No.**, **Item name**, **Sector**, **Product Group** etc.

3. Enter additional data on the various tabs. For example, you can define the time period over which the item may be sold using the **Saleable From** and **Saleable To** fields.

4. Save the record.

Price Lists

Any number of price lists can be defined per item in the **Price List** info area. The prices of items in offers, orders and refunds are automatically calculated based on the price lists.

Pricelist Euro

Menu | Edit | Save | Cancel | ▼

Item name IND 40mg	Item No. 11001
Valid from 21.08.2012	Valid to 29.03.2014
Currency Euro	Country
Customer Group	Indiv. Price List AkiCompPL

Prices | Text

End Price 777,00	Factory Price 1
Price (retail)	Factory Price 2

Parent Data

Item Master [IND 40mg](#)

There are three types of price lists:

- Individual price lists (**Indiv. Price List** field): A price list that can be selected explicitly in an offer/order.
- Customer group price lists (**Customer Group** field): A price list for a group of companies.
- Country-specific price lists (**Country** field): Price list for a country.

In each price list, only one of these three fields may contain data. When pricing items, individual price lists take precedence. If no suitable individual price list is available, a customer group price list is used, and finally the price list for a country is used if no other list is found.

Note: Note: Price lists are only valid for offers, orders and refunds added in the same currency as the price list. Currencies cannot be converted. When viewing an item, price lists defined for an item are listed under **Related Data**.

Time Limitations for Price Lists

Define the time period the price list is valid for in the **Valid from** and **Valid to** fields. For example, you can add new price lists for an item for various countries each year, without needing to delete the old price lists. These time periods may not overlap one another for the same item, country and currency (i.e. only one price list can be valid for at any time).

If you add a new price list, whose time period overlaps the time period entered for an existing price list, a message is displayed including existing price list's time period. You can change the time period as necessary.

Defining the Structure of a Price List

Aurea recommends creating a price list in the local currency for every country and item. This price list is then used for offers and orders if no individual or customer group price lists apply.

Individual and customer group price lists only need to be added if prices for individual companies or company groups differ from the standard prices (i.e. the country prices).

Customer group price lists are recommended if you want to define a price list for a group of customers, especially if you want define conditions (discounts) for this group, >> on page 233.

Individual price lists can used to define specific price lists for companies that are part of a customer group, but to which prices that differ from the group’s prices apply.

Individual price lists must be entered in offers or orders, i.e. you can choose whether an individual price list should be used when adding an offer or order.

Weightings

Use the **Weighting** info area (not available by default in Aurea CRM web) to define weightings for a specific time period that apply to an item and business area: The time periods defined for the weightings per business area may not overlap.

Enter weightings for an item in the **Item Master** info area.

The following prerequisites must be met to use weightings when adding offers and orders:

- The weighting must apply to the same business area as the offer or order. The business area is transferred from the data stored in the **Rep Additional Info** info area for the rep who added the offer or order.
- A weighting record must exist for the item entered in the offer or order items.
- The weighting must be valid at the time of the offer or order (**Date** in the offer/order is between the dates entered in the **Valid from** and **Valid to** fields in the weighting).

If no suitable weighting has been entered, the **Weighting** is set to 0 (zero).

The weighted total **quantity** of an offer/order items and the total weighted **quantity** of the offer/order are calculated automatically is based on the weightings; these values are used to apply discounts at the offer/order level.

The corresponding fields in the offer or order items are calculated as follows:

Field	Calculation
Weighting	Factor (from the Weighting info area)
Wtd. Qty	Quantity * Weighting
Wtd. Qty. Ordered	Inventory quantity * Weighting

The **Wtd. Qty Ordered** and **Inventory quantity** fields are only present in the **Order Item** info area.

The values in the **Wtd. Qty.** fields in the item records are totaled in the **Weighted total quantity** field in the order record.

Time Periods

You can enter time periods in the **Item Master** info area for each item and business area, which determine when an item can be sold, ordered or returned:

- If you have a **continuous time period** during which orders, sales and returns can take place, you can enter the time period **directly in the item master record** (**Saleable from/to, In Stock From/To, Repurchase From/To** fields).
- **Time periods that are not continuous** can be defined for orders, sales and returns in the **Period** info area (not available by default in Aurea CRM web). Enter the **Business Area, Type** (Can be sold, Can be Ordered, Return) and the valid time period (**Valid from/to** fields).

Note: Note: Your administrator can use these time periods to define conditions that apply to access rights. For example, your administrator can determine that items are only displayed if the current date is within one of the time periods entered in the **Item Master** or **Period** info areas, see *CRM.core Administrator Guide*.

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.

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.

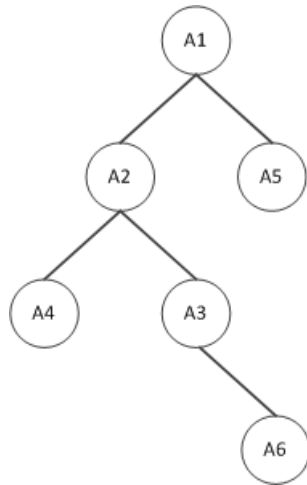
To add an item structure:

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.

Item Structure	
IS_StaNo	1
IS_SerNo	70
AR_StaNo	1
AR_SerNo	51
AR_1_StaNo	1
AR_1_SerNo	48
Structure type	Structure 1
IS_1_StaNo	1
IS_1_SerNo	65
IS_2_StaNo	1
IS_2_SerNo	66
IS_3_StaNo	1
IS_3_SerNo	68
IS_4_StaNo	1
IS_4_SerNo	70
Item Master	Item 6
Target item	Item 3
Created on	02/06/2014
Added on St	1
Created at	08:18:16.478

Item Master: [Item 6](#)
 Structure type: Structure 1
 Bundle code:
 Target item: [Item 3](#)

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), see [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 Master

Item Master IND 40mg

Menu | Edit | Save | Cancel | Print

Item No. 11001	Item name IND 40mg	Photo
Sector Own Product	Prod.Cat. Cardio-vascular	
Brand Indramal	Grade Tablet	
PCN	Producer No.	

Text | Details | Documents

Only available at phar...	Medicament <input checked="" type="checkbox"/>
Prescription <input type="checkbox"/>	Adv. Med. Code
Packaging Unit 2	Pack. Unit Name
Saleable From	Saleable To
Deliv.Depot	Sort Order

Related Data

Price lists x | Sample Code x

	Item ...	Curre...	Country	Customer G...	Indiv. Price...	Valid from	End
✎	11001	Euro			AkiCompPL	21.08.2012	
	11001	Euro	Austria			21.08.2012	

The **Item Master** info area stores basic information about individual items. For more information on the individual fields, refer to the online field help.


Item data plays an important role in other info areas:

- For example, you can define discounts for sectors or product groups, which then apply to all items belonging to that sector or product group.
- You can define any number of price lists for each item, >> on page 177.

The following info areas access the item master:

- **Special Offer Item**
- **Offer Item**
- **Order Item**
- **Stock**

- **Stock Control Item**
- **Installed Base Item**
- **Conditions**
- **Competition Item**
- **Listing**
- **POS Monitoring Item**
- **Product Discussion Definition Item**
- **Refunding Item**
- **Slotting Fees**
- **Promotional Material**




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** etc.).

Note: 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 calculations carried out for records containing the old item number will no longer be correct.

Adding Items

To add a new item:

1. The following options are available:

- Select  (**Products & Service**) > **New Item**.
- Select  (**Products & Service**) > **Item Master**, start the search and click on  (**New**).

2. Enter data such as the **Item No.**, **Item name**, **Sector**, **Product Group** etc.

3. Enter additional data on the various tabs. For example, you can define the time period over which the item may be sold using the **Saleable From** and **Saleable To** fields.

4. Save the record.

Price Lists

Any number of price lists can be defined per item in the **Price List** info area. The prices of items in offers, orders and refunds are automatically calculated based on the price lists.

Pricelist Euro

Menu | Edit | Save | Cancel | Print

Item name IND 40mg	Item No. 11001
Valid from 21.08.2012	Valid to 29.03.2014
Currency Euro	Country
Customer Group	Indiv. Price List AkiCompPL

Prices | Text

End Price 777,00	Factory Price 1
Price (retail)	Factory Price 2

Parent Data

Item Master | IND 40mg

There are three types of price lists:

- Individual price lists (**Indiv. Price List** field): A price list that can be selected explicitly in an offer/order.
- Customer group price lists (**Customer Group** field): A price list for a group of companies.
- Country-specific price lists (**Country** field): Price list for a country.

In each price list, only one of these three fields may contain data. When pricing items, individual price lists take precedence. If no suitable individual price list is available, a customer group price list is used, and finally the price list for a country is used if no other list is found, >> on page 199.

Note: Note: Price lists are only valid for offers, orders and refunds added in the same currency as the price list. Currencies cannot be converted. When viewing an item, price lists defined for an item are listed under **Related Data**.

Time Limitations for Price Lists

Define the time period the price list is valid for in the **Valid from** and **Valid to** fields. For example, you can add new price lists for an item for various countries each year, without needing to delete the old price lists. These time periods may not overlap one another for the same item, country and currency (i.e. only one price list can be valid for at any time).

If you add a new price list, whose time period overlaps the time period entered for an existing price list, a message is displayed including existing price list's time period. You can change the time period as necessary.

Defining the Structure of a Price List

Aurea recommends creating a price list in the local currency for every country and item. This price list is then used for offers and orders if no individual or customer group price lists apply.

Individual and customer group price lists only need to be added if prices for individual companies or company groups differ from the standard prices (i.e. the country prices).

Customer group price lists are recommended if you want to define a price list for a group of customers, especially if you want define conditions (discounts) for this group, >> on page 233.

Individual price lists can used to define specific price lists for companies that are part of a customer group, but to which prices that differ from the group's prices apply.

Individual price lists must be entered in offers or orders, i.e. you can choose whether an individual price list should be used when adding an offer or order.

Weightings

Use the **Weighting** info area (not available by default in Aurea CRM web) to define weightings for a specific time period that apply to an item and business area: The time periods defined for the weightings per business area may not overlap.

Enter weightings for an item in the **Item Master** info area.

The following prerequisites must be met to use weightings when adding offers and orders:

- The weighting must apply to the same business area as the offer or order. The business area is transferred from the data stored in the **Rep Additional Info** info area for the rep who added the offer or order.
- A weighting record must exist for the item entered in the offer or order items.
- The weighting must be valid at the time of the offer or order (**Date** in the offer/order is between the dates entered in the **Valid from** and **Valid to** fields in the weighting).

If no suitable weighting has been entered, the **Weighting** is set to 0 (zero).

The weighted total **quantity** of an offer/order items and the total weighted **quantity** of the offer/order are calculated automatically is based on the weightings; these values are used to apply discounts at the offer/order level, >> on page 235.

The corresponding fields in the offer or order items are calculated as follows:

Field	Calculation
Weighting	Factor (from the Weighting info area)
Wtd. Qty	Quantity * Weighting
Wtd. Qty. Ordered	Inventory quantity * Weighting

The **Wtd. Qty Ordered** and **Inventory quantity** fields are only present in the **Order Item** info area.

The values in the **Wtd. Qty.** fields in the item records are totaled in the **Weighted total quantity** field in the order record.

Time Periods

You can enter time periods in the **Item Master** info area for each item and business area, which determine when an item can be sold, ordered or returned:

- If you have a **continuous time period** during which orders, sales and returns can take place, you can enter the time period **directly in the item master record** (**Saleable from/to**, **In Stock From/To**, **Repurchase From/To** fields).
- **Time periods that are not continuous** can be defined for orders, sales and returns in the **Period** info area (not available by default in Aurea CRM web). Enter the **Business Area**, **Type** (Can be sold, Can be Ordered, Return) and the valid time period (**Valid from/to** fields).

Note: Note: Your administrator can use these time periods to define conditions that apply to access rights. For example, your administrator can determine that items are only displayed if the current date is within one of the time periods entered in the **Item Master** or **Period** info areas, >> CRM.core Administrator Guide.

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, >> on page 183.

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:

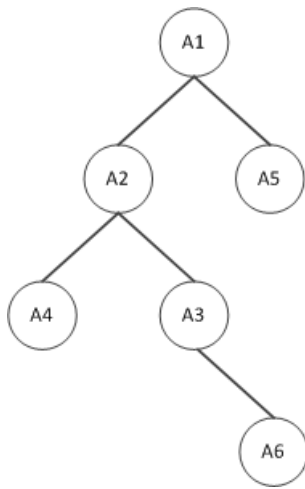
1. Switch to the desired item in the **Item Master** info area.
2. Switch to the **Item Structure** tab and click on **⊕ (New)**.
3. Select the parent item.
4. Select the **Structure type**.
5. Save.

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.

Item Structure	
IS_StaNo	1
IS_SerNo	70
AR_StaNo	1
AR_SerNo	51
AR_1_StaNo	1
AR_1_SerNo	48
Structure type	Structure 1
IS_1_StaNo	1
IS_1_SerNo	65
IS_2_StaNo	1
IS_2_SerNo	66
IS_3_StaNo	1
IS_3_SerNo	68
IS_4_StaNo	1
IS_4_SerNo	70
Item Master	Item 6
Target item	Item 3
Created on	02/06/2014
Added on St	1
Created at	08:18:16.478

Item Master [Item 6](#)

Structure type

Bundle code

Target item [Item 3](#)

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: Note: The **IS_X_StaNo/SerNo** fields are not communicated and are recalculated when importing the communication file. When importing an item structure, the **Item No.** and **Parent Item No.** are used to create the hierarchy automatically.

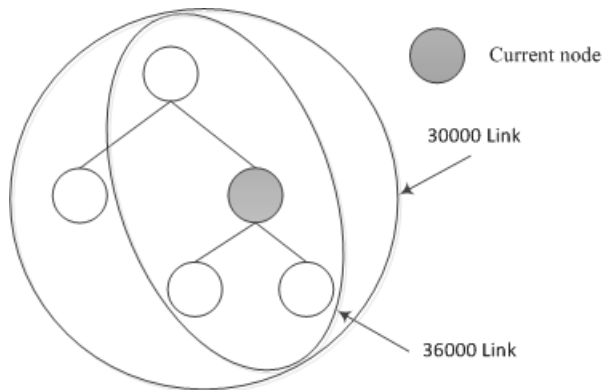
Item Structure Links

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.

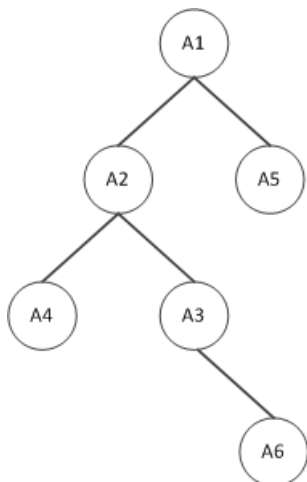
- **30000**: Returns the entire item structure
- **32000**: Returns all parent items
- **34000**: Returns all child items
- **36000**: Returns all parent and child items both higher up and lower down in the hierarchy

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.

Query Item Structure*

✓ Save ✗ Delete + 👤 Send to Reps... ➡➡ Run Query in Background ➡➡ Run Query

Query name Item Structure

Include Affiliations ?

› UQL Syntax
▼ Formatted

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

Item Master
Output Fields: Item No.

AND

- Item name** = "I*"
- Business Area** = "Sports"

WITH **Item Structure** (34000. AR_StaNo,AR_SerNo -> AR-StaNo,AR-SerNo)
Output Fields: Item Master

Structure type = "Structure 1"

Max. 100 rows ➡➡ Run Query

Query Result

📄 Export (MS Excel) ✓ Save as Query Snapshot 👤 Quick Campaign

Item No.	Item Master
A2	Item 2
A2	Item 3
A2	Item 4
A2	Item 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'".

The screenshot shows two windows from the Aurea CRM interface. The top window is titled "Variable" and contains the following fields:

- Name: CORE::INDIRECT-IS-LINK-TREE-1
- Description: (empty)
- Info Area: Item Structure
- Field Name: Structure type
- Type: Condition
- Lock: (checkbox, unchecked)

The bottom window is titled "Variable Value" and shows a table with the following fields:

Z6-TenNo		
Stat. No.		
Rep Group ID		
Rep ID		
Language No.		
Login role		
Country		
Condition for info area		
Default		
Var. Text	F6='#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.

-
- 0. AR-StaNo,AR-SerNo -> AR-StaNo,AR-SerNo
 - 30000. AR-StaNo,AR-SerNo -> (TREE)->AR-StaNo,AR-SerNo
 - 32000. AR-StaNo,AR-SerNo -> (TREE-Parents)->AR-StaNo,AR-SerNo
 - 34000. AR-StaNo,AR-SerNo -> (TREE-Children)->AR-StaNo,AR-SerNo
 - 36000. AR-StaNo,AR-SerNo -> (TREE-Parents+Children)->AR-StaNo,AR-SerNo
 - 40000. AR-StaNo,AR-SerNo -> (Struktur 1)(TREE)->AR-StaNo,AR-SerNo
 - 42000. AR-StaNo,AR-SerNo -> (Struktur 1)(TREE-Parents)->AR-StaNo,AR-SerNo
 - 44000. AR-StaNo,AR-SerNo -> (Struktur 1)(TREE-Children)->AR-StaNo,AR-SerNo
 - 46000. AR-StaNo,AR-SerNo -> (Struktur 1)(TREE-Parents+Children)->AR-StaNo,AR-SerNo

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, >> on page 104. All items continue to be listed in the quick add area until an item is selected from the tree.

Deselect

Bicycle

- ▶ Street Bike
- ▼ Mountain Bike
 - Brakes XS
 - Frame (MB)
 - ▼ Gearshift (MB)
 - Gearshift LX
 - Gearshift XT
 - Gearshift XTR
 - Wheel (MB)
- ▶ Racing Bike

All
Overview
Last Entries

Item Product Group

+ Add more ... ▼

Max. records per page

	Item No.	Item name	
	b200-1	Mountain Bike	
	b201-1	Brakes XS	
	b202-1	Frame (MB)	
	b203-1	Gearshift (MB)	
	b204-1	Wheel (MB)	
	b203-11	Gearshift LX	
	b203-12	Gearshift XT	
	b203-13	Gearshift XTR	
	b204-11	Tube	
	b204-12	Wheel Rim	
	b204-13	Valve	

Related Data

Offer Items
×

Item name	Wheel Rim	Item No.	b204-12
Product Gro...	Cycling	Product	
Description			

- 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: 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: 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.

9

Opportunities

Opportunities

You can add opportunities in Aurea CRM once you come to know of a possible sales opportunity.

Throughout the sales process, you can collect more and more information relating to the opportunity. Enter this information in Aurea CRM so that 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.
- Add **opportunity products** including details (estimated price etc.).
- Enter the persons involved in an opportunity as **participants** with specific roles (decision maker, partner etc.) including details on the participants' attitude and influence.
- Add an **installed base** for an opportunity participant.
- Add **Opportunity Competitors**.
- Add relevant documents.
- Document all **activities** that take place within the scope of the opportunity.
- Once you have begun negotiations, you can create an initial **offer** and automatically transfer information from the opportunity to the offer.
- **Opportunities** can be **rated** (ABC classification), allowing you to concentrate on those opportunities with the highest expected impact/revenue.
- **Analyze** opportunities, for example to create revenue forecasts or to optimize your sales processes.

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.

\$ Opportunity Starter Kit

Menu | Edit | Save | Cancel | 



Opportunity Starter Kit

Type Level Level 0

Resp. Rep ID Resp. Rep ID (Mar...

Rep ID Project Manager ID

Details | **Value** | Text



Realization Probab...  100,00% Investment proba...  100,00%



Budg.curr.Year Budg.n.Year


Total product value 15,00 Currency Euro

Wtd. total product ... 15,00 Wtd. total product ... 15,00

Parent Data | Related Data

 Opportunity Participant x Opportunity Product x Opportunity Competitor x Activities 

 New  Display All Records

 **Participation** | **Infl...** | **-> Company** | **Person**

Contact Person BemComp

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.

- The opportunity's investment and realization probability.
- The estimated **Completion Date**.

3. Save the record.

4. Add the following additional information regarding the opportunity:

- Opportunity participants
- Opportunity products and offers

- Opportunity competitors
- Activities
- Document links
- Installed base
- Opportunity rating

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 created for opportunity participants.

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.

3. Enter the data.
4. Save the record.

Adding Installed Bases for Opportunity Participants

The **Installed Base** info area allows you to store the products currently used by a customer.

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 overwritten.

- **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 order with **your** company (and not with a competitor).

A further weighted value is calculated automatically.

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 Product** tab and click on **+** (**New**).

The screenshot shows a software interface for adding opportunity products. The title is 'Opportunity Products Indramal'. Below the title is a menu bar with 'Menu', 'Edit', 'Save', 'Cancel', and a document icon. The main form area contains the following fields and values:

- Prod.Cat. Small
- Brand Indramal
- Product value 18,56
- Currency CHF
- A 'Details' tab is selected, showing:
 - Wtd. product value 18,56
 - Wtd. product value... 18,56
 - Realization Probab... 100,00%
 - Investment proba... 100,00%

3. Enter the following details:
 - **Prod.Cat.** and **Brand**
 - **Product value** (the absolute product value)
 - **Wtd. product value** (the product value weighted by the probability)

Note: Note: If you change the **Product value**, the **Wtd. product value** is not updated automatically. Enter 0 (zero) in the **Wtd. product value** field to recalculate the value.

4. Save the record.

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: 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. Opportunity products are only added or updated automatically if the **Status** of the offer is "Offered". **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 the opportunity and add any follow-up offers. If the negotiations are successful, you can copy the offer to 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 participant is a person, they are entered in the **Contact Person** field.

Offer

Menu | Edit | Save | Cancel | [Icon]

Offer No. Date 16.05.2014
 Status Rep ID [Chris Aki](#)
 Offer value 60,00 Wtd. Offer Value 60,00
 Currency Euro Indiv. Price List
 Stock Receipt Type
 Quantity factor + Pack.Unit

General Value

Payment Conditions Delivery Conditions
 Dispatch Condition Delivery Date
 Business Area OTC Realization Date
 Realization Probabilit... 100,00% Investment probabili... 100,00%
 Contact Person Mr. Bem You Special Offer
 Ticket Opportunity [Starter Kit](#)
 Text

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.

Note: Set the **Status** to **Offered** to transfer the values entered in the offer items to the opportunity products.

5. Save the record.
6. Select **New > New Offer Item** from the opportunity participant's context menu to add items to the offer.

The **Offer value** field 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 **Optional item** check box is 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:** Item value weighted according to the probability of the offer
- **Wtd. product value (Opportunity):** Item value weighted according to the probabilities entered in the opportunity

Note: Note: If you add an item to an opportunity offer that corresponds to an opportunity product (the values in the **Product Group** and **Brand** field are the same, the **Sector** and **Grade** fields are empty), the **Product value**, **Wtd. product value** and **Wtd. product value (Opportunity)** are overwritten with the values in the offer. Opportunity products are only added or updated automatically if the **Status** of the offer is "Offered".

If the currency entered in the offer differs from that in the opportunity, the values are converted automatically using the exchange rate table, >> on page 171.

For further information on offers and orders, >> on page 193.

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: 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.

Rating Opportunities

You can evaluate opportunities in Aurea CRM web. To do so, your administrator needs to define a portfolio. 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  **(Sales) > Sales Funnel**.

Sales Funnel

Category "Level" Show Legend

Category
 Category Level ▼

Currency
 Currency Euro ▼

Filter

Company _____

Country all ▼

Rep ID _____ 👤

Completion Date from 04.06.2012 ▼

Completion Date to 15.09.2013 ▼

➔ Run

Level 0
 Level 1
 Level 2
 Level 3
 Level 7
 Level 8
 Level 9

2. You can change which data is displayed, for example by choosing a different category or defining a filter and clicking on **Start**.

Note: Note: Only opportunities where a completion date has been entered are included in the sales funnel.

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: Note: Your administrator can configure the appearance of the buying center wall (e.g. column sort order, font color), see [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 screenshot displays the buying center wall for an opportunity. The header includes the opportunity name, level, and value. The main area is divided into columns based on participant attitude. A participant is currently in the 'no value' column, and a context menu is open over them, showing options to add new participants or refresh suggestions.

- 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: 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: 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.

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.

\$ Opportunity Starter Kit

Menu | Edit | Save | Cancel |  ▼

Opportunity Starter Kit

Type Level Level 0

Resp. Rep ID Resp. Rep ID (Mar...

Rep ID Project Manager ID

Details Value Text

Realization Probab... 100,00% Investment proba... 100,00%

Budg.curr.Year Budg.n.Year


Total product value 15,00 Currency Euro

Wtd. total product ... 15,00 Wtd. total product ... 15,00

Parent Data | Related Data

Opportunity Participant × Opportunity Product × Opportunity Competitor × Activities

New ↪ Display All Records

 Participation Infl... -> Company Person

Contact Person BemComp

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, >> on page 187.

- The opportunity's investment and realization probability, >> on page 187.
- The estimated **Completion Date**, >> on page 190.

3. Save the record.

4. Add the following additional information regarding the opportunity:

- Opportunity participants >> on page 186
- Opportunity products and offers, >> on page 187 and on page 188
- Opportunity competitors, >> on page 189
- Activities, >> on page 187
- Document links, >> on page 167
- Installed base, >> on page 187
- Opportunity rating, >> on page 190

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 created for opportunity participants, >> on page 188 and on page 69.

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, >> on page 144.

3. Enter the data.
4. Save the record.

Adding Installed Bases for Opportunity Participants

The **Installed Base** info area allows you to store the products currently used by a customer, >> on page 292.

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 overwritten.

- **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 order with **your** company (and not with a competitor).

A further weighted value is calculated automatically:

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 Product** tab and click on **+** (**New**).

Opportunity Products Indramal

Menu | Edit | Save | Cancel | [Icon]

Prod.Cat. Small Brand Indramal

Product value 18,56 Currency CHF

Details

Wtd. product value 18,56 Wtd. product value... 18,56

Realization Probab... 100,00% Investment proba... 100,00%

3. Enter the following details:

- **Prod.Cat.** and **Brand**
- **Product value** (the absolute product value)
- **Wtd. product value** (the product value weighted by the probability)

Note: Note: If you change the **Product value**, the **Wtd. product value** is not updated automatically. Enter 0 (zero) in the **Wtd. product value** field to recalculate the value.

4. Save the record.

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: 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. Opportunity products are only added or updated automatically if the **Status** of the offer is "Offered".
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 the opportunity and add any follow-up offers. If the negotiations are successful, you can copy the offer to an order, >> on page 195.

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 participant is a person, they are entered in the **Contact Person** field.

Offer

Menu | Edit | Save | Cancel | [Icon]

Offer No. Date 16.05.2014
 Status Rep ID Chris Aki
 Offer value 60,00 Wtd. Offer Value 60,00
 Currency Euro Indiv. Price List
 Stock Receipt Type
 Quantity factor + Pack.Unit

General Value

Payment Conditions Delivery Conditions
 Dispatch Condition Delivery Date
 Business Area OTC Realization Date
 Realization Probabilit... 100,00% Investment probabili... 100,00%
 Contact Person Mr. Bem You Special Offer
 Ticket Opportunity Starter Kit
 Text

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.

Note: Note: Set the **Status** to **Offered** to transfer the values entered in the offer items to the opportunity products.

5. Save the record.
6. Select **New > New Offer Item** from the opportunity participant's context menu to add items to the offer, >> on page 194.

The **Offer value** field 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 **Optional item** check box is 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:** Item value weighted according to the probability of the offer
- **Wtd. product value (Opportunity):** Item value weighted according to the probabilities entered in the opportunity

Note: Note: If you add an item to an opportunity offer that corresponds to an opportunity product (the values in the **Product Group** and **Brand** field are the same, the **Sector** and **Grade** fields are empty), the **Product value**, **Wtd. product value** and **Wtd. product value (Opportunity)** are overwritten with the values in the offer. Opportunity products are only added or updated automatically if the **Status** of the offer is "Offered".

If the currency entered in the offer differs from that in the opportunity, the values are converted automatically using the exchange rate table, >> on page 171.

For further information on offers and orders, >> on page 193.

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: 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.

Rating Opportunities

You can evaluate opportunities in Aurea CRM web. To do so, your administrator needs to define a portfolio, >> on page 134. 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  **(Sales) > Sales Funnel**.


Sales Funnel

Category "Level"

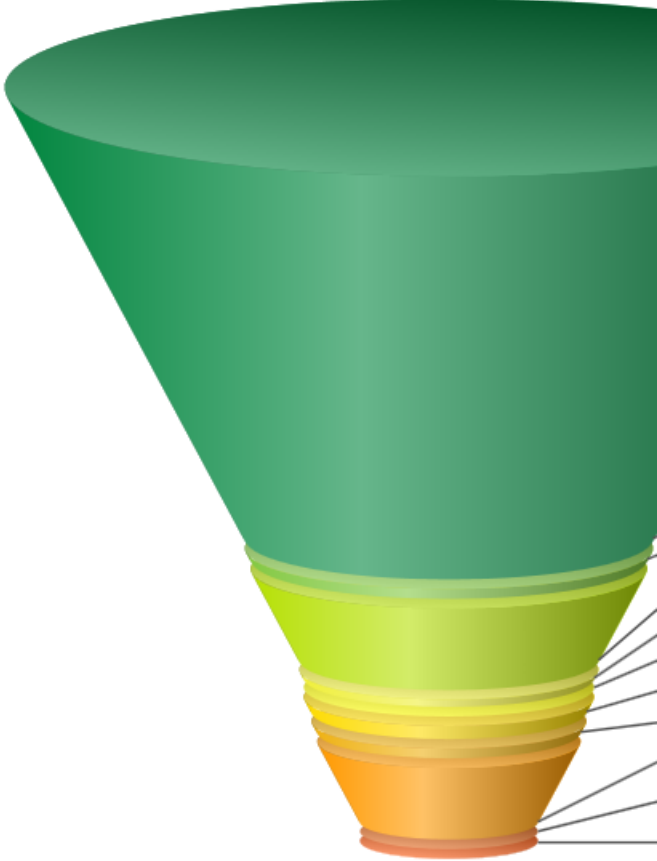
Show Legend

Category
Category Level ▼

Currency
Currency Euro ▼

Filter
Company _____
Country all ▼
Rep ID _____ 
Completion Date from 04.06.2012 ▼
Completion Date to 15.09.2013 ▼

>> Run



Level 0 Level 1 Level 2 Level 3
Level 7 Level 8 Level 9

2. You can change which data is displayed, for example by choosing a different category or defining a filter and clicking on **Start**.

Note: Note: Only opportunities where a completion date has been entered are included in the sales funnel.

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: 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.



\$ Opportunity IT department expansion		Level 4	Realizat
		420.000,00	Re
New Participant		no value	hostile
Suggested Participants			negative
<input type="checkbox"/> Mr. Andrea Gabrieli <input type="radio"/> Contact Person			


- 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: 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: 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.

10

Offers and Orders

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 "header record" that contains data relating to the entire offer (e.g. offer number, currency etc.), and item records that contain data concerning the individual items in the offer.

If a customer places an **order**, you can copy the offer's data to an order.

Aurea CRM web allows you to:

- Add offers from a company or opportunity participants.
- Copy data from offers to orders, or add orders directly.
- Access the item master when adding items to offers and orders.
- Add offer items using the quick add function.
- Manage the companies and persons involved.
- Automatically calculate the value of offers/orders based on the items entered.
- Automatic pricing based on price lists and conditions.
- Enter special offers with special conditions for various quantities.
- Use listings in conjunction with the quick add function.
- Enter information on how items in offers affect stocks and automatically update stocks when adding orders.
- Choose the delivery address (Aurea CRM win only).

The following additional function is available when adding orders:

- Analyze orders per item and rep.
- Enter the delivery date for orders.

Note: You can import order statistics in Aurea CRM win (**Order Statistics** info area) and use this data when adding orders.

Offers

Learn how to add offers and offer items.

Any number of offers may be added for a company or opportunity participant.

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 (and order's) items.
- **Prices** are calculated for the individual **offer items** (and **order items**). If **price lists** for the items have been defined in the same currency as the offer, these price lists are used to price the items.

Conditions, bulk discounts and special prices must be defined before adding an order.

Adding Offers

To add an offer:

1. Switch to the desired company or opportunity participant and select **New > New Offer** from the context menu.

Note: If you add an offer from an opportunity participant, the **Opportunity** field in the offer is entered automatically and the offer is linked to the opportunity.

Offer

Menu | Edit | Save | Cancel | Print

Offer No.	Date 16.05.2014
Status	Rep ID Chris Aki
Offer value 60,00	Wtd. Offer Value 60,00
Currency Euro	Indiv. Price List
Stock	Receipt Type
Quantity factor + Pack.Unit	

General | Value

Payment Conditions	Delivery Conditions
Dispatch Condition	Delivery Date
Business Area OTC	Realization Date
Realization Probabilit... 100,00%	Investment probabili... 100,00%
Contact Person Mr. Bem You	Special Offer
Ticket	Opportunity Starter Kit
Text	

Note: If **Payment Conditions** and **Delivery Conditions** have been entered for the company, these are transferred to the offer (and the offer items).

- Enter data that affect the value of the offer, such as the **Currency**, **Offer No.**, **Status**, **Receipt Type**, **Realization Probability (%)** and any discount.

Note: **Note:** 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.

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).

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.

You can either add items to offers individually or use the quick add function (select **Quick Add (Items)** from the offer's context menu). If a special offer has been entered in the offer, only the **Overview** and **Special Offer** filters are available in the Quick Add area. Select **Special Offer** to display the special offer items defined for the special offer.

To add an offer item:

1. Switch to the desired offer.
2. Select **New > New Offer Item** from the context menu.

3. Click on **Q (Select)** next to the **Item No.** field to select an item. The **Item No.**, **Item name**, **Sector**, **Product Group**, **Brand**, **Grade** and **Packaging Unit** are entered automatically.

The **Currency** is transferred from the offer and cannot be edited. Individual currency values in fields can be displayed in a second currency. For this to occur an exchange rate needs to be entered.

4. Enter data such as the **Quantity** and any discount. The **Value** is automatically calculated by multiplying the **Quantity**, **End Price**, value factor and **Price Factor**. If a **Packaging Unit** and **Quantity factor** of "+- Qty" (in the order) have been entered, the value factor is 1 / packaging unit; otherwise the value factor is 1. The **Price Factor** is transferred from the item master and is set to 1 by default. If suitable price lists exist, the **End Price** and **Value** are calculated automatically. You can manually change the **End Price**.
5. Save the record. The **Offer Item No.** is entered automatically.

The value **Discount abs.** (absolute discount) is calculated as **End Price * Discount / 100** (i.e. the discount is a percentage).

The item value after the discount is applied is entered in the **Disc.Value1** field (**Value - Discount abs.**).

Data such as the **Rev.cr.M** (the revenue for the current month) and the **Qty. Curr. Q** (the quantity in the current quarter) are displayed on the **Revenue & Quantity** tab.

The total offer value is calculated automatically: **Offer value = Total Items Value * (1 - Discount Cond. (Fixed)/100) * (1 - Cash Cond. (Special Offer)/100)**

Adding Offers

To add an offer:

1. Switch to the desired company or opportunity participant and select **New > New Offer** from the context menu.

Note: Note: If you add an offer from an opportunity participant, the **Opportunity** field in the offer is entered automatically and the offer is linked to the opportunity, >> on page 188.

The screenshot shows the 'Offer' form interface. At the top, there is a title bar with a percentage icon and the word 'Offer'. Below the title bar is a menu bar with icons for 'Menu', 'Edit', 'Save', 'Cancel', and a dropdown arrow. The main content area is divided into several sections:

- Offer No.** and **Date** 16.05.2014
- Status** and **Rep ID** [Chris Aki](#)
- Offer value** 60,00 and **Wtd. Offer Value** 60,00
- Currency** Euro and **Indiv. Price List**
- Stock** and **Receipt Type**
- Quantity factor** + Pack.Unit
- General** tab is selected, showing **Value**
- Payment Conditions** and **Delivery Conditions**
- Dispatch Condition** and **Delivery Date**
- Business Area** OTC and **Realization Date**
- Realization Probabilit...** 100,00% and **Investment probabili...** 100,00%
- Contact Person** Mr. Bem You and **Special Offer**
- Ticket** and **Opportunity** [Starter Kit](#)
- Text**

Note: Note: If **Payment Conditions** and **Delivery Conditions** have been entered for the company, these are transferred to the offer (and the offer items).

2. Enter data that affect the value of the offer, such as the **Currency**, **Offer No.**, **Status**, **Receipt Type**, **Realization Probability (%)** and any discount.

Note: Note: 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.

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).

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, >> on page 199.

You can either add items to offers individually or use the quick add function (select **Quick Add (Items)** from the offer's context menu), >> on page 104. If a special offer has been entered in the offer, only the **Overview** and **Special Offer** filters are available in the Quick Add area. Select **Special Offer** to display the special offer items defined for the special offer.

To add an offer item:

1. Switch to the desired offer.
2. Select **New > New Offer Item** from the context menu.

Offer Item 1

Menu | Edit | Save | Cancel | [Icon]

Offer Item No. 1 Item No. 11001

Item name IND 40mg Prod.Cat. Cardio-vascular

Sector Own Product Grade Tablet

Brand Indramal Pack. Unit Name

Packaging Unit

Delivery Date

Value | Details | Revenue & Quantity

Quantity 2 Value 60,00

Factory Price Price (retail)

End Price 30,00 Currency Euro

Tax 1 VAT

Discount Discount % (Condi...

Discount abs. 6,60 Discount in k.

3. Click on **Q** (**Select**) next to the **Item No.** field to select an item. The **Item No.**, **Item name**, **Sector**, **Product Group**, **Brand**, **Grade** and **Packaging Unit** are entered automatically.

The **Currency** is transferred from the offer and cannot be edited. Individual currency values in fields can be displayed in a second currency. For this to occur an exchange rate needs to be entered, >> on page 172.

4. Enter data such as the **Quantity** and any discount. The **Value** is automatically calculated by multiplying the **Quantity**, **End Price**, value factor and **Price Factor**. If a **Packaging Unit** and **Quantity factor** of "+- Qty" (in the order) have been entered, the value factor is 1 / packaging unit; otherwise the value factor is 1. The **Price Factor** is transferred from the item master and is set to 1 by default. If suitable price lists exist, the **End Price** and **Value** are calculated automatically, >> on page 199 and on page 177. You can manually change the **End Price**.
5. Save the record.

The **Offer Item No.** is entered automatically.

The value **Discount abs.** (absolute discount) is calculated as **End Price * Discount / 100** (i.e. the discount is a percentage).

The item value after the discount is applied is entered in the **Disc.Value1** field (**Value - Discount abs.**).

Data such as the **Rev.cr.M** (the revenue for the current month) and the **Qty. Curr. Q** (the quantity in the current quarter) are displayed on the **Revenue & Quantity** tab.

The total offer value is calculated automatically: **Offer value = Total Items Value * (1 - Discount Cond. (Fixed)/100) * (1 - Cash Cond. (Special Offer)/100)**

Copying Offers to Orders

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.

To copy an offer's data to an order:

1. Switch to the desired offer.
2. Select **Copy to Order** from the context menu.

A new record is added and the relevant data (e.g. currency, items) is transferred to the new record.

Note: Note: Participants are not copied.

The **Status** of the offer is automatically set to "Order".

For more details on which fields are copied from offers to orders, refer to the online field help. Your administrator can configure which additional fields are copied from offers to orders in the **Configuration** info area, >> CRM.core Administrator Guide.

Note: Note: Offer items where the **Optional item** field is enabled are not copied to the order. 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 and consist of several order items. It is not added for persons.


When adding an order, you need to take the same aspects into account as with adding an offer. Calculating the order value, discounts etc. is the same as for offers.

Adding Orders

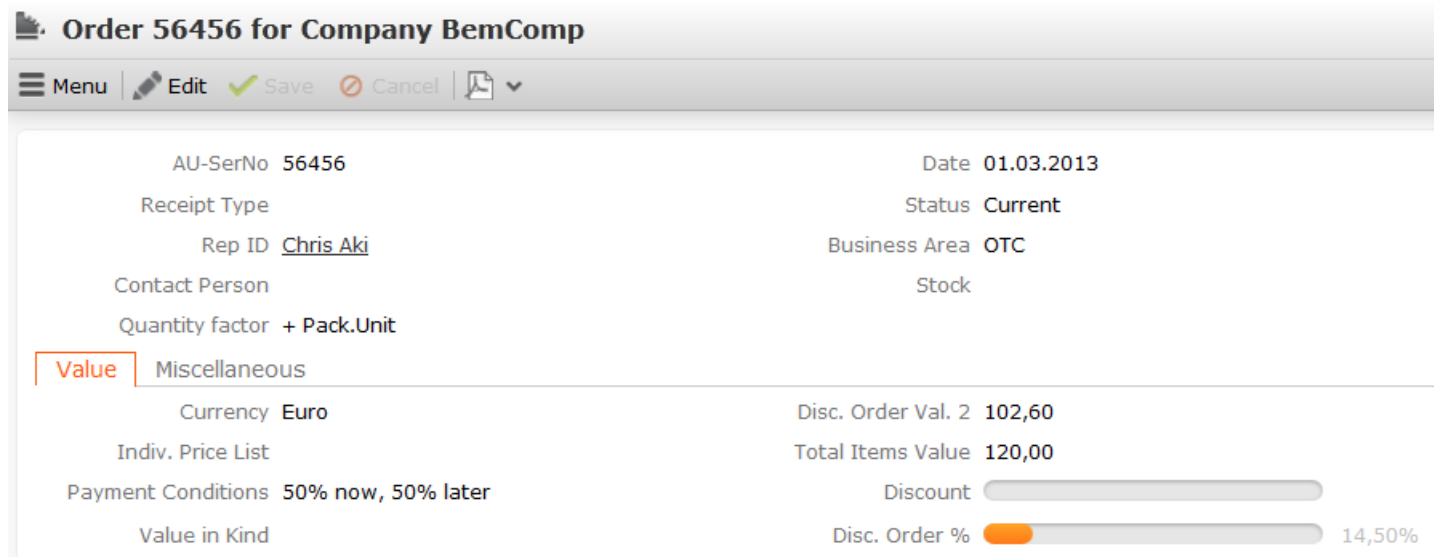
Orders are always added for companies.

To add an order:

1. The following options are available:

- Select  (**Sales**) > **New Order**. Select a company.
- Switch to the desired company. Switch to the **Orders** tab and click on **+** (**New**).

Note: If **Payment Conditions** and **Delivery Conditions** have been entered for the company, these are transferred to the order (and the order items).



Order 56456 for Company BemComp

Menu | Edit | Save | Cancel | [Icon] v

AU-SerNo 56456	Date 01.03.2013
Receipt Type	Status Current
Rep ID <u>Chris Aki</u>	Business Area OTC
Contact Person	Stock
Quantity factor + Pack.Unit	
Value Miscellaneous	
Currency Euro	Disc. Order Val. 2 102,60
Indiv. Price List	Total Items Value 120,00
Payment Conditions 50% now, 50% later	Discount <input type="text"/>
Value in Kind	Disc. Order % <input type="text"/> 14,50%

2. Enter data such as the **Currency**, **Quantity** and any discount.

Note: Once the order has been saved, you can **no longer** edit the **Currency** field. The **Receipt Type** determines how stocks are affected by the order.

3. Save the record. The **AU-SerNo** field (the serial number of the order record) is entered automatically.

Adding Items to Orders

Individual items are added to orders using order item records.

You can either add items to orders individually or use the quick add function (select **Quick Add (Order Items)** from the order's context menu). If a special offer has been entered in the order, only the **Overview** and **Special Offer** filters are available in the Quick Add area. Select **Special Offer** to display the special offer items defined for the special offer

Note: The **End Price** entered in the price list (if present) is only displayed in the quick add area once the item has been saved. If you select the **Listing** filter, you can select a relationship type in the field beneath the filters. The **Lot No.** column displays the lot numbers and current quantity. You can choose to only display the lot numbers using the **Lots without quantities** configuration entry (**Stock** category),

see [CRM.core Administrator Guide](#). If you have entered more than one delivery date, the **Quantity** field displays all delivery dates and you can enter the quantity for each delivery date. You can configure the behavior of the special input fields (**Quantity**, **Scale of discount**, **Lot No.**) in the Quick Add area, see [CRM.core Administrator Guide](#).

To add an order item directly:

1. Switch to the desired order.
2. Select **New > New Order Item** from the context menu.

Order Item 1 of Order 213000022

Menu | Edit | Save | Cancel | [Icon]

Item No. 11001
 Item name IND 40mg
 AU_SerNo 213000022
 Sector Own Product
 Brand Indramal

UP-SerNo 47
 Prod.Cat. Cardio-vascular
 Grade Tablet

Quantity/Price

Quantity 6
 Packaging Unit
 End Price 12,00
 Discount 0,00%
 Value 72,00

Currency Euro
 Pack. Unit Name
 Discount in k.
 VAT

3. Click on **Q (Select)** next to the **Item No.** field in the upper portion of the mask to select an item. The **Item name**, **Item No.**, **Sector**, **Product Group**, **Brand** and **Grade** are entered automatically.

The **Currency** is transferred from the order and cannot be edited. Individual currency values in fields can be displayed in a second currency. For this to occur an exchange rate needs to be entered.

4. Enter data such as the **Quantity** and any discount. The **Value** is automatically calculated by multiplying the **Quantity**, **End Price**, value factor and **Price Factor**. If a **Packaging Unit** and **Quantity factor** of "+- Qty" (in the offer) have been entered, the value factor is 1 / packaging unit; otherwise the value factor is 1. The **Price Factor** is transferred from the item master and is set to 1 by default. If suitable price lists exist, the **End Price** and **Value** are calculated automatically.

You can manually change the **End Price**.

5. Save. The **AU_SerNo** and **UP-SerNo** (serial number of the order and order item) are entered automatically.

The sum total of the item values (**Total Item Values** field) is calculated automatically. Other fields are calculated as for offer items,.

Note: If you have already entered items in an order, you can no longer edit the **Rep ID**, **Rep** and **Stock** fields in the order record.

Deliveries

Items in an order may be delivered on different dates. When adding an order item in the quick add area, information on the delivery is displayed in the **Quantity** field. Quantities can be entered for each delivery date. After saving the record, the total quantity (for all deliveries) is displayed in the **Quantity** field.

To enter a delivery date:

1. Switch to the desired order.
2. Click on **+** (**New**) on the **Order Delivery** tab.
3. Enter a **Delivery No.** and **Delivery Date**.

Note: Your administrator can determine that delivery data is also displayed for the **Discount vol. in kind** field, see [SerialEntry](#) in the Aurea CRM web Administrator Guide.

Copying Offers to Orders

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.

To copy an offer's data to an order:

1. Switch to the desired offer.
2. Select **Copy to Order** from the context menu. A new record is added and the relevant data (e.g. currency, items) is transferred to the new record.

Note: Participants are not copied.

The **Status** of the offer is automatically set to "Order".

For more details on which fields are copied from offers to orders, refer to the online field help. Your administrator can configure which additional fields are copied from offers to orders in the Configuration info area, see CRM.core Administrator Guide.


Note: Offer items where the **Optional item** field is enabled are not copied to the order. 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.

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. Switch to the **Orders** tab and click on **+** (**New**).

Note: Note: If **Payment Conditions** and **Delivery Conditions** have been entered for the company, these are transferred to the order (and the order items).

Order 56456 for Company BemComp

Menu | Edit | Save | Cancel | Print

AU-SerNo 56456	Date 01.03.2013
Receipt Type	Status Current
Rep ID <u>Chris Aki</u>	Business Area OTC
Contact Person	Stock
Quantity factor + Pack.Unit	
Value Miscellaneous	
Currency Euro	Disc. Order Val. 2 102,60
Indiv. Price List	Total Items Value 120,00
Payment Conditions 50% now, 50% later	Discount <input type="text" value=""/>
Value in Kind	Disc. Order % <input type="text" value="14,50%"/>

2. Enter data such as the **Currency**, **Quantity** and any discount.

Note: Note: Once the order has been saved, you can **no longer** edit the **Currency** field. The **Receipt Type** determines how stocks are affected by the order, >> on page 249.

3. Save the record.

The **AU-SerNo** field (the serial number of the order record) is entered automatically.

Adding Items to Orders

Individual items are added to orders using order item records.

You can either add items to orders individually or use the quick add function (select **Quick Add (Order Items)** from the order's context menu), >> on page 104. If a special offer has been entered in the order, only the **Overview** and **Special Offer** filters are available in the Quick Add area. Select **Special Offer** to display the special offer items defined for the special offer

Note: Note: The **End Price** entered in the price list (if present) is only displayed in the quick add area once the item has been saved. If you select the **Listing** filter, you can select a relationship type in the field beneath the filters, >> on page 212. The **Lot No.** column displays the lot numbers and current quantity. You can choose to only display the lot numbers using the **Lots without quantities** configuration entry (**Stock** category), >> CRM.core Administrator Guide. If you have entered more than one delivery date, the **Quantity** field displays all delivery dates and you can enter the quantity for each delivery date, >> on page 227. You can configure the behavior of the special input fields (**Quantity**, **Scale of discount**, **Lot No.**) in the Quick Add area, >> CRM.core Administrator Guide.

To add an order item directly:

1. Switch to the desired order.
2. Select **New > New Order Item** from the context menu.

Order Item 1 of Order 213000022

Menu | Edit | Save | Cancel | [Icon]

Item No. 11001
 Item name IND 40mg
 AU_SerNo 213000022
 Sector Own Product
 Brand Indramal

UP-SerNo 47
 Prod.Cat. Cardio-vascular
 Grade Tablet

Quantity/Price

Quantity 6
 Packaging Unit
 End Price 12,00
 Discount 0,00%
 Value 72,00

Currency Euro
 Pack. Unit Name
 Discount in k.
 VAT

3. Click on **(Select)** next to the **Item No.** field in the upper portion of the mask to select an item. The **Item name**, **Item No.**, **Sector**, **Product Group**, **Brand** and **Grade** are entered automatically.

The **Currency** is transferred from the order and cannot be edited. Individual currency values in fields can be displayed in a second currency. For this to occur an exchange rate needs to be entered, >> on page 172.

4. Enter data such as the **Quantity** and any discount. The **Value** is automatically calculated by multiplying the **Quantity**, **End Price**, value factor and **Price Factor**. If a **Packaging Unit** and **Quantity factor** of "+- Qty" (in the offer) have been entered, the value factor is 1 / packaging unit; otherwise the value factor is 1. The **Price Factor** is transferred from the item master and is set to 1 by default. If suitable price lists exist, the **End Price** and **Value** are calculated automatically, >> on page 199 and on page 177.

You can manually change the **End Price**.

5. Save.

The **AU_SerNo** and **UP-SerNo** (serial number of the order and order item) are entered automatically.

The sum total of the item values (**Total Item Values** field) is calculated automatically. Other fields are calculated as for offer items, >> on page 194.

Note: Note: If you have already entered items in an order, you can no longer edit the **Rep ID**, **Rep** and **Stock** fields in the order record.

Deliveries

Items in an order may be delivered on different dates. When adding an order item in the quick add area, information on the delivery is displayed in the **Quantity** field. Quantities can be entered for each delivery date. After saving the record, the total quantity (for all deliveries) is displayed in the **Quantity** field.

To enter a delivery date:

1. Switch to the desired order.
2. Click on ⊕ (**New**) on the **Order Delivery** tab.
3. Enter a **Delivery No.** and **Delivery Date**.

Note: Note: Your administrator can determine that delivery data is also displayed for the **Discount vol. in kind** field, see [SerialEntry](#) in the Aurea CRM web Administrator Guide.

Sales Areas

Learn how to define sales areas and assign items and offers to them.



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 is 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 sales area is entered in an offer or order, you can only select items assigned to the same sales area in Aurea CRM when adding items manually. The **Sales Area** filter is available in the quick add area.

Note: 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.

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 is 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 sales are 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.

Note: Note: 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: **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 and Discounts

Learn to apply pricing and discounts and item and order levels.

Pricing and discounts are applied at the offer and order level.

Note: The functions described here for orders also apply to offers.

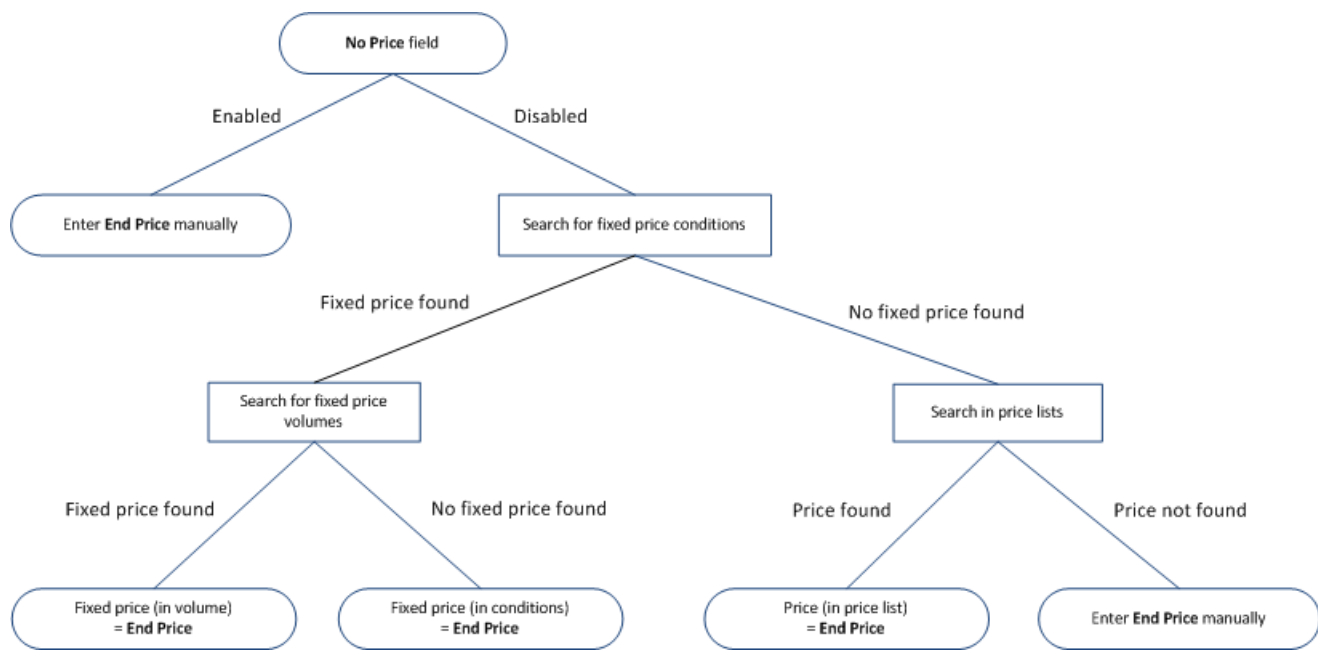
When adding an order, the value of the individual items and the total value of the order are determined as follows:

- If a **special offer** is entered in the order, the volume scale and discounts defined for the special offer are applied to the order.
- If no special offer is entered, the item and order values are determined as follows:
 1. **Pricing** for the individual items (using prices in price lists and fixed conditions).
 2. **Discount at the item level**, i.e. percentage discounts and discounts in kind defined in company and general conditions.
 3. **Discount at the order level**, i.e. percentage discounts defined in company and general conditions that are applied to the weighted total quantity of the order.

Pricing

When adding order items, Aurea CRM calculates the price (**End Price** field).

The following diagram illustrates how prices are determined:



When adding an order item:

1. **No price field:** The system checks whether the **No price** field is enabled in the order item (**Default**=disabled).
 - **Enabled:** You can enter a price manually in the **End Price** field, and conditions may be applied to this price.
 - **Disabled:** The system searches for fixed price conditions. Continue to step 2.
2. **Searching for fixed price conditions:** The system searches for fixed price conditions in the following order:
 - a. A record in the **Company Conditions** info area that meets the following criteria:
 - The **company** the order was added for is entered in the company conditions record
 - The **item** in the order item record is the item in the company conditions record
 - The **business area** in the order is entered in the company conditions record
 - The **Currency** in the order is entered in the company conditions record
 - A **fixed price** is entered in the company conditions record
 - The company conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)
 - b. A record in the **Conditions** info area that meets the following criteria :
 - The **customer group** entered in the conditions matches the customer group assigned to the customer the order was added for
 - The **item** in the order item record is the item in the conditions record
 - The **currency** in the order is entered in the conditions record

- A **fixed price** is entered in the conditions record
 - The conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)
 - **If a fixed price is found:** If a fixed price is found in a suitable company conditions or conditions record, the system searches for a matching **fixed price volume** (**Volume Type** = "Fixed price scale" and **Comp. value** = "Order Item").
 - **Searching for fixed price volumes:**
 - **If no fixed price is found:** The system searches for a price entered in a price list. Continue to step 3.
3. **Searching in price lists:** The system searches for a price in price lists in the following order:
- a. An **individual price list** if the **Indiv. Price List** field in the order contains a price list,
 - b. A **customer group price list** if a customer group has been entered in the company record,
 - c. A **country price list** defined for the country the company is located in.

The price list must meet the following conditions:

- The **item** in the order item record is the item in the price list
- The **currency** in the order is entered in the price list
- the price list is currently valid (i.e. the date of the order lies in the time period that the price list is valid for)

The first price list found is used. If no suitable price list is found, no price is entered. In this case you need to enter the price manually in the **End Price** field.

Note: If an end price was determined by the system, you can edit it.

4. Once you have entered a **Quantity** in the order item, the value of the corresponding items is entered in the **Value** field (calculated as **Quantity * End Price * value factor * Price Factor**). The items' values are totaled in the **Total Items Value** field in the order each time an order item record is saved.

If applicable, discounts are applied to the order items, i.e. percentage discounts and discounts in kind defined in company and general conditions.

After saving an order item record, the discount on the order level (if applicable) is recalculated.

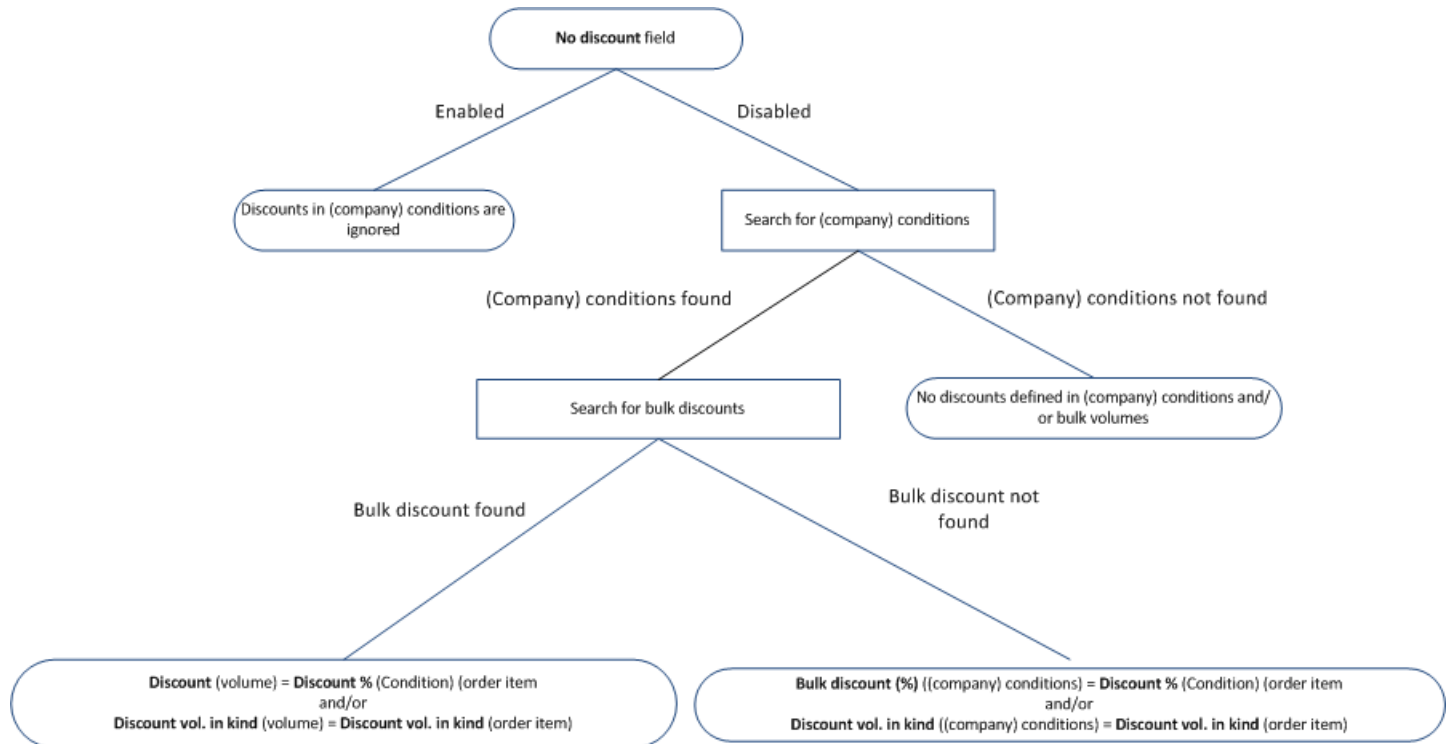
Discounts at the Item Level

Once the **End Price** and **Quantity** have been entered in an order item record, Aurea CRM searches for valid conditions, company conditions and volume scales in order to determine which discounts and discounts in kind apply.

Note: If you enable the **No discount** field when adding a new order item, the system does not search for valid conditions for the item and the item is ignored when calculating the discount applied to the weighted total quantity of the order, >> on

page 203. This field is disabled by default. If a **Discount** is entered in the conditions record, this discount is transferred to the **Discount % (Condition)** field in the order. The bulk discounts entered in the conditions record (**Bulk discount (%)** field) and in volumes (**Discount** field) are not applied.

The following diagram illustrates how discounts are determined:



The system searches for valid conditions in the following order:

1. A record in the **Company Conditions** info area that meets the following criteria:
 - The **company** the order was added for is entered in the company conditions record
 - The **business area** in the order is entered in the company conditions record
 - The **item (Item No. and Item Name)**, **sector**, **product group**, **brand** or **grade** entered in the company conditions match those entered in the order item

Note: These fields cannot be combined in company conditions.

- The **currency** in the order is entered in the company conditions record

- A **Bulk discount (%)** and/or **Discount vol. in kind** have been entered in the company conditions record
 - The company conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)
2. A record in the **Conditions** info area that meets the following criteria:
- The **customer group** entered in the conditions matches the customer group assigned to the customer the order was added for
 - The **item (Item No. and Item Name), Sector, Product Group, Brand or Grade** entered in the conditions match those entered in the order item

Note: These fields cannot be combined in conditions.

- The **currency** in the order is entered in the conditions record
 - A **Bulk discount (%)** and/or **Discount vol. in kind** have been entered in the conditions record
 - The conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)
3. If suitable company conditions or generally conditions are found, the system searches for a suitable **scale of discount (Volume Type = "Scale of discount" and Comp. value = "Order Item")**.
4. The discount determined is entered in the order item:
- Discount in kind are entered in the **Discount vol. in kind** field
 - Percentage discounts are entered in the **Discount % (Condition)** field. Depending on the settings selected in the **Conditions apply to** field (in the company or general conditions), this discount is applied in addition to the item discount (**Discount** field); or only if no discount is entered in the **Discount** field; or the discount entered in the conditions overwrites the discount in the **Discount** field.
5. The value of the items is calculated based on the discount in the order item and conditions record as follows:
- **Value = Quantity * End price * value factor * Price factor**
 - **Discount abs. = Value * Discount / 100**
 - **Disc.Value1 = Value - Discount abs.**
 - **Disc.Value2 = Disc.Value1 - Discount % (Conditions) - Item Group Discount**

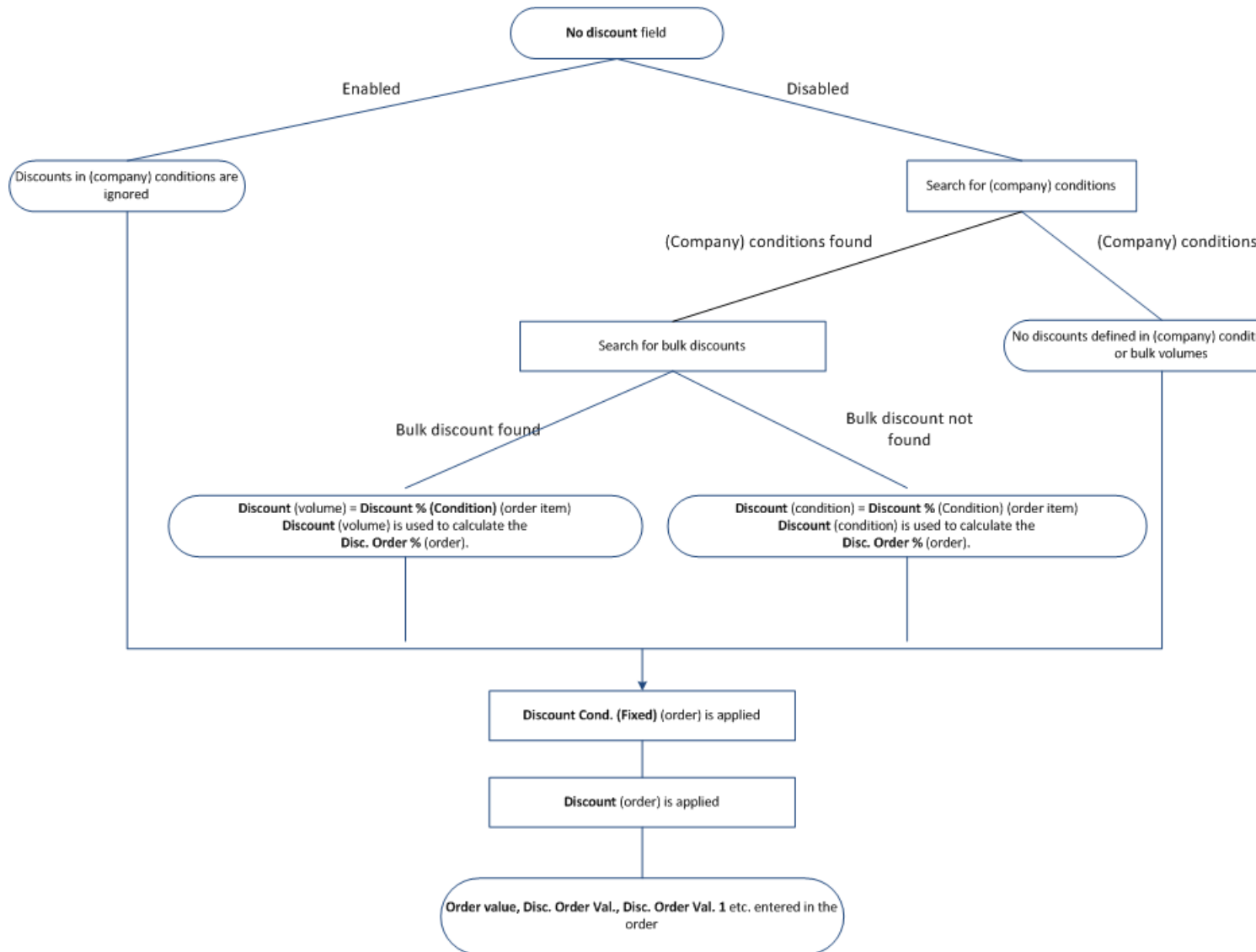
After saving each order item, the discounts at the order level are recalculated (if present).

Note: Discounts entered in conditions at the order level overwrite discounts in conditions at the item level.

Discounts at the Order Level

After saving each order item, the discounts at the order level are recalculated.

The following diagram illustrates the order in which discounts are applied and how discounts are determined at the order level:



Discounts are determine in the following order:

1. To determine the discount applied to the weighted total quantity in the order, Aurea CRM searches for valid conditions in the following order:

Note: A valid **weighting** must be entered in the order item, >> on page 178. If the **No discount** field in the order is enabled, the system does not search for applicable conditions. In order for bulk discounts to be applied, the **Bulk discount**

(%) field must be empty. If discounts in kind have been defined in conditions or bulk volumes (**Discount vol. in kind** field), they are transferred to the order item.

a. A record in the **Company Conditions** info area that meets the following criteria (>> on page 234):

- The **Company** the order was added for is entered in the company conditions record
 - The **Business Area** in the order is entered in the company conditions record
 - The **item (Item No. and Item name)**, **Sector**, **Product Group**, **Brand** or **Grade** entered in the company conditions match those entered in the order item
-

Note: These fields cannot be combined in company conditions.

- The **Currency** in the order is entered in the company conditions record
- A **Discount** is entered in the company conditions record

The company conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)

b. A record in the **Conditions** info area that meets the following criteria (>> on page 233):

- The **Customer Group** entered in the conditions matches the customer group assigned to the customer the order was added for
 - The **item (Item No. and Item name)**, **Sector**, **Product Group**, **Brand** or **Grade** entered in the conditions match those entered in the order item
-

Note: These fields cannot be combined in conditions.

- The **Currency** in the order is entered in the conditions record
- A **Discount** is entered in the conditions record
- The conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)

c. If suitable company conditions or generally conditions are found, the system searches for a suitable **Scale of discount (Volume Type = "Scale of discount (weighted total quantity)"** and **Comp. value = "Total Order"**), >> on page 235.

Note: If more than one order item has been entered containing the same item, the total quantity entered in all order items is used to determine the volume and any discount.

d. The discount determined is entered in the **Discount % (Condition)** field in item records, whereby discounts at the order level overwrite discounts at the item

level. The discount is also used to calculate the **Disc. Order %** in the order and the.

- e. The **Disc.Value2** field in the item records is updated accordingly.
2. After applying discounts from conditions (if present), the discount entered for the company is deducted (**Discount Cond. (Fixed)** field in the order).
3. If present, any order discount (**Discount** field) granted manually is then deducted.

Fields in Order Value Calculations

Field	Calculation
Total Items Value	Sum total of the item values (Value field) where Discount in k. is disabled
Value in Kind	Sum total of the item values (Value field) where Discount in k. is enabled
Order Value	Total Items Value - Discount Cond. (Fixed) - Cash Cond. (Special Offer) Discount Cond. (Fixed) is transferred from the company Cash Cond. (Special Offer) is transferred from the special offer
Disc. Order Val.	Total Items Value - Discount Cond. (Fixed) - Discount You can define an additional discount applied at the order level in the Discount field.
Disc. Order Val. 1	Sum total of the Disc.Value2 fields in those items where Discount in k. is disabled (discount from the conditions applied at the order level).
Disc. Order Val. 2	Disc. Order Val. 1 - Discount Cond. (Fixed) - Discount
Disc. Order %	Total discount as a percentage, calculated from Disc. Order Val. 2 / Total Items Value -1.

Pricing for Special Offers

If a special offer is entered in the order, the volume scale and discounts defined for the special offer are applied to the order. Special offers are managed in the **Special Offer** info area.

Special offer volume scales and discounts applied to item groups are taken into account prior to conditions when pricing items and applying discounts.

Enter the special offer in **Special Offer Name** field in the order. You can only access special offers that are currently valid; i.e. the current date needs to be between the start and end date of the special offer.

Note: If you add order items **manually** (i.e. not using the quick add function), prices defined for special offers are not calculated automatically, even if the item is currently on special offer. Company conditions and general conditions are however applied. If you enter a special offer in the order, no links to work orders are available. You can use the same business logic as used in Aurea CRM win in Aurea CRM web. In this case, only those special offers where no customer group or the same customer group is entered as the company the order was added for. To do so, add the **Customer Group** (FI,147) field to the order's tab view and use it as a fixed filter applied to the search (in the record selector, e.g. for the **Special Offer Name** field).

You can use the **Additional items** field special offers in Aurea CRM win to determine how the quick add area for order items behaves.

- **Enabled:** All items are displayed. All radio buttons are active and you can use the **Special Offer** option to display all special offer item as a list of suggestions.
- **Disabled:** Only special offer items are listed. Only the **Overview** and **Special Offer** options are active. Select **Overview** to display all items where quantities have been entered; select **Special Offer** to display all special offer items.

Special Offer Volume Scales

If you have defined bulk discounts and/or discounts in kind in a special offer item record, these can be displayed in the quick add area (**Scale of discount** field), see [Aurea CRM win Administrator Guide](#).

If you select a different scale in the **Scale of discount** field, the lower limit of the scale's volume is entered in the **Quantity** field and the corresponding discounts are entered in the **Discount % (Condition)** and **Discount vol. in kind** fields. Your administrator can disable this behavior using the **Do not apply scale of discount** configuration entry (**General Settings** category), see [CRM.core Administrator Guide](#).

Corresponding order items can be created automatically using triggers (see [CRM.core Administrator Guide](#)) for the units granted as a discount in kind.

Item Group Discounts

You can group special offer items and define volumes that apply to these groups.

Whenever a new offer/order item is added, the system searches for a suitable volume by totaling the **Quantity** and **Value** fields in all items. If a new volume has been reached, all affected items are updated (**Item Group Discount**, **Item Group Discount in Kind**, **Total discount in kind**, **Disc.Value2**).

Note: The quick add areas in Aurea CRM web are not automatically refreshed by default. To use the functions described here in Aurea CRM web, the "Refresh" button needs to be integrated in the quick add areas (e.g. in the 'SerialEntry.List' header for the 'AU' header group for orders).

When granting discounts in kind on item groups, new offer/order items are not automatically added; the existing item records are only updated (**Item Group Discount in Kind** and **Total discount in kind** fields). A new item record is not added for special offer items in orders/offers where the **Discount in kind share** is positive.

Discount scales at the item group level are **not** displayed in the **Scale of discount** field.

Note: Special offer bulk volumes and volumes defined for item groups can overlap.

Transferring Individual Fields from Special Offers

The following fields are transferred from special offer items to the following fields in order items:

Special Offer Item Field	Target Order Item Field
Price	Special Offer Item Price
Quantity	Special Offer Item Qty
Special Offer Name	Special Offer Name

The **Special Offer Item Price** is converted to the currency in the order item. An appropriate exchange rate needs to have been defined, otherwise the field remains empty.

Pricing

When adding order items, Aurea CRM calculates the price (**End Price** field).

The following diagram illustrates how prices are determined:



When adding an order item:

1. **No price** field: The system checks whether the **No price** field is enabled in the order item (disabled by default).
 - **Enabled:** You can enter a price manually in the **End Price** field, and conditions may be applied to this price, >> on page 201.
 - **Disabled:** The system searches for fixed price conditions. Continue to step 2.
2. **Searching for fixed price conditions:** The system searches for fixed price conditions in the following order:
 - a. A record in the **Company Conditions** info area that meets the following criteria (>> on page 234):
 - The **company** the order was added for is entered in the company conditions record
 - The **item** in the order item record is the item in the company conditions record
 - The **business area** in the order is entered in the company conditions record
 - The **Currency** in the order is entered in the company conditions record
 - A **fixed price** is entered in the company conditions record
 - The company conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)
 - b. A record in the **Conditions** info area that meets the following criteria (>> on page 233):
 - The **customer group** entered in the conditions matches the customer group assigned to the customer the order was added for
 - The **item** in the order item record is the item in the conditions record
 - The **currency** in the order is entered in the conditions record
 - A **fixed price** is entered in the conditions record
 - The conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)
- **If a fixed price is found:** If a fixed price is found in a suitable company conditions or conditions record, the system searches for a matching **fixed price volume** (**Volume Type** = "Fixed price scale" and **Comp. value** = "Order Item"), >> on page 235.
- **Searching for fixed price volumes:**
- **If no fixed price is found:** The system searches for a price entered in a price list, >> on page 177. Continue to step 3.

3. **Searching in price lists:** The system searches for a price in price lists in the following order:

- a. An **individual price list** if the **Indiv. Price List** field in the order contains a price list,
- b. A **customer group price list** if a customer group has been entered in the company record,
- c. A **country price list** defined for the country the company is located in.

The price list must meet the following conditions:

- The **item** in the order item record is the item in the price list
- The **currency** in the order is entered in the price list
- the price list is currently valid (i.e. the date of the order lies in the time period that the price list is valid for)

The first price list found is used. If no suitable price list is found, no price is entered. In this case you need to enter the price manually in the **End Price** field.

Note: Note: If an end price was determined by the system, you can edit it.

4. Once you have entered a **Quantity** in the order item, the value of the corresponding items is entered in the **Value** field (calculated as **Quantity * End Price * value factor * Price Factor**). (The items' values are totaled in the **Total Items Value** field in the order each time an order item record is saved.)

If applicable, discounts are applied to the order items, i.e. percentage discounts and discounts in kind defined in company and general conditions, >> on page 201.

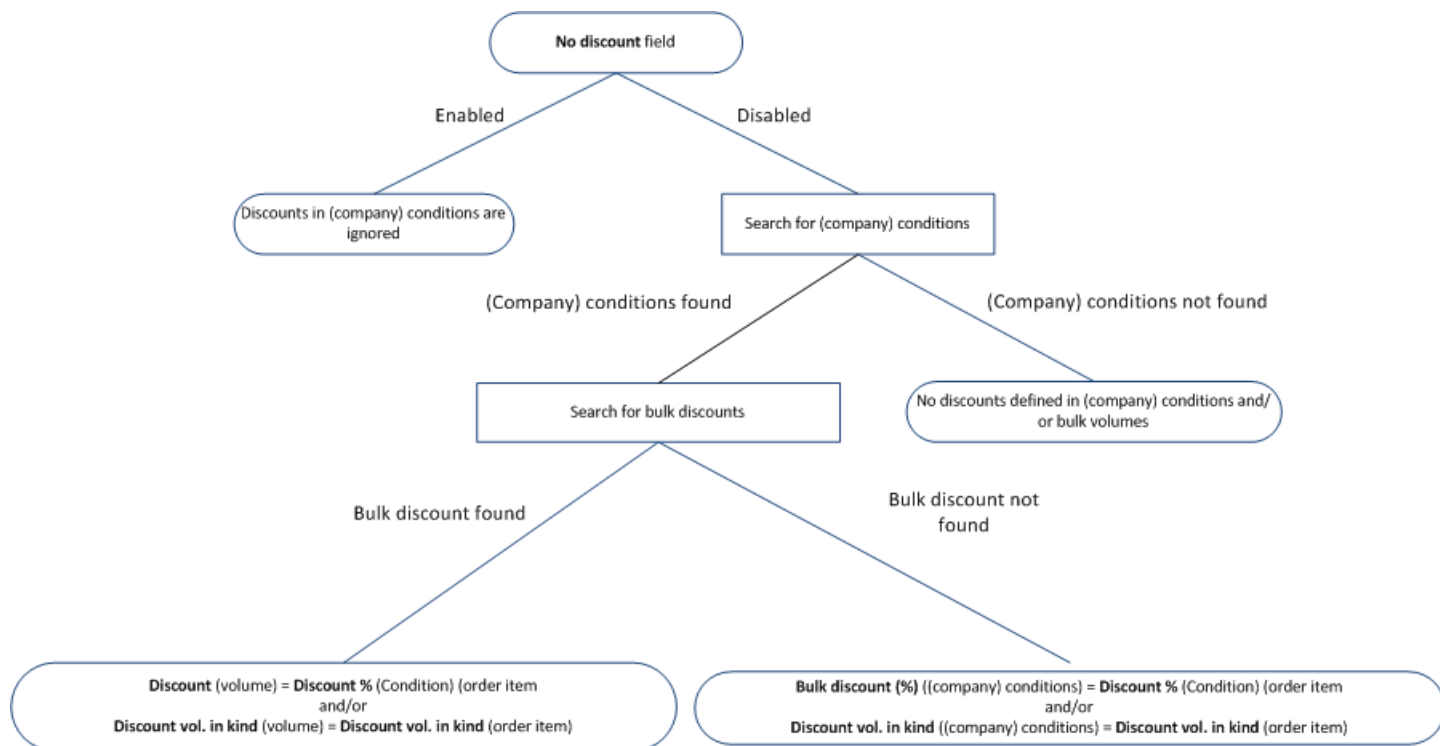
After saving an order item record, the discount on the order level (if applicable) is recalculated, >> on page 203.

Discounts at the Item Level

Once the **End Price** and **Quantity** have been entered in an order item record, Aurea CRM searches for valid conditions, company conditions and volume scales in order to determine which discounts and discounts in kind apply.

Note: Note: If you enable the **No discount** field when adding a new order item, the system does not search for valid conditions for the item and the item is ignored when calculating the discount applied to the weighted total quantity of the order, >> on page 203. This field is disabled by default. If a **Discount** is entered in the conditions record, this discount is transferred to the **Discount % (Condition)** field in the order. The bulk discounts entered in the conditions record (**Bulk discount (%)** field) and in volumes (**Discount** field) are not applied.

The following diagram illustrates how discounts are determined:



The system searches for valid conditions in the following order:

1. A record in the **Company Conditions** info area that meets the following criteria (>> on page 234):
 - The **company** the order was added for is entered in the company conditions record
 - The **business area** in the order is entered in the company conditions record
 - The **item (Item No. and Item Name), sector, product group, brand or grade** entered in the company conditions match those entered in the order item

Note: Note: These fields cannot be combined in company conditions.

- The **currency** in the order is entered in the company conditions record

- A **Bulk discount (%)** and/or **Discount vol. in kind** have been entered in the company conditions record
 - The company conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)
2. A record in the **Conditions** info area that meets the following criteria (>> on page 233):
- The **customer group** entered in the conditions matches the customer group assigned to the customer the order was added for
 - The **item (Item No. and Item Name), Sector, Product Group, Brand or Grade** entered in the conditions match those entered in the order item

Note: Note: These fields cannot be combined in conditions.

- The **currency** in the order is entered in the conditions record
 - A **Bulk discount (%)** and/or **Discount vol. in kind** have been entered in the conditions record
 - The conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)
3. If suitable company conditions or generally conditions are found, the system searches for a suitable **scale of discount (Volume Type = "Scale of discount" and Comp. value = "Order Item")**, >> on page 235.
4. The discount determined is entered in the order item:
- Discount in kind are entered in the **Discount vol. in kind** field
 - Percentage discounts are entered in the **Discount % (Condition)** field. Depending on the settings selected in the **Conditions apply to** field (in the company or general conditions), this discount is applied in addition to the item discount (**Discount** field); or only if no discount is entered in the **Discount** field; or the discount entered in the conditions overwrites the discount in the **Discount** field, >> on page 233.
5. The value of the items is calculated based on the discount in the order item and conditions record as follows:
- **Value = Quantity * End price * value factor * Price factor**
 - **Discount abs. = Value * Discount / 100**
 - **Disc.Value1 = Value - Discount abs.**
 - **Disc.Value2 = Disc.Value1 - Discount % (Conditions) - Item Group Discount**

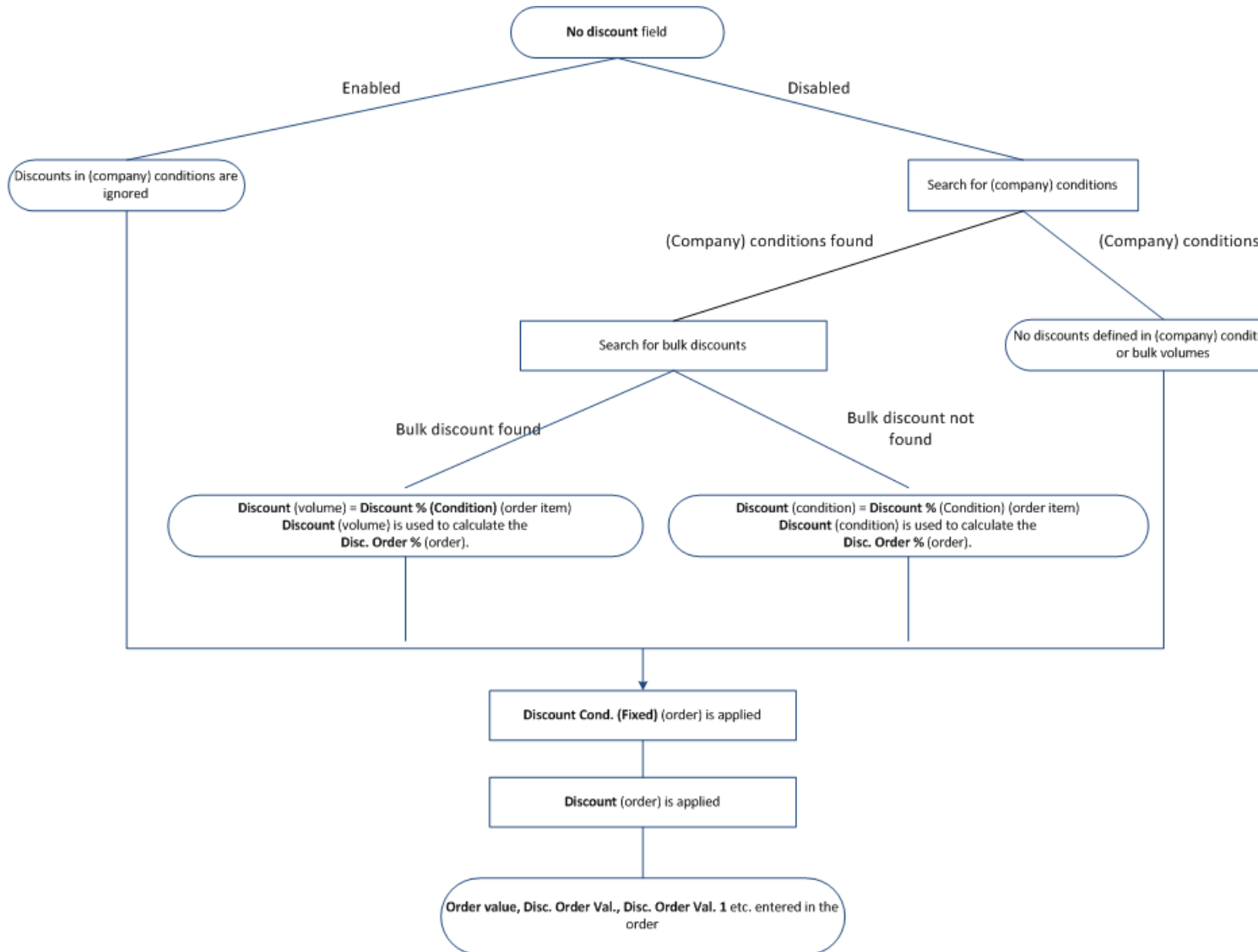
After saving each order item, the discounts at the order level are recalculated (if present), >> on page 203.

Note: Note: Discounts entered in conditions at the order level overwrite discounts in conditions at the item level.

Discounts at the Order Level

After saving each order item, the discounts at the order level are recalculated.

The following diagram illustrates the order in which discounts are applied and how discounts are determined at the order level:



Discounts are determine in the following order:

1. To determine the discount applied to the weighted total quantity in the order, Aurea CRM searches for valid conditions in the following order:

Note: Note: A valid **weighting** must be entered in the order item, >> on page 178. If the **No discount** field in the order is enabled, the system does not search for applicable conditions. In order for bulk discounts to be applied, the **Bulk discount (%)** field must be empty. If discounts in kind have been defined in conditions or bulk volumes (**Discount vol. in kind** field), they are transferred to the order item.

a. A record in the **Company Conditions** info area that meets the following criteria (>> on page 234):

- The **Company** the order was added for is entered in the company conditions record
 - The **Business Area** in the order is entered in the company conditions record
 - The **item (Item No. and Item name)**, **Sector**, **Product Group**, **Brand** or **Grade** entered in the company conditions match those entered in the order item
-

Note: Note: These fields cannot be combined in company conditions.

- The **Currency** in the order is entered in the company conditions record
- A **Discount** is entered in the company conditions record

The company conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)

b. A record in the **Conditions** info area that meets the following criteria (>> on page 233):

- The **Customer Group** entered in the conditions matches the customer group assigned to the customer the order was added for
 - The **item (Item No. and Item name)**, **Sector**, **Product Group**, **Brand** or **Grade** entered in the conditions match those entered in the order item
-

Note: Note: These fields cannot be combined in conditions.

- The **Currency** in the order is entered in the conditions record
- A **Discount** is entered in the conditions record
- The conditions record is currently valid (i.e. the date of the order lies in the time period that the conditions are valid for)

c. If suitable company conditions or generally conditions are found, the system searches for a suitable **Scale of discount (Volume Type = "Scale of discount (weighted total quantity)"** and **Comp. value = "Total Order"**), >> on page 235.

Note: Note: If more than one order item has been entered containing the same item, the total quantity entered in all order items is used to determine the volume and any discount.

- d. The discount determined is entered in the **Discount % (Condition)** field in item records, whereby discounts at the order level overwrite discounts at the item level. The discount is also used to calculate the **Disc. Order %** in the order and the.
 - e. The **Disc.Value2** field in the item records is updated accordingly.
2. After applying discounts from conditions (if present), the discount entered for the company is deducted (**Discount Cond. (Fixed)** field in the order).
 3. If present, any order discount (**Discount** field) granted manually is then deducted.

Fields in Order Value Calculations

Field	Calculation
Total Items Value	Sum total of the item values (Value field) where Discount in k. is disabled
Value in Kind	Sum total of the item values (Value field) where Discount in k. is enabled
Order Value	Total Items Value - Discount Cond. (Fixed) - Cash Cond. (Special Offer) Discount Cond. (Fixed) is transferred from the company Cash Cond. (Special Offer) is transferred from the special offer
Disc. Order Val.	Total Items Value - Discount Cond. (Fixed) - Discount You can define an additional discount applied at the order level in the Discount field.
Disc. Order Val. 1	Sum total of the Disc.Value2 fields in those items where Discount in k. is disabled (discount from the conditions applied at the order level).
Disc. Order Val. 2	Disc. Order Val. 1 - Discount Cond. (Fixed) - Discount
Disc. Order %	Total discount as a percentage, calculated from Disc. Order Val. 2 / Total Items Value -1.

Pricing for Special Offers

If a special offer is entered in the order, the volume scale and discounts defined for the special offer are applied to the order. Special offers are managed in the **Special Offer** info area.

Special offer volume scales and discounts applied to item groups are taken into account prior to conditions when pricing items and applying discounts.

Enter the special offer in **Special Offer Name** field in the order. You can only access special offers that are currently valid; i.e. the current date needs to be between the start and end date of the special offer.

Note: Note: If you add order items **manually** (i.e. not using the quick add function), prices defined for special offers are not calculated automatically, even if the item is currently on special offer. Company conditions and general conditions are however applied. If you enter a special offer in the order, no links to work orders are available, >> on page 229. You can use the same business logic as used in Aurea CRM win in Aurea CRM web. In this case, only those special offers where no customer group or the same customer group is entered as the company the order was added for. To do so, add the **Customer Group** (FI,147) field to the order's tab view and use it as a fixed filter applied to the search (in the record selector, e.g. for the **Special Offer Name** field).

You can use the **Additional items** field special offers in Aurea CRM win to determine how the quick add area for order items behaves.

- **Enabled:** All items are displayed. All radio buttons are active and you can use the **Special Offer** option to display all special offer item as a list of suggestions.
- **Disabled:** Only special offer items are listed. Only the **Overview** and **Special Offer** options are active. Select **Overview** to display all items where quantities have been entered; select **Special Offer** to display all special offer items.

Special Offer Volume Scales

If you have defined bulk discounts and/or discounts in kind in a special offer item record (>> on page 228), these can be displayed in the quick add area (**Scale of discount** field), >> Aurea CRM win Administrator Guide.

If you select a different scale in the **Scale of discount** field, the lower limit of the scale's volume is entered in the **Quantity** field and the corresponding discounts are entered in the **Discount % (Condition)** and **Discount vol. in kind** fields. Your administrator can disable this behavior using the **Do not apply scale of discount** configuration entry (**General Settings** category), >> CRM.core Administrator Guide.

Corresponding order items can be created automatically using triggers (>> CRM.core Administrator Guide) for the units granted as a discount in kind.

Item Group Discounts

You can group special offer items and define volumes that apply to these groups, >> on page 228.

Whenever a new offer/order item is added, the system searches for a suitable volume by totaling the **Quantity** and **Value** fields in all items. If a new volume has been reached, all affected items are updated (**Item Group Discount**, **Item Group Discount in Kind**, **Total discount in kind**, **Disc.Value2**).

Note: Note: The quick add areas in Aurea CRM web are not automatically refreshed by default. To use the functions described here in Aurea CRM web, the "Refresh" button needs to be integrated in the quick add areas (e.g. in the 'SerialEntry.List' header for the 'AU' header group for orders).

When granting discounts in kind on item groups, new offer/order items are not automatically added; the existing item records are only updated (**Item Group Discount in Kind** and **Total discount in kind** fields). A new item record is not added for special offer items in orders/offers where the **Discount in kind share** is positive.

Discount scales at the item group level are **not** displayed in the **Scale of discount** field.

Note: Note: Special offer bulk volumes and volumes defined for item groups can overlap.

Transferring Individual Fields from Special Offers

The following fields are transferred from special offer items to the following fields in order items:

Special Offer Item Field	Target Order Item Field
Price	Special Offer Item Price
Quantity	Special Offer Item Qty
Special Offer Name	Special Offer Name

The **Special Offer Item Price** is converted to the currency in the order item. An appropriate exchange rate needs to have been defined, otherwise the field remains empty.

Transferring Individual Fields from Special Offers

The following fields are transferred from special offer items to the following fields in order items:

Special Offer Item Field	Target Order Item Field
Price	Special Offer Item Price
Quantity	Special Offer Item Qty
Special Offer Name	Special Offer Name

The **Special Offer Item Price** is converted to the currency in the order item. An appropriate exchange rate needs to have been defined (>> on page 171), otherwise the field remains empty.

Addresses

You can enter the company's address or an additional address in offers/orders.

In addition, you can specify up to 5 wholesalers including branch offices responsible for supplying the company. Wholesalers themselves are companies in the database. Enter the wholesaler by entering the keys in the **Wholes. Grp 1-5** and **Wholes.No. 1-5** fields.

When a new offer/order is added, the first wholesaler is automatically entered (**Addr. FI_StaNo.** and **Addr. FI_SerNo**; and **FI-StaNo (wholesaler)** and **FI-SerNo (wholesaler)** fields. The wholesalers address data is also transferred.

To enter another wholesaler or company address, select **Address** from the context menu in the **Offer/Order** info area. A list of the available wholesalers is displayed.

If you select another wholesaler, the company's data is transferred to the order or offer.

The **Type** column displays the type of address. Possible values:

- FI – company address
- Wholesaler - wholesaler entered in the company record
- OA – additional address added for the company

If you select an address, the address type is entered in the **Address Type** field in the offer/order.


Note: Only those additional addresses that are company-related are available when adding orders; you do not have access to person-related addresses.






11

Refunding

Refunding

Use the Refunding info area to store refunds - influence stocks without an invoice. For example - You can use refunding info area to store refunds for exchanged goods.

 **Refunding 34432423**

Menu |  Edit |  Save |  Cancel |  

VG-SerNo 34432423	Date 16.09.2013
Cust. Rcpt. No.	Rep ID <u>Stephen Smith</u>
Status Current	Receipt Type
Stock	Quantity factor + Pack.Unit
Payment Conditions	Delivery Conditions
Value	Currency Euro
Contact Person	

Cash Refunding
Text

Cash Refund 1	Reason 1
Cash Refund 2	Reason 2
Cash Refund 3	Reason 3
Cash Refund 4	Reason 4
Cash Refund 5	Reason 5

The **Refunding** info area only differs marginally from the **Order** info area in its functionality and is mainly used to exchange goods or for cash refunds should you wish to manage these separately from the order. The corresponding revenue information can be made available here as well. As such information is often maintained in external systems, you can also transfer refund information from other systems to Aurea CRM.

You can display individual fields in the **Refunding** and **Refunding Item** info areas in a second currency. For this to occur an exchange rate needs to be entered.

To add a new refunding record:

1. Switch to the desired company and select **New > Refunding** from the context menu.
2. Enter data such as the **Currency**, **Stock**, **Receipt Type** etc.
3. Enter additional data such as cash refunds on the various tabs and enter a **Reason**.
4. Save. The **VG-SerNo** is entered automatically.

You can either add refunding items directly or select **Quick Add (Items)** from the refunding's context menu to use the quick add function.

To add refunding items individually:

1. Switch to the refunding record you wish to add the item to, and select **Refunding Items** from the context menu.
2. Click on **⊕ (New)**.

Refunding Item IND 40mg

Menu | Edit | Save | Cancel |  v

Refunding Item No. 1	Item No. 11001
Item name IND 40mg	Prod.Cat. Cardio-vascular
Sector Own Product	Grade Tablet
Brand Indramal	Lot No.
EAN-No.	
Lot/Quantity	
Volume/Price Text	
Quantity 2	Inventory quantity 4
Packaging Unit 2	Pack. Unit Name
End Price 30,00	VAT <input type="text"/>
Value 60,00	Currency Euro
Discount <input type="text"/> 0,00%	Special Offer Name

Select an item from the **Item No.** field. The **Item name**, **Sector**, **Product Group**, **Brand** and **Grade** are entered automatically.

3. Enter additional data such as the **Quantity** and **End Price** on the various tabs. The value is automatically calculated (**Value = Quantity * End Price**).

Note: Note: If a price list exists for the item, the **End Price** is transferred from the price list. You can manually change the **End Price**.

The **Value** in the refunding record is calculated from the sum total of all refunding items.

12

Product Detailing

Product Detailing

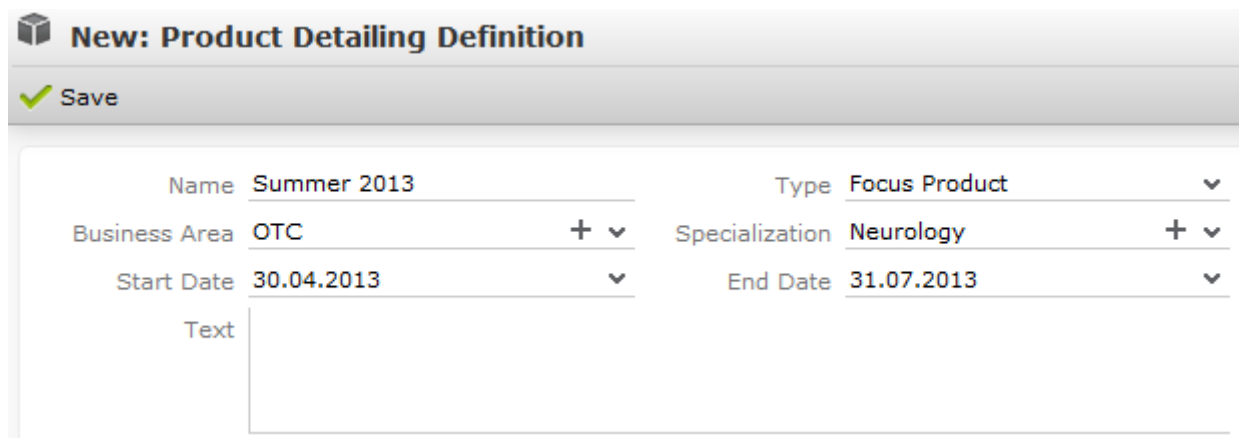
Learn how to use the Product Detailing info area to define products and various items that is the subject of your focus for the defined time period.

You can select certain products in your item master that should receive special attention for a specific time period. Reps can link these items to activity records using the quick add features and enter the customer responses.

Adding a Product Discussion Definition

In order to define which products is focused and transferred to activities when discussing them:

1. Select  (Products & Service) > **New Product Detailing Definition.**



Name	Summer 2013	Type	Focus Product
Business Area	OTC	Specialization	Neurology
Start Date	30.04.2013	End Date	31.07.2013
Text			

2. Enter a **Name**.
3. Enter a **Type**. The items displayed in the quick add area can be filtered based on this type.

4. Enter the time period that this product should be focused on in the **Start Date** and **End Date** fields. Only those items are displayed in the **Quick Add (Product Detailing)** area where the current date is in the defined time period.
5. Enter the **Business Area** and/or **Specialization**. The items that are displayed in the quick add area for product detailing records are determined based on this data as follows:
 - Items where the business area entered in the product detailing definition matches the rep assigned to the activity are displayed.
 - Items where no specialization is entered are displayed.
 - Items where the specialization matches the one of the specializations entered in the person record (**Spec. 1-5** fields) the activity was added for are displayed.

Note: Only one record may exist for the same combination of **Type**, **Business Area** and **Specialization** for a certain time period.

To add product detailing definition items:

1. Switch to the desired product detailing definition and select **New Product Detailing Definition Item** from the context menu.

The screenshot shows a form titled "Focus Product Item 1" with a menu bar containing "Menu", "Edit", "Save", "Cancel", and a dropdown icon. The form fields are as follows:

Line No. 1	SP-SerNo 14
Item No. 11001	
Item name IND 40mg	
Sector Own Product	Product Group Cardio-vascular
Brand Indramal	Grade Tablet
Text	

2. Select an item from the **Item No.** field. The **Item name**, **Product Group**, **Sector**, **Brand** and **Grade** fields are transferred automatically from the item master.
3. Save. The **Item No.** and **SP-SerNo** fields are entered automatically.

Discussing Products

Products are discussed with customers with the scope of activities (e.g. visits). You can store the customer's response the various items.

To add a product detailing record:

1. Switch to the desired activity or add a new one.
2. Select **Quick Add (Product Detailing)** from the context menu.
3. Select a filter to display the items defined for the selected type (**Focus Product** or **Standard Focus Product**). Select **All** to display all items in the currently valid product detailing definitions (of all types) where the business area is the same as your own and where the specialization (if available) matches that of the person the activity is linked to. Click on **Overview** to display an overview of the entered items.

4. Enter the desired data.
5. Save. A product detailing record and product detailing item record is added for each of the items you have entered.

Editing Product Detailing Records


To display and edit product detailing and product detailing item records:


1. Switch to the desired activity.
2. Select **Go to All Related > All Product Detailings** from the context menu. The product detailing records added for the activity are displayed.
3. Switch to the desired record. The product detailing item records are displayed and can be edited.

Adding a Product Discussion Definition

In order to define which products is focused and transferred to activities when discussing them:

1. Select  (Products & Service) > **New Product Detailing Definition**.

 **New: Product Detailing Definition**

 Save

Name <u>Summer 2013</u>	Type <u>Focus Product</u> ▼
Business Area <u>OTC</u> + ▼	Specialization <u>Neurology</u> + ▼
Start Date <u>30.04.2013</u> ▼	End Date <u>31.07.2013</u> ▼
Text <input style="width: 100%; height: 40px;" type="text"/>	

2. Enter a **Name**.
3. Enter a **Type**. The items displayed in the quick add area can be filtered based on this type, >> on page 210.

4. Enter the time period that this product should be focused on in the **Start Date** and **End Date** fields. Only those items are displayed in the **Quick Add (Product Detailing)** area where the current date is in the defined time period.
5. Enter the **Business Area** and/or **Specialization**. The items that are displayed in the quick add area for product detailing records are determined based on this data as follows:
 - Items where the business area entered in the product detailing definition matches the rep assigned to the activity are displayed.
 - Items where no specialization is entered are displayed.
 - Items where the specialization matches the one of the specializations entered in the person record (**Spec. 1-5** fields) the activity was added for are displayed.

Note: Note: Only one record may exist for the same combination of **Type**, **Business Area** and **Specialization** for a certain time period.

To add product detailing definition items:

1. Switch to the desired product detailing definition and select **New Product Detailing Definition Item** from the context menu.

Focus Product Item 1

Menu | Edit | Save | Cancel |

Line No. 1	SP-SerNo 14
Item No. 11001	
Item name IND 40mg	
Sector Own Product	Product Group Cardio-vascular
Brand Indramal	Grade Tablet
Text	

2. Select an item from the **Item No.** field. The **Item name**, **Product Group**, **Sector**, **Brand** and **Grade** fields are transferred automatically from the item master.
3. Save. The **Item No.** and **SP-SerNo** fields are entered automatically.

Discussing Products

Products are discussed with customers with the scope of activities (e.g. visits). You can store the customer's response the various items.

To add a product detailing record:

1. Switch to the desired activity or add a new one, >> on page 141.
2. Select **Quick Add (Product Detailing)** from the context menu, >> on page 104.

3. Select a filter to display the items defined for the selected type (**Focus Product** or **Standard Focus Product**). Select **All** to display all items in the currently valid product detailing definitions (of all types) where the business area is the same as your own and where the specialization (if available) matches that of the person the activity is linked to. Click on **Overview** to display an overview of the entered items.
4. Enter the desired data.
5. Save.

A product detailing record and product detailing item record is added for each of the items you have entered, >> on page 210.

Editing Product Detailing Records

To display and edit product detailing and product detailing item records:

1. Switch to the desired activity.
2. Select **Go to All Related > All Product Detailings** from the context menu.
The product detailing records added for the activity are displayed.
3. Switch to the desired record.
The product detailing item records are displayed and can be edited.

13

Listing

Listing

Learn how to use the Listing info area to store the items listed for a company.

You can also include information that shelf space has been allotted at a specific spot and has been paid for.

The listing is a kind of "contract" at the item level: If a company is paid e. g. for placing an article at a specific spot in a supermarket shelf for a specific period, add a listing to document this information.

The following functions are available:

- Listings can be used in the quick add area for POS monitoring items (you can display facings, prices and placements).
- Listings need not be entered for each outlet, but can be inherited from a parent company or wholesaler.
- You can define a time period that the listing is valid for.
- You can list the same item more than once (e.g. lasagne in the noodles and the Italian specialties sections of a store).

Adding Listings

You can add any number of listing for an item/item group and company, e.g. if the same item is placed on various shelves. The validity periods can overlap.

To add a listing:

1. Switch to the company you want to add the listing for.
2. Select **Go to All Related > All Listings** from the context menu.
3. Click on **⊕ (New)**.
4. Select the item from the **Item name** field. If you want to add a listing for an product group, enter the **Sector, Product Group, Brand and Grade**.
5. To display the item/product group in the quick add area, enter dates in the **Valid from** and **Valid to** fields. If you do not enter a date in the **Valid from** field, the listing is valid without a start date (i.e. it also applies to the past).
6. Enter the **Branch type** to determine that a listing applies to a specific type of branch (small outlet, flagship store etc.). If you do not enter a **Branch type**, the

listing applies to the current company and all companies that inherit the listing from the current company.

7. Enter information on the items placement in the **Facings, Placing** and **Price** fields.

Listings for Product Groups

If you want to list all items in a product group for a company, enter the **Product Group** and leave the remaining fields empty.

A combination of criteria (e.g. all items in the "noodles" product group in the sector "own products") is not possible in listing records. However, you can add multiple listings per company, each with different criteria (e.g. one listing for "noodles" another listing for "own products").

When inheriting listings, the first listing found in the following order is used:

1. A listing containing the **Item No.**
2. A listing containing the **Grade**
3. A listing containing the **Brand**
4. A listing containing the **Product Group**
5. A listing containing the **Sector**

Inheriting Listings

Listings can be entered at all levels of a company hierarchy and can then be inherited by individual outlets. Listings added for several companies can be inherited, e.g. branches can inherit listings from the parent company.

There are two types of inheritance:

- Using external keys
- Using the relationship hierarchy


The various types of inheritance are defined by your administrator in the [Configuration](#) info area, see *CRM.core Administrator Guide*.

Inheriting Listings via External Keys

Listings can be inherited by companies using external keys.

In this example, the company "RanComp 3" should inherit the listing defined for "RanComp 2".

1. Enter an external key in the "RanComp2" company: external key = "234" and external system = "RA".

 Company	C...	External Key	Ext. System	Listing Reference (Company)
RanComp 1	Wien	123	RA	
RanComp 2	Wien	234	RA	123
RanCamp 3	Wien			234

Note: Note: Your administrator needs to define the contents of the **Ext. System** field (in this example "RA") that is used to inherit the listing in the **Configuration** info area (**Listing** category, **External System** option).

2. Enter the external key ("234") of "RanComp 2" in the **Listing Reference (Company)** field of "RanComp 3".

If a listing is available for "RanComp 3", that listing is used. If no listing is available, the system searches for a company with the corresponding external company key (the **Ext. System** defined in the **Configuration** info area and the **Ext. Key** entered in the **Listing Reference (Company)** field of "RanComp 3"). If a listing is defined for "RanComp 2" that listing is used.

Note: Note: As the external company key is unique across the whole system, a company can only inherit listings from one other company. The company from which the listing is inherited can however itself inherit a listing from another company. The system continues to search for a listing in the hierarchy until one is found. In our example, RanComp 2 inherits the listings of RanComp 1. If no listing is entered for either RanComp 3 or RanComp 2, but a listing is entered for RanComp 1, RanComp 3 also inherits the listing from RanComp 1.

Inheriting Listings via Relationship Hierarchy

Listings are generally not added for individual outlets, but for the headquarters or a wholesaler or similar. The link between an outlet and the headquarters is established by means of relationships.

Listings can be inherited by outlets as follows:

- When adding item records manually:

When adding items manually, only listings defined for POS monitoring items are relevant.

If a valid listing is found for an item added for a company, the POS monitoring item record is linked to the listing. The first listing that matches the item is used; the system searches for a matching listing record in the following order: matching item, grade, brand, product group or sector.

If no listing is found for a company, the system searches for a listing at the next highest level of the hierarchy defined in the **Configuration** info area (**Listing** category, **Inheritance** option; one or more relationship types must to be entered in the **Value** field of the configuration entry). The first matching listing that is found is used. For example, if the company has several wholesalers, the first listing found for a wholesaler is used. The other wholesalers are ignored.

- In the quick add area:

If your administrator has configured the quick add area for inheriting listings (**Configuration** info area, **Listing** category, **Inheritance - Quick Add** option; one or more relationship types need to be entered in the **Value** field), the **Inheritance** drop-down list is available in the quick add areas (**Offer** (Aurea CRM win only), **Order**, **POS Monitoring**, **Refunding** (Aurea CRM win only)).

You can select the desired relationship type in the field below the filters in the quick add areas.

If multiple listings are present for an item for a company, the item is displayed multiple times in the quick add area for the POS; only the first listing is displayed in the quick add area for orders (in the following order: item, grade, brand, product group, sector).

Note: Note: As reciprocal relationships are also taken into account, the reciprocal relationships must be defined using a different relationship type in order to define a hierarchic structure used to inherit listings.

You can restrict the inheritance of listings using the **Branch type** field in the **Listing** info area. Only those listings where no branch type is entered or where the same branch type as the company is entered are inherited. If a suitable listing with the branch type entered and a listing with an empty branch type are found, the listing with the branch type entered is used.

Adding Listings

You can add any number of listing for an item/item group and company, e.g. if the same item is placed on various shelves. The validity periods can overlap.

To add a listing:

1. Switch to the company you want to add the listing for.
2. Select **Go to All Related > All Listings** from the context menu.
3. Click on **⊕ (New)**.
4. Select the item from the **Item name** field.

If you want to add a listing for an product group, enter the **Sector**, **Product Group**, **Brand** and **Grade**, >> on page 211.

5. To display the item/product group in the quick add area (>> on page 104):
 - Enter dates in the **Valid from** and **Valid to** fields. If you do not enter a date in the **Valid from** field, the listing is valid without a start date (i.e. it also applies to the past).
6. Enter the **Branch type** to determine that a listing applies to a specific type of branch (small outlet, flagship store etc.). If you do not enter a **Branch type**, the listing applies to the current company and all companies that inherit the listing from the current company, >> on page 212.
7. Enter information on the items placement in the **Facings**, **Placing** and **Price** fields.

Listings for Product Groups

If you want to list all items in a product group for a company, enter the **Product Group** and leave the remaining fields empty.

A combination of criteria (e.g. all items in the "noodles" product group in the sector "own products") is not possible in listing records. However, you can add multiple listings per company, each with different criteria (e.g. one listing for "noodles" and another listing for "own products").

When inheriting listings, the first listing found in the following order is used:

1. A listing containing the **Item No.**
2. A listing containing the **Grade**
3. A listing containing the **Brand**
4. A listing containing the **Product Group**
5. A listing containing the **Sector**

Inheriting Listings

Listings can be entered at all levels of a company hierarchy and can then be inherited by individual outlets. Listings added for several companies can be inherited, e.g. branches can inherit listings from the parent company.

There are two types of inheritance:

- Using external keys
- Using the relationship hierarchy


The various types of inheritance are defined by your administrator in the **Configuration** info area, >> CRM.core Administrator Guide.

Inheriting Listings via External Keys

Listings can be inherited by companies using external keys.

In this example, the company "RanComp 3" should inherit the listing defined for "RanComp 2".

1. Enter an external key in the "RanComp2" company: external key = "234" and external system = "RA".

 Company	C...	External Key	Ext. System	Listing Reference (Company)
RanComp 1	Wien	123	RA	
RanComp 2	Wien	234	RA	123
RanComp 3	Wien			234

Note: Note: Your administrator needs to define the contents of the **Ext. System** field (in this example "RA") that is used to inherit the listing in the **Configuration** info area (**Listing** category, **External System** option).

2. Enter the external key ("234") of "RanComp 2" in the **Listing Reference (Company)** field of "RanComp 3".

If a listing is available for "RanComp 3", that listing is used. If no listing is available, the system searches for a company with the corresponding external company key (the **Ext. System** defined in the **Configuration** info area and the **Ext. Key** entered in the **Listing Reference (Company)** field of "RanComp 3"). If a listing is defined for "RanComp 2" that listing is used.

Note: Note: As the external company key is unique across the whole system, a company can only inherit listings from one other company. The company from which the listing is inherited can however itself inherit a listing from another company. The system continues to search for a listing in the hierarchy until one is found. In our example, RanComp 2 inherits the listings of RanComp 1. If no listing is entered for either RanComp 3 or RanComp 2, but a listing is entered for RanComp 1, RanComp 3 also inherits the listing from RanComp 1.

Inheriting Listings via Relationship Hierarchy

Listings are generally not added for individual outlets, but for the headquarters or a wholesaler or similar. The link between an outlet and the headquarters is established by means of relationships.

Listings can be inherited by outlets as follows:

- When adding item records manually:

When adding items manually, only listings defined for POS monitoring items are relevant.

If a valid listing is found for an item added for a company, the POS monitoring item record is linked to the listing. The first listing that matches the item is used; the system searches for a matching listing record in the following order: matching item, grade, brand, product group or sector.

If no listing is found for a company, the system searches for a listing at the next highest level of the hierarchy defined in the **Configuration** info area (**Listing** category, **Inheritance** option; one or more relationship types must to be entered in the **Value** field of the configuration entry). The first matching listing that is found is used. For example, if the company has several wholesalers, the first listing found for a wholesaler is used. The other wholesalers are ignored.

- In the quick add area:

If your administrator has configured the quick add area for inheriting listings (**Configuration** info area, **Listing** category, **Inheritance - Quick Add** option; one or more relationship types need to be entered in the **Value** field), the **Inheritance** drop-down list is available in the quick add areas (**Offer** (Aurea CRM win only), **Order**, **POS Monitoring**, **Refunding** (Aurea CRM win only)).

You can select the desired relationship type in the field below the filters in the quick add areas.

If multiple listings are present for an item for a company, the item is displayed multiple times in the quick add area for the POS; only the first listing is displayed in the quick add area for orders (in the following order: item, grade, brand, product group, sector).

Note: Note: As reciprocal relationships are also taken into account, the reciprocal relationships must be defined using a different relationship type in order to define a hierarchic structure used to inherit listings.


You can restrict the inheritance of listings using the **Branch type** field in the **Listing** info area. Only those listings where no branch type is entered or where the same branch type as the company is entered are inherited. If a suitable listing with the branch type entered and a listing with an empty branch type are found, the listing with the branch type entered is used.

Inheriting Listings via External Keys

Listings can be inherited by companies using external keys.

In this example, the company "RanComp 3" should inherit the listing defined for "RanComp 2".

1. Enter an external key in the "RanComp2" company: external key = "234" and external system = "RA".

 Company	C...	External Key	Ext. System	Listing Reference (Company)
RanComp 1	Wien	123	RA	
RanComp 2	Wien	234	RA	123
RanComp 3	Wien			234

Note: Note: Your administrator needs to define the contents of the **Ext. System** field (in this example "RA") that is used to inherit the listing in the **Configuration** info area (**Listing** category, **External System** option).

2. Enter the external key ("234") of "RanComp 2" in the **Listing Reference (Company)** field of "RanComp 3".

If a listing is available for "RanComp 3", that listing is used. If no listing is available, the system searches for a company with the corresponding external company key (the **Ext. System** defined in the **Configuration** info area and the **Ext. Key** entered in the **Listing Reference (Company)** field of "RanComp 3"). If a listing is defined for "RanComp 2" that listing is used.

Note: Note: As the external company key is unique across the whole system, a company can only inherit listings from one other company. The company from which the listing is inherited can however itself inherit a listing from another company. The system continues to search for a listing in the hierarchy until one is found. In our example, RanComp 2 inherits the listings of RanComp 1. If no listing is entered for either RanComp 3 or RanComp 2, but a listing is entered for RanComp 1, RanComp 3 also inherits the listing from RanComp 1.

Inheriting Listings via Relationship Hierarchy

Listings are generally not added for individual outlets, but for the headquarters or a wholesaler or similar. The link between an outlet and the headquarters is established by means of relationships, >> on page 120.

Listings can be inherited by outlets as follows:

- When adding item records manually:

When adding items manually, only listings defined for POS monitoring items are relevant.

If a valid listing is found for an item added for a company, the POS monitoring item record is linked to the listing. The first listing that matches the item is used; the system searches for a matching listing record in the following order: matching item, grade, brand, product group or sector, >> on page 211.

If no listing is found for a company, the system searches for a listing at the next highest level of the hierarchy defined in the **Configuration** info area (**Listing** category, **Inheritance** option; one or more relationship types must to be entered in the **Value** field of the configuration entry). The first matching listing that is found is used. For example, if the company has several wholesalers, the first listing found for a wholesaler is used. The other wholesalers are ignored.

- In the quick add area:

If your administrator has configured the quick add area for inheriting listings (**Configuration** info area, **Listing** category, **Inheritance - Quick Add** option; one or more relationship types need to be entered in the **Value** field), the **Inheritance** drop-down list is available in the quick add areas (**Offer** (Aurea CRM win only), **Order**, **POS Monitoring**, **Refunding** (Aurea CRM win only)).

You can select the desired relationship type in the field below the filters in the quick add areas.

If multiple listings are present for an item for a company, the item is displayed multiple times in the quick add area for the POS; only the first listing is displayed in the quick add area for orders (in the following order: item, grade, brand, product group, sector).

Note: Note: As reciprocal relationships are also taken into account, the reciprocal relationships must be defined using a different relationship type in order to define a hierarchic structure used to inherit listings.

You can restrict the inheritance of listings using the **Branch type** field in the **Listing** info area. Only those listings where no branch type is entered or where the same branch type as the company is entered are inherited. If a suitable listing with the branch type entered and a listing with an empty branch type are found, the listing with the branch type entered is used.

14

Point of Sale


Point of Sale


Learn about POS info area.

Aurea CRM allows you to store the facings of your own products (POS Monitoring info area) and those of your competitors (**Competition** info area) at your customers, as well as analyze the points of sale per rep and item.

POS Monitoring

The **POS Monitoring** info area (POS = point of sale) is used to store facings for your own products at the point of sale on a specific date. You can store various information on your business partners. Points of sale monitoring records are always added for a company. You can add one POS monitoring record per company per day.

 **POS Monitoring 08.03.2013**

Menu | Edit | Save | Cancel |  ▼

Date	08.03.2013	Rep ID	Chris Aki
SAP Company Code		Sales Org.(C)	
Sales Channel (C)		Division(C)	
Currency	Euro	Contact Person	Simon Eder
Text			

To add a POS monitoring record:

1. The following options are available:

- Switch to the desired company and select **New > New POS Monitoring** from the context menu.



- Select **(Products & Service) > POS Monitoring**. Start the search. Click on **+** (**New**) and select the desired company.

2. Enter the following:

- **Currency:** The currency cannot be edited once the record has been saved. POS monitoring items use the currency entered in the POS monitoring record. The currency cannot be changed in the items.
- **Date** of the POS monitoring.

POS Monitoring Items

You can add multiple POS monitoring items to a POS monitoring record in order to store the facings at a customer at the item level. You can store stock situations, facing situations and the distribution status, so as to identify weak points and to take necessary measures.

Item IND 60mg

Menu | Edit | Save | Cancel | File

POS Item No. 1

Item No. 10088

Item name IND 60mg

Sector Own Product

Brand Indramal

Producer No.

Item Master IND 60mg

Prod.Cat. Cardio-vascular

Grade Tablet

Brand No.

POS Monitoring

Value

LIV Stock In

Stock

Distr. Cat.

Number Of Packs

Facings

Placing

LIV Stock Out

Out Of stock

Distr.

Insertion Qty.

Facing %

Plac.Text

You can either add POS monitoring items directly or select **Quick Add (Items)** from the POS monitoring record's context menu to use the quick add function.

To add items to a POS monitoring record:

1. The following options are available:
 - Switch to the desired POS monitoring record and select **POS Monitoring Items** from the context menu. Start the search and click on **⊕ (New)**.
 - Switch to the desired company. Select **Go to All Related > All POS Monitorings** from the context menu. Switch to the desired POS monitoring record and select **POS Monitoring Items** from the context menu. Start the search and click on **⊕ (New)**.
2. Select an item from the **Item No.** field. The **Item name, Sector, Product Group, Brand and Grade** are entered automatically.
3. Enter date on the various tabs, such as the **Stock, Facings, Price** etc. The **Currency** is transferred from the POS monitoring record and cannot be changed.

Switch to the desired POS monitoring record and select **Quick Add (Items)** from the context menu to use the quick add function.

Note: Note:The **Last POS Monitoring** button displays the items in the last three POS monitoring records added for the selected company. The filter accessed by this button can be configured using the

`recentFilterOptions`

parameter, see [CRM.core Administrator Guide](#). If you select the **Listing** filter, you can select a relationship type in the field directly beneath the filters. If an item is defined in a listing multiple times, it is listed multiple times. If you select the **Special Offer** filter, the items defined for the valid special offer are displayed.

Transferring Individual Fields from Listings

You can transfer information stored in listings when adding POS monitoring data in the quick add area.


The following fields are transferred from the **Listing** info area to the following fields in the **POS Monitoring Item** info area:

Listing Field	POS Monitoring Item Field
LS-StaNo	LS_StaNo
LS-SerNo	LS_SerNo
Facings	Agreed Facings and LS-Facings
Facing %	Agreed Facings (%) and LS-Facing %
Placing	Agreed Placement 1 and LS-Placing 1
Placing 2	Agreed Placement 2 and LS-Placing 2

Listing Field	POS Monitoring Item Field
Price	Agreed Price and LS-Price
Plac.Text	LS-Plac.Text

The value in the **Price** field in the **Listing** info area is transferred to the **LS-Price** and **Agreed Price** fields in the **POS Monitoring Item** info area. The amount is converted to the currency entered in the **POS Monitoring** info area. An exchange rate needs to be defined for the currency to be converted.

POS Monitoring

 **POS Monitoring 08.03.2013**

Menu | Edit | Save | Cancel | Print

Date 08.03.2013	Rep ID <u>Chris Aki</u>
SAP Company Code	Sales Org.(C)
Sales Channel (C)	Division(C)
Currency Euro	Contact Person Simon Eder
Text	

The **POS Monitoring** info area (POS = point of sale) is used to store facings for your own products at the point of sale on a specific date. You can store various information on your business partners. Points of sale monitoring records are always added for a company. You can add one POS monitoring record per company per day.

To add a POS monitoring record:

1. The following options are available:

- Switch to the desired company and select **New > New POS Monitoring** from the context menu.



- Select **(Products & Service) > POS Monitoring**. Start the search. Click on **+** (**New**) and select the desired company.

2. Enter the following:

- **Currency:** The currency cannot be edited once the record has been saved. POS monitoring items use the currency entered in the POS monitoring record. The currency cannot be changed in the items.
- **Date** of the POS monitoring.

POS Monitoring Items

Item IND 60mg

Menu | Edit | Save | Cancel | Print

POS Item No. 1 Item No. 10088 Item name IND 60mg Sector Own Product Brand Indramal Producer No.	Item Master <u>IND 60mg</u> Prod.Cat. Cardio-vascular Grade Tablet Brand No.
--	---

POS Monitoring | Value

LIV Stock In Stock Distr. Cat. Number Of Packs Facings Placing	LIV Stock Out Out Of stock <input checked="" type="checkbox"/> Distr. <input type="checkbox"/> Insertion Qty. Facing % <input style="width: 100%;" type="text"/> Plac.Text
---	---

You can add multiple POS monitoring items to a POS monitoring record in order to store the facings at a customer at the item level. You can store stock situations, facing situations and the distribution status, so as to identify weak points and to take necessary measures.

You can either add POS monitoring items directly or select **Quick Add (Items)** from the POS monitoring record's context menu to use the quick add function, >> on page 104.

To add items to a POS monitoring record:

1. The following options are available:
 - Switch to the desired POS monitoring record and select **POS Monitoring Items** from the context menu. Start the search and click on **⊕ (New)**.
 - Switch to the desired company. Select **Go to All Related > All POS Monitorings** from the context menu. Switch to the desired POS monitoring record and select **POS Monitoring Items** from the context menu. Start the search and click on **⊕ (New)**.
2. Select an item from the **Item No.** field. The **Item name**, **Sector**, **Product Group**, **Brand** and **Grade** are entered automatically.
3. Enter date on the various tabs, such as the **Stock**, **Facings**, **Price** etc. The **Currency** is transferred from the POS monitoring record and cannot be changed.

Switch to the desired POS monitoring record and select **Quick Add (Items)** from the context menu to use the quick add function.

Note: Note:The **Last POS Monitoring** button displays the items in the last three POS monitoring records added for the selected company. The filter accessed by this button can be configured using the

`recentFilterOptions`

parameter, >> CRM.core Administrator Guide. If you select the **Listing** filter, you can select a relationship type in the field directly beneath the filters, >> on page 212. If an item is defined in a listing multiple times, it is listed multiple times, >> on page 211. If you select the **Special Offer** filter, the items defined for the valid special offer are displayed, >> on page 227 and on page 229.

Transferring Individual Fields from Listings

You can transfer information stored in listings when adding POS monitoring data in the quick add area, >> on page 211.

The following fields are transferred from the **Listing** info area to the following fields in the **POS Monitoring Item** info area:

Listing Field	POS Monitoring Item Field
LS-StaNo	LS_StaNo
LS-SerNo	LS_SerNo
Facings	Agreed Facings and LS-Facings
Facing %	Agreed Facings (%) and LS-Facing %
Placing	Agreed Placement 1 and LS-Placing 1
Placing 2	Agreed Placement 2 and LS-Placing 2
Price	Agreed Price and LS-Price
Plac.Text	LS-Plac.Text

The value in the **Price** field in the **Listing** info area is transferred to the **LS-Price** and **Agreed Price** fields in the **POS Monitoring Item** info area. The amount is converted to the currency entered in the **POS Monitoring** info area. An exchange rate needs to be defined for the currency to be converted, >> on page 171.

15

Promotional Material

Promotional Material

Learn how to store information on promotional material for a company.

You can define how much the customer needs to be paid in order for the promotional material to be displayed.

Free Sample IND 40mg

Menu | Edit | Save | Cancel | [Icon]

Item No. 11001
Item name IND 40mg
Sector Own Product
Brand Indramal
Lot No.
Prod.Cat. Cardio-vascular
Grade Tablet
Contract

Info | Text

Date 30.11.2012
Rep ID [Kazuko Kanzaki](#)
Quantity
Unit
Contact Person
Status
Stock
Packaging Unit
Currency

In contrast to offers, orders and refunds, promotional material records are only stored as items; there is no parent "header" record. Always enter the **number of individual units** in the **Quantity** field, not the number of packages. There is no quantity factor. Enable the **Entered in Inventory** field to prevent the quantity entered from being deducted from the **Stock**. The field is disabled by default, i.e. stocks are decreased.

You can enter promotional material directly or using the quick add function (**Quick Add (Promotional Material)**).

To add promotional material individually:

1. Switch to the desired company and select **New > Promotional Material** from the context menu.
2. Enter data such as the **Item No.**, **Quantity**, **Currency**, **Placing** etc.
3. Save.

To display all promotional material entered for a company, switch to the desired company and select **Go to All Related > All Promotional Materials** from the context menu.

Note: You can determine that promotional material can also be distributed to persons (**PE_StaNo**, **PE_SerNo** and **Person**).

16

Samples

Samples

Learn how to manage the distribution of samples by your field staff.

Sample management is important for pharmaceutical products and encompasses the following features:

- You can define that certain persons are **not subject to quotas**, i.e they may receive any number of samples of any item.
- You can define the launch phase per item and business area and determine how many samples (i.e. the quota) may be distributed during and after the launch phase. The end of the launch phase is the latest end date in all an item's sample codes.
- Use the **Sample** info area to store how many samples of an item have been **issued** to a person and how many still need to be **sent**. The quick add function is available for entering samples.

Note: You can access the quick add area for samples from the **Activity** info area. The samples entered there are linked to the activity record.

- When entering samples, Aurea CRM automatically **verifies whether the available quota is exceeded**.
- Use the **Stock** field (in the **Sample** info area) to determine which stocks the samples should be deducted from. When reps issue samples, the corresponding rep's stock is decreased by the quantity entered in the **Quantity issued** field.
- You can display an overview of all samples you have issued to a person over the course of a year in the **Samples/Year** info area. You can display a list of all samples issued and still to be sent in the **Sample** info area.

Note: (European Federation of Pharmaceutical Industries and Associations/Healthcare Professionals): You can configure the distribution of samples such that it corresponds to Article 16 of the EFPIA HCP Code. Use the **Quota after initial distribution** configuration entry (**Sample** category) to do so. Enter

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as the **Value** to determine that two samples per year may be distributed to a person (doctor) over the two years from the date that the first samples were issued. If this quota is exceeded, a message is displayed. The setting defined in the **Quota exceeded** configuration entry (**Sample** category) determine whether the record can be saved in this case. If a sample is added after the two year period has ended, a message is displayed and the record cannot be saved. If the sample is not subject to a quota, the sample can be issued without a message being displayed, and further samples can be issued and stored in the system after the two year period has ended. If you use the **Quota after initial distribution** configuration entry, the **Date-based quota** configuration entry is ignored and the default sample-related business logic is not applied (sample codes). If you change the value in the configuration entry, remaining quotas based on previously issued samples are not recalculated. In order to be able to check how many samples a person has already received, the access rights defined for the **Sample/Year** info area are ignored by the business logic.

Persons not Subject to Quotas

You can define categories of persons that are not subject to quotas. These persons can receive any number of samples during and after the launch phase, irrespective of whether a sample code is entered in the item.

Follow the below steps to define categories of persons that are not subject to quotas:

1. Define the categories for persons not subject to quotas in the **Category** info area in Aurea CRM web, and enable the **No sample limit** check box. Alternatively, you can enable the **No sample limit** field for individual persons.
2. Enter the desired **Category** in the appropriate person records in Aurea CRM web (on the **Classification** tab).

The **No sample limit** field in the Person info area only affects the corresponding person, irrespective of their category. The **No sample limit** field in the **Category** info area affects all persons assigned to the category.

The screenshot displays the 'Category' configuration form in Aurea CRM. The form is set against a light gray background with a white border. At the top, there is an orange header bar containing navigation icons and the text 'Sorted by: (1) Category View'. The form fields are as follows:

- Category:** A text input field containing the value 'Tester'.
- No sample limit:** A checkbox that is checked, indicated by a small black checkmark.
- Created on:** A date input field containing the value '14/12/2012'.
- Updated on:** An empty date input field.

Entering Sample Quotas for Items

Use the **Sample Code** info area to define the following per item and business area:

- Whether samples of this item are subject to a quota
- The duration of the launch phase: The end of the launch phase is the latest end date in all an item's sample codes.
- The number of samples that may be distributed per person before and during the launch phase

Sample Codes

Use the **Sample Code** info area to define the launch phase and the amount of samples that can be distributed per person during and after this phase, and whether the item is subject to a quota.

The settings apply to all reps assigned to the corresponding business area.

To define an item as a sample:

1. Switch to the desired item in the **Item Master** info area.
2. Select **New > New Sample Code** from the context menu.

The screenshot shows the 'Sample Code OTC' form. The title bar is 'Sample Code OTC'. The menu bar contains 'Menu', 'Edit', 'Save', 'Cancel', and a dropdown arrow. The form fields are:

- Item No. 11001
- Item name IND 40mg
- Business Area OTC
- Allocated
- Launch start
- Launch end
- Units during launch
- Units after launch

3. Enter the desired **Business Area**.
4. Enter the following details:
 - If the **Allocated** field is **disabled**, there are no restrictions imposed on the number of items that can be distributed to persons as samples. ('*' is displayed for these items in the **Available Quota** column in the quick add area.)
 - Enable the **Allocated** field to determine that the item is subject to a quota. Use the remaining fields in the info area to determine the quota and duration of the launch phase.
 - **Launch start:** Start of the launch phase
 - **Launch end:** End of the launch phase
 - **Units during launch:** Quota that can be issued per person and year during the launch phase.

- **Units after launch:** Quota that can be issued per person and year after the launch phase.
- The quotas defined here (**Units during launch** and **Units after launch**) are compared to the sum total in the **Samples/Year** info area when issuing samples.

Note: Note: Define a configuration entry in Aurea CRM win using the **Date-based quota** option (**Sample** category) to determine that quotas are calculated from the end of the launch phase rather than using the calendar year, see [CRM.core Administrator Guide](#).

5. Save. You can define different introductory phases and quotas for each business area.

Price lists × Sample Code ×

« < 1 - 2 of 2 > »

Item No.	Item Name	Business Area	Type
11001	IND 40mg	OTC	
11001	IND 40mg	Pharma	

When entering samples, the system checks the number of items currently available (based on the current date) to be distributed as samples based on the information in the **Sample Code** and **Samples/Year** info areas.

Note: Note: If the **No sample limit** field is enabled for a person (or the person is assigned to an appropriate category), the person can receive an unlimited number of samples of each item, irrespective of whether a quota is defined for the item.

Issuing and Sending Samples

You can enter the samples you have issued or still need to send either directly or using the quick add function, see [Quick Add](#) on page 199.

To add a sample directly:

1. Switch to the desired person and select **New > New Sample** from the context menu.
2. Enter **Date** and **Business Area** and click on **Next**.
3. Select the item.

Samples IND 40mg

Menu | Edit | Save | Cancel | [Print Icon]

Date 16.09.2013 Rep ID Stephen Smith

Business Area OTC Status

Item No. 11001

Item name IND 40mg

Available Quota * Lot No.

Product

Sector Own Product Prod.Cat. Cardio-vascular

Brand Indramal Grade Tablet

Quantity issued Order quantity

Price Currency

In order to be able to enter an item as a sample, the following conditions need to be met:

- The current date must be either during or after the launch phase (except for items that are not subject to quotas).
4. Enter the number of units issued as samples in the **Quantity issued** field and the amount that you still need to send in the **Order quantity** field.
 5. Enter additional data such as the **Lot No.**, **Status** etc. You are automatically entered in the **Rep ID** field.
 6. Save.

Note: You can access the **quick add** function for samples from an activity. In this case, information is automatically transferred from the activity to the sample record (**Date**, **Rep ID**, **Business Area**, **MA_StaNo**, **MA_SerNo**). When using the quick add function, a sample code needs to be defined for the rep's **Business Area**. You can define which items should be displayed in the quick add area, see [Serial Entry Configurations \(OTC\)](#) in the *Aurea CRM web Administrator Guide*. The **Lot No.** and current quantity are displayed in the quick add area. Use the **Lots without quantity** configuration entry (**Inventory** category) to only display the lot number, see [CRM.core Administrator Guide](#) and [Aurea CRM web Administrator Guide](#). Click on the **Special Offer** button in the quick add area to only display samples for currently valid special offers; the key fields entered in the special offer are transferred to any items added in the quick add area.

Issued Samples and Samples to be Sent

You can enter the following for each sample:

Field	Explanation
Stock	Determines the stock that the samples are deducted from. The quantity in the Stock info area is automatically decreased by the amount entered in the Quantity issued field.
Quantity issued	Enter the number of samples that have been issued to the person here. Enter negative numbers to determine that the quantity entered in this field is added to the stock (if samples are returned).
Order quantity	Enter the number of samples that still need to be sent to this person here. Quantities entered in the Order quantity field are ignored in stock calculations, as these samples are generally sent out directly from central stores and therefore have no influence on a rep's stocks.
Status	If you have entered data in the Order quantity field, this field is set to "Ordered".

The available quota is calculated based on the values in the **Quantity issued** and **Order quantity** fields.

Available Quota

Aurea CRM allows you to monitor the amount of samples (of an item) a person has received and the amount they can still receive.

The currently available quota (i.e. the number of units of an item that a person can still receive) is determined per item and customer based on information stored in various info areas:

Info Area	Field	Explanation
Person	No sample limit	If this field is enabled for a person (or the person is assigned to an appropriate category where No sample limit is enabled), the person can receive an unlimited number of samples of each item.
Sample Code	Allocated	If this field is disabled all persons can receive an unlimited quantity of this item as samples.
Sample Code	Launch start Launch end	Start and end date of the launch phase for the item. By default, the available quota for an item is calculated for a calendar year. For information on date-based quotas.
Sample Code	Units during launch Units after launch	Maximum number of units of this item that a person can receive during and after the introductory phase.

When entering samples, the system checks the date entered in the **Sample** info area to determine whether the launch phase has started or ended. The maximum available quota is calculated based on the data in the **Sample Code** info area. The currently available quota is calculated from this upper limit and the number of samples already issued to the person this current year.

The available quota is updated in the **Available Quota** field in the quick add area or when adding or editing a sample record once a new entry is made in the **Quantity issued** and **Order quantity** fields. If a person or sample item is not subject to a quota, '*' is displayed in the **Available Quota** field.

Note: If the available quota is exceeded, the record cannot be added. Your administrator can define that records can still be added if the available quota is exceeded using the **Quota exceeded** option (**Sample** category) in the **Configuration** info area, see [CRM.core Administrator Guide](#). In this case, a warning message is displayed if the quota is exceeded.

Date-based Quotas

By default, the available quota for an item is calculated for a calendar year. The quota defined in the **Units after launch** field applies to the end of the calendar year following the launch phase.

Your administrator can use the **Date-based quota** configuration entry (**Sample** category) to define that the quota applies for a full year after the last launch end date defined for the item, instead of until the end of the calendar year, see [CRM.core Administrator Guide](#).

If you are using date-based quotas, the quota is calculated per item based on the **End of Period** entered in the sample code record. This is the latest **Launch end** date + 1 year.

The available quota is calculated based on the currently valid record in the **Samples/Year** info area (i.e. **End of Period** > date the sample was issued). If no such record exists, it is added automatically. The number of samples issued is calculated when adding the new record.

Overview

Aurea CRM allows you to display an overview of the samples issued to a customer during and after the launch phase, as well as an overview of any samples that still need to be sent.

Samples/Year

The **Samples/Year** info area provides you with an overview of the samples issued to a customer during and after the launch phase.

- Select  (**Sales**) > **Search Samples/Year**.

The current number of samples issued per person, item and sample period is displayed:

When issuing samples, Aurea CRM calculates the available quota based on the number of samples that have been issued or still need to be sent.

Samples



Select **(Sales) > Samples** and click on search to list all samples that have been issued or that still need to be sent. Use the context menu to switch to the company, person or activity that a sample belongs to.

Search Results

Date	Rep ID	Business Area	Ite...	Item name	Q...	O...	A...
01.03.20...	Chris Aki	OTC	1844	IND 10mg			
			11001	IND 40mg			
		ma	232323	Werbekarton Indramal			
			80300	Werbekarton Tramulys		3	
				Werbekarton Tramulys	4	3	
18.12.20...	Kazuko Kanzaki	OT		Werbekarton Tramulys	5	5	
07.01.20...	Chris Aki	OT		Werbekarton Tramulys	8		
08.01.20...	Chris Aki	OTC	80300	Werbekarton Tramulys	9		
09.01.20...	Kazuko Kanzaki	OTC	80300	Werbekarton Tramulys	45		
26.02.20...	Kazuko Kanzaki	OTC	80300	Werbekarton Tramulys	5		

Persons not Subject to Quotas

Aurea CRM allows you to define categories of persons that are not subject to quotas. These persons can receive any number of samples during and after the launch phase, irrespective of whether a sample code is entered in the item.

Define the categories for persons not subject to quotas in the **Category** info area in Aurea CRM win, and enable the **No sample limit** check box.

The screenshot shows the 'Category' info area in Aurea CRM. The 'Category' field is set to 'Tester'. The 'No sample limit' checkbox is checked. Below the form, the 'Created on' date is 14/12/2012 and the 'Updated on' field is empty. The top of the screenshot shows the 'Category' header and navigation icons.

Alternatively, you can enable the **No sample limit** field for individual persons.

Enter the desired **Category** in the appropriate person records in Aurea CRM web (on the **Classification** tab).

The **No sample limit** field in the Person info area only affects the corresponding person, irrespective of their category. The **No sample limit** field in the **Category** info area affects all persons assigned to the category.

Entering Sample Quotas for Items

Use the **Sample Code** info area to define the following per item and business area:

- Whether samples of this item are subject to a quota
- The duration of the launch phase: The end of the launch phase is the latest end date in all an item's sample codes.
- The number of samples that may be distributed per person before and during the launch phase

Sample Codes

Use the **Sample Code** info area to define the launch phase and the amount of samples that can be distributed per person during and after this phase, and whether the item is subject to a quota.

The settings apply to all reps assigned to the corresponding business area.

To define an item as a sample:

1. Switch to the desired item in the **Item Master** info area, >> on page 175.
2. Select **New > New Sample Code** from the context menu.

Sample Code OTC

Menu | Edit | Save | Cancel | [Dropdown]

Item No. 11001

Item name IND 40mg

Business Area OTC Type

Allocated

Launch start Launch end

Units during launch Units after launch

3. Enter the desired **Business Area**.

4. Enter the following details:

- If the **Allocated** field is **disabled**, there are no restrictions imposed on the number of items that can be distributed to persons as samples. ('*' is displayed for these items in the **Available Quota** column in the quick add area.)
- Enable the **Allocated** field to determine that the item is subject to a quota. Use the remaining fields in the info area to determine the quota and duration of the launch phase.
 - **Launch start:** Start of the launch phase
 - **Launch end:** End of the launch phase
 - **Units during launch:** Quota that can be issued per person and year during the launch phase.
 - **Units after launch:** Quota that can be issued per person and year after the launch phase.
- The quotas defined here (**Units during launch** and **Units after launch**) are compared to the sum total in the **Samples/Year** info area when issuing samples, >> on page 225.


Note: Note: Define a configuration entry in Aurea CRM win using the **Date-based quota** option (**Sample** category) to determine that quotas are calculated from the end of the launch phase rather than using the calendar year, >> CRM.core Administrator Guide and on page 225.

5. Save.

You can define different introductory phases and quotas for each business area.

Price lists × Sample Code ×

« < 1 - 2 of 2 > »»

	Item No.	Item Name	Business Area	Typ
	11001	IND 40mg	OTC	
	11001	IND 40mg	Pharma	

When entering samples, the system checks the number of items currently available (based on the current date) to be distributed as samples based on the information in the **Sample Code** and **Samples/Year** info areas, >> on page 224.

Note: Note: If the **No sample limit** field is enabled for a person (or the person is assigned to an appropriate category), the person can receive an unlimited number of samples of each item, irrespective of whether a quota is defined for the item, >> on page 222.

Issuing and Sending Samples

You can enter the samples you have issued or still need to send either directly or using the quick add function, >> on page 104.

To add a sample directly:

1. Switch to the desired person and select **New > New Sample** from the context menu.
2. Enter **Date** and **Business Area** and click on **Next**.
3. Select the item.

Samples IND 40mg

Menu | Edit | Save | Cancel | [Document Icon]

Date 16.09.2013	Rep ID <u>Stephen Smith</u>
Business Area OTC	Status
Item No. 11001	
Item name IND 40mg	
Available Quota *	Lot No.
Product	
Sector Own Product	Prod.Cat. Cardio-vascular
Brand Indramal	Grade Tablet
Quantity issued	Order quantity
Price	Currency

In order to be able to enter an item as a sample, the following conditions need to be met:

- The current date must be either during or after the launch phase (except for items that are not subject to quotas).
4. Enter the number of units issued as samples in the **Quantity issued** field and the amount that you still need to send in the **Order quantity** field, >> on page 224.
 5. Enter additional data such as the **Lot No.**, **Status** etc.

You are automatically entered in the **Rep ID** field.

6. Save.

Note: Note: You can access the **quick add** function for samples from an activity. In this case, information is automatically transferred from the activity to the sample

record (**Date**, **Rep ID**, **Business Area**, **MA_StaNo**, **MA_SerNo**). When using the quick add function, a sample code needs to be defined for the rep's **Business Area**, >> on page 222. You can define which items should be displayed in the quick add area, >> *Special Serial Entry Configurations (OTC)* in the Aurea CRM web Administrator Guide. The **Lot No.** and current quantity are displayed in the quick add area. Use the **Lots without quantity** configuration entry (**Inventory** category) to only display the lot number, >> CRM.core Administrator Guide and Aurea CRM web Administrator Guide. Click on the **Special Offer** button in the quick add area to only display samples for currently valid special offers; the key fields entered in the special offer are transferred to any items added in the quick add area, >> on page 227.

Issued Samples and Samples to be Sent

You can enter the following for each sample:

Field	Explanation
Stock	Determines the stock that the samples are deducted from. The quantity in the Stock info area is automatically decreased by the amount entered in the Quantity issued field, >> on page 256.
Quantity issued	Enter the number of samples that have been issued to the person here. Enter negative numbers to determine that the quantity entered in this field is added to the stock (if samples are returned).
Order quantity	Enter the number of samples that still need to be sent to this person here. Quantities entered in the Order quantity field are ignored in stock calculations, as these samples are generally sent out directly from central stores and therefore have no influence on a rep's stocks.
Status	If you have entered data in the Order quantity field, this field is set to "Ordered".

The available quota is calculated based on the values in the **Quantity issued** and **Order quantity** fields, >> on page 224.

Available Quota

Aurea CRM allows you to monitor the amount of samples (of an item) a person has received and the amount they can still receive.

The currently available quota (i.e. the number of units of an item that a person can still receive) is determined per item and customer based on information stored in various info areas:

Info Area	Field	Explanation
Person	No sample limit	If this field is enabled for a person (or the person is assigned to an appropriate category where No sample limit is enabled), the person can receive an unlimited number of samples of each item, >> on page 222.
Sample Code	Allocated	If this field is disabled all persons can receive an unlimited quantity of this item as samples.
Sample Code	Launch start Launch end	Start and end date of the launch phase for the item. By default, the available quota for an item is calculated for a calendar year. For information on date-based quotas, >> on page 225.
Sample Code	Units during launch Units after launch	Maximum number of units of this item that a person can receive during and after the introductory phase.

When entering samples, the system checks the date entered in the **Sample** info area to determine whether the launch phase has started or ended. The maximum available quote is calculated based on the data in the **Sample Code** info area. The currently available quota is calculated from this upper limit and the number of samples already issued to the person this current year, >> on page 225.

The available quota is updated in the **Available Quota** field in the quick add area or when adding or editing a sample record once a new entry is made in the **Quantity issued** and **Order quantity** fields. If a person or sample item is not subject to a quota, '*' is displayed in the **Available Quota** field.

Note: Note: If the available quota is exceeded, the record cannot be added. Your administrator can define that records can still be added if the available quota is exceeded using the **Quota exceeded** option (**Sample** category) in the **Configuration** info area, >> CRM.core Administrator Guide. In this case, a warning message is displayed if the quota is exceeded.

Date-based Quotas

By default, the available quota for an item is calculated for a calendar year. The quota defined in the **Units after launch** field applies to the end of the calendar year following the launch phase.



Your administrator can use the **Date-based quota** configuration entry (**Sample** category) to define that the quota applies for a full year after the last launch end date defined for the item, instead of until the end of the calendar year, >> CRM.core Administrator Guide.

If you are using date-based quotas, the quota is calculated per item based on the **End of Period** entered in the sample code record. This is the latest **Launch end** date + 1 year.

The available quota is calculated based on the currently valid record in the **Samples/Year** info area (i.e. **End of Period** > date the sample was issued). If no such record exists, it is added automatically. The number of samples issued is calculated when adding the new record.

Overview

Aurea CRM allows you to display an overview of the samples issued to a customer during and after the launch phase, as well as an overview of any samples that still need to be sent.

Samples/Year

The **Samples/Year** info area provides you with an overview of the samples issued to a customer during and after the launch phase.

- Select  (**Sales**) > **Search Samples/Year**.

The current number of samples issued per person, item and sample period is displayed:

When issuing samples, Aurea CRM calculates the available quota based on the number of samples that have been issued or still need to be sent, >> on page 224.

Samples



Select **(Sales) > Samples** and click on search to list all samples that have been issued or that still need to be sent. Use the context menu to switch to the company, person or activity that a sample belongs to.

Search Results

Date	Rep ID	Business Area	Ite...	Item name	Q...	O...	A...
01.03.20...	Chris Aki	OTC	1844	IND 10mg			
			11001	IND 40mg			
		ma	232323	Werbekarton Indramal			
			80300	Werbekarton Tramulys		3	
				Werbekarton Tramulys	4	3	
18.12.20...	Kazuko Kanzaki	OT		Werbekarton Tramulys	5	5	
07.01.20...	Chris Aki	OT		Werbekarton Tramulys	8		
08.01.20...	Chris Aki	OTC	80300	Werbekarton Tramulys	9		
09.01.20...	Kazuko Kanzaki	OTC	80300	Werbekarton Tramulys	45		
26.02.20...	Kazuko Kanzaki	OTC	80300	Werbekarton Tramulys	5		

Menu [X]

- Tab View
- Delete
- Go to All Related [>]

- Company
- Person
- Activites

17

Special Offers

Special Offers

Learn how to add offers and discounts and manage them.

Use special offers to:

- Define volume scales and discounts for customer groups or customers that are applied when adding offers or orders.
- Add special offer items, which can be displayed exclusively in the quick add area.
- Define fixed prices and discounts for various volumes for special offer items (for items, sectors, product groups, brands, grades).
- Define discount scales for freely definable item groups.
- Link special offers to activities and associated work orders.

Adding Special Offers

Special offers are not company-specific.

To add a special offer:

1. Select  (Marketing) > **New Special Offer**.

Special Offer Off-season

Menu | Edit | Save | Cancel | [Document Icon]

Special Offer No. 0023 Additional items

Special Offer Name Off-season Currency Euro

Rep ID Stephen Smith Customer Group

Starts on 01.10.2013 Ends on 28.02.2014

Order Value	Marketing Activity	Text
Order Value 1 250,00		Cash cond. 1 <input type="checkbox"/>
Order Value 2 400,00		Cash cond. 2 <input type="checkbox"/>
Order Value 3 500,00		Cash cond. 3 <input type="checkbox"/>
Order Value 4		Cash cond. 4 <input type="checkbox"/>
Order Value 5		Cash cond. 5 <input type="checkbox"/>

2. Enter the **Special Offer No.**, **Special Offer Name**, and the time period the special offer is valid (**Starts on** and **Ends on** fields).
3. Enter data such as the **Currency**, **Customer Group** etc.
4. Enter additional data on the various tabs, such as the volume scales (**Order Value 1-5**) and the discount applied to orders based on the value of the order (**Cash cond. 1-5**) fields. You can also enter details on the related marketing activity.

Discount Scale

Special offers include condition fields (**Cash cond. 1-5** fields) that are linked to a value entered in an offer/order (**Cash Cond.** field). These fields allow you to determine the maximum discount based on the value of the order. These fields are only taken into account if the **Additional items** field is disabled.

If the special offer number is entered in an order or offer, the appropriate discounts are applied; in the case of the example above:

Offer/Order Value	Maximum Value in the Cash Cond. (Special Offer) field
1 – 250 euro	5.00%
251 – 400 euro	6.00%
401 – 500 euro	12.00%

The last volume bracket is also used if the value in the order exceeds the maximum value entered. If you only define three values, as in this example, the last discount also applies to orders over 500 euro.

A message is displayed in Aurea CRM win if you enter a value in the **Cash. Cond (Special Offer)** field that exceeds the maximum discount. This message is for information only and the order/offer can still be saved.

Special Offer Items

You can add special offer items to special offers. These items are then available in the quick add area.

To add a special offer item:

1. The following options are available:
 - Switch to the desired special offer and select **New > New Special Offer Item** from the context menu.
 - Switch to the special offer you want to add the special offer item to, switch to the **Special Offer Items** tab and click on **⊕ (New)**.
2. Select an item from the **Item No.** field.

The **Item Name**, **Sector**, **Product Group**, **Brand** and **Grade** are entered automatically.
3. Enter additional data such as the **Quantity**, **Price** etc.

Note: Note: The **Order**, **POS Monitoring**, **Refunding**, **Promotional Material** and **Sample** fields determine whether a link to the corresponding info area should be established when linking the special offer with an activity.

Note: Note: If you want to add a special offer item for all items in the "Nutrition" sector, only enter the **Sector** and leave the other fields empty. A combination of criteria (e.g. all items in the "noodles" product group in the sector "own products") is not possible. All items in this sector are displayed in the quick add area (**Special Offer** filter). You can also group special offer items in the **Item Group** info area.

Special Offer Bulk Volumes

Select **Special Offer Bulk Volumes** from a special offer item's context menu to define bulk volumes for individual special offer items in order to determine fixed prices, bulk discounts and discounts in kind depending on the quantity of an item entered in an offer or order item record.

You can also define discount scales applied at the offer or order level for special offer items added for a product group or sector.

These volume scales are defined in the same way as conditions.

Special offer bulk volumes are taken into account prior to all conditions and price lists when pricing items and applying discounts.

Item Group Discounts

You can define groups for special offer items in the **Item Group** info area (not available in the default version of Aurea CRM web).

The child **Volume** info area allows you to define quantity scales for these item groups in order to define price discounts or discounts in kind.

Enter the quantity the discount applies to in the **Quantity from/to** fields for bulk discounts or a value range in the **Value from/to** fields for discounts based on the value. Enter the **Discount** and/or **Discount vol. in kind**.

Enter a **Currency** for the values (the values are automatically converted to the currency entered in the offer/order when adding an offer/order).

Once you have added the item group, assign an item to it. To do so, switch to the **Special Offer Item** info area and enter the desired group in the **Item Group** field of those items you wish to group. If you are using discounts in kind, you also need to enter the percentage of the (group's) discount in kind to apply to the item in the **Discount in kind share** field.

Discounts are applied when entering offers/orders once the quantity or value of all items surpasses the threshold defined in the volume record. This means that, irrespective of which items in the group are actually added to the offer/order, the discount is applied to all items (in the group). Each time items are added, the item discounts are recalculated.

Special Offer Management

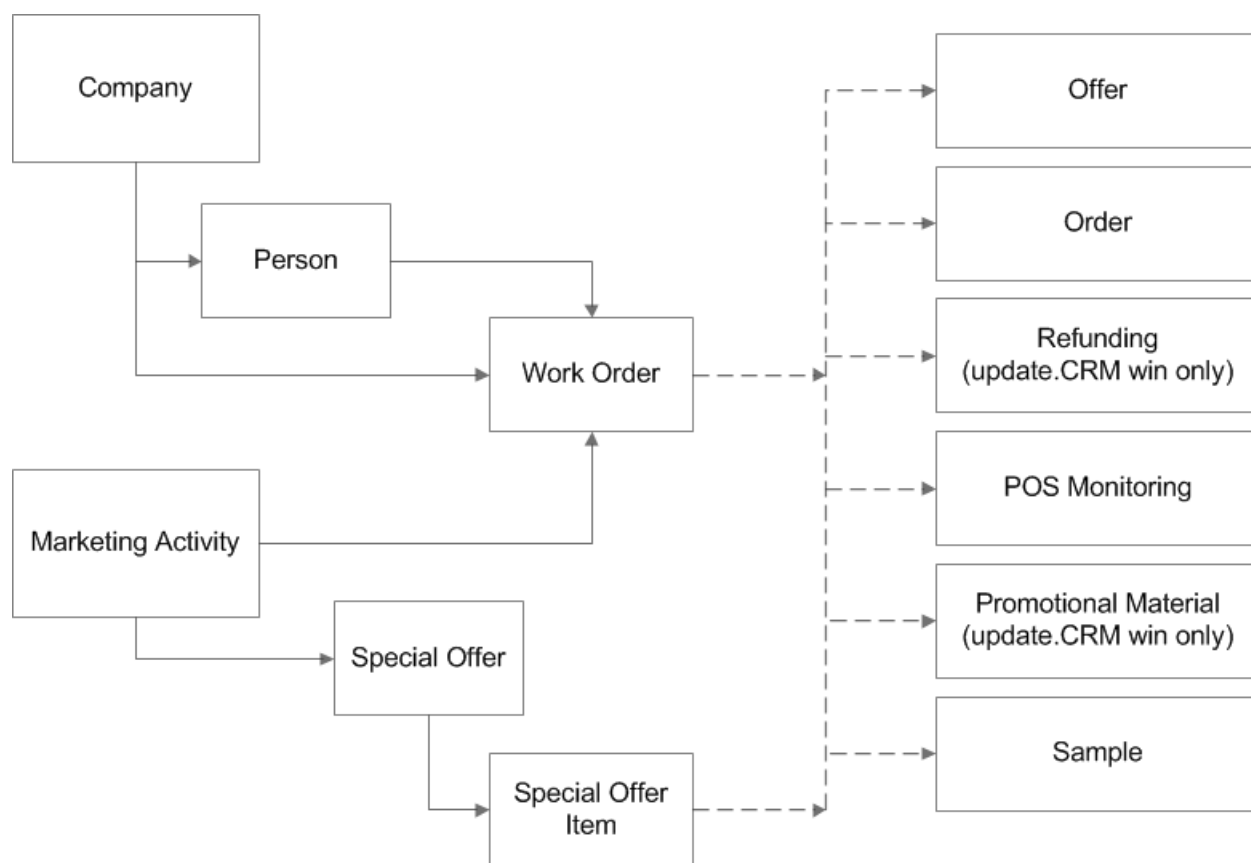
Use Aurea CRM's special offer management features to assign special offers to target groups and access special offer items automatically in the quick add area.

Associating Special Offers with Marketing Activities

Special offers can be associated with existing marketing activities and to the related work orders generated within the scope of the marketing activity. The following fields are transferred from the marketing activity to the special offer:

- **AK_StaNo** and **AK_SerNo** (station number and serial number of the marketing activity)
- **Marketing Activity, Level** and **Variant (Marketing Act.)**
- **VR_StaNo** and **VR_SerNo** (station and serial number of the sales cycle).

A link to the special offer is established via a work order record and is only established when adding items using the quick add function, >> on page 104. The following diagram depicts this link:



This association with the marketing activity and work order allows multiple special offers and consequently specific products to be assigned to a company or person. The rep assigned to a company/person receives an overview of the planned marketing activity steps, carries out these steps and then enters the feedback in the **Work Order** info area (**Response 1 (Marketing Act.) - Response 5 (Marketing Act.)** fields). For example, if the marketing activity involved entering details on a POS, the rep can access the items for which a special offer exists in the quick add area (**Special Offer** filter). The time period entered in the work order and special offer are taken into account.

Note: Note: The **Special Offer** filter is not available by default for promotional material and refunding records in Aurea CRM web, see [SerialEntry](#) in the *Aurea CRM web Administrator Guide*.

Special Offer Management: Workflow

To use the special offer management features:

1. Add a marketing activity.
2. Add work orders for companies/persons, either:
 - for target groups by executing a marketing activity.
 - manually by selecting **Go to All Related > All Work Orders** from the menu and clicking on **⊕ (New)**

Note: Note: If you add a work order manually, enter the marketing activity (in the **Marketing Activity** and **-> Marketing Activity** fields).

3. The following fields are transferred to the **Work Order** info area from the **Execution (Marketing Activity)** info area: **Work Order Start, Word Order End, Work orders for group, Work order type, Work order format, Mandatory work order.**
4. Add a special offer and assign a marketing activity to it (-> **Marketing Activity** field). The **AK_StaNo** and **AK_SerNo** (station number and serial number of the marketing activity), **Marketing Activity, Level** and **Variant (Marketing Act.)** are entered automatically. The station number and serial number of the sales cycle (**VR_StaNo** and **VR_SerNo** are also transferred).

Note: Note: The **Additional items** check box must be enabled in the special offer.

5. Enter the time period the special offer is valid (**Starts on** and **Ends on**) in the special offer.
6. Add the special offer items. Determine in which info areas the item should be available using the quick add function.
7. For example, if you add a new order for a company that a work order has been added for, the items currently on special offer are listed in the quick add area (**Special Offer** filter).

Special Offer Management: Usage

If you access the quick add function for a company or person, the system searches for a applicable special offer items as follows:

- The system checks for valid work orders for the following date:
 - **Offer** info area: Date in the offer record
 - **Order** info area: Date in the order record
 - **Refunding** info area: Date in the refunding record
 - **Promotional Material** info area: current date
 - **POS Monitoring** info area: Date in the POS monitoring record
 - **Sample** info area: Date entered in the quick add area
- The marketing activities entered in the work orders are determined.
- All special offers linked to the marketing activities are searched for, and the period for which the special offer is valid is compared to the date determined previously.
- The items for which a special offer is currently valid are listed in the quick add area (**Special Offer** filter).
- The same item may be listed more than once if it is entered in more than one special offer.
- The key fields in the special offer are copied to the special offer items. The **Price** and **Quantity** fields in the special offer item used to create the offer/order item can thus be displayed.

Example

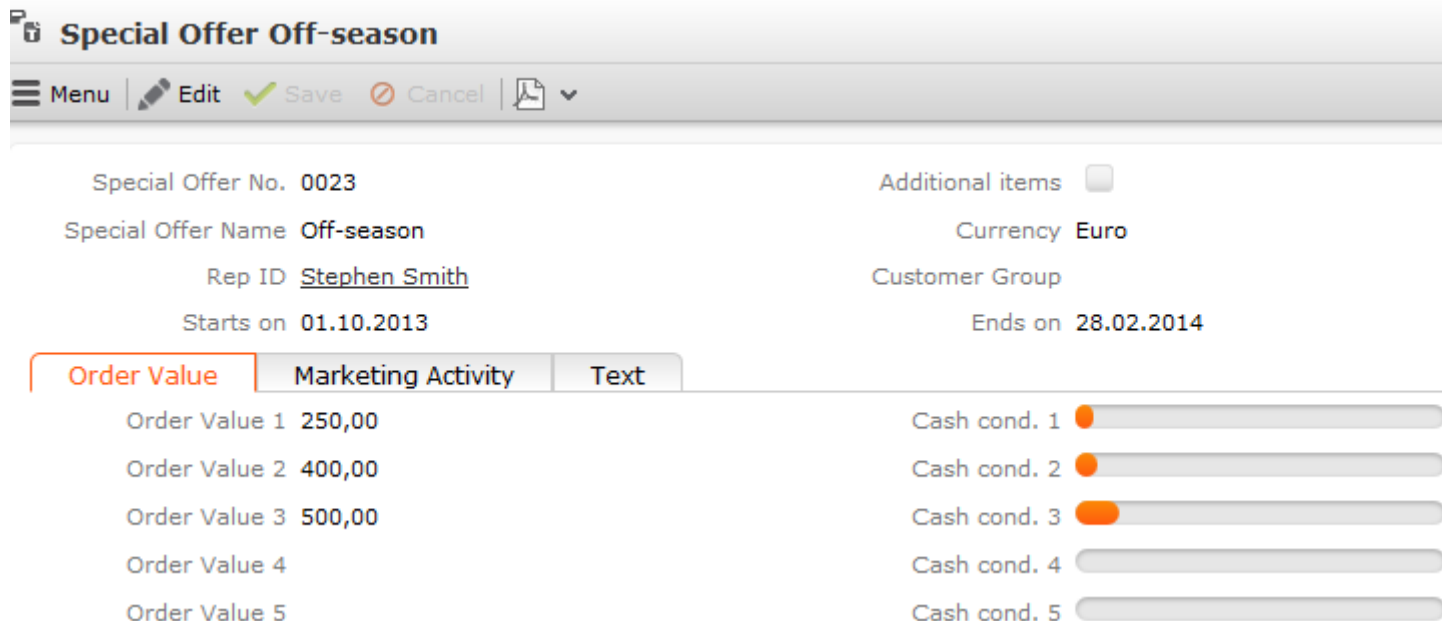
An field rep has an activity with a person entered in his calendar. The person is part of the target group for a defined marketing activity that is currently ongoing. The work order added for the rep informs the rep that samples should be issued; the rep opens the quick add area for samples. The rep clicks on the **Special Offer** button in the quick add area to display an overview of the samples that are currently on special offer and are relevant to this customer.

Adding Special Offers

Special offers are not company-specific.

To ad a special offer:

1. Select  (Marketing) > **New Special Offer.**



Special Offer Off-season

Menu | Edit | Save | Cancel | [Document Icon]

Special Offer No. 0023 Additional items

Special Offer Name Off-season Currency Euro

Rep ID Stephen Smith Customer Group

Starts on 01.10.2013 Ends on 28.02.2014

Order Value	Marketing Activity	Text
Order Value 1 250,00		Cash cond. 1 <input type="range"/>
Order Value 2 400,00		Cash cond. 2 <input type="range"/>
Order Value 3 500,00		Cash cond. 3 <input type="range"/>
Order Value 4		Cash cond. 4 <input type="range"/>
Order Value 5		Cash cond. 5 <input type="range"/>

2. Enter the **Special Offer No.**, **Special Offer Name**, and the time period the special offer is valid (**Starts on** and **Ends on** fields), >> on page 229.
3. Enter data such as the **Currency**, **Customer Group** etc.
4. Enter additional data on the various tabs, such as the volume scales (**Order Value 1-5**) and the discount applied to orders based on the value of the order (**Cash cond. 1-5**) fields, >> on page 228. You can also enter details on the related marketing activity, >> on page 266.

Discount Scale

Special offers include condition fields (**Cash cond. 1-5** fields) that are linked to a value entered in an offer/order (**Cash Cond.** field). These fields allow you to determine the maximum discount based on the value of the order. These fields are only taken into account if the **Additional items** field is disabled.

If the special offer number is entered in an order or offer, the appropriate discounts are applied; in the case of the example above (>> on page 227):

Offer/Order Value	Maximum Value in the Cash Cond. (Special Offer) field
1 – 250 euro	5.00%
251 – 400 euro	6.00%
401 – 500 euro	12.00%

The last volume bracket is also used if the value in the order exceeds the maximum value entered. If you only define three values, as in this example, the last discount also applies to orders over 500 euro.

A message is displayed in Aurea CRM win if you enter a value in the **Cash. Cond (Special Offer)** field that exceeds the maximum discount. This message is for information only and the order/offer can still be saved.

Special Offer Items

You can add special offer items to special offers. These items are then available in the quick add area, >> on page 104.

To add a special offer item:

- The following options are available:
 - Switch to the desired special offer and select **New > New Special Offer Item** from the context menu.
 - Switch to the special offer you want to add the special offer item to, switch to the **Special Offer Items** tab and click on **⊕ (New)**.
- Select an item from the **Item No.** field.

The **Item Name**, **Sector**, **Product Group**, **Brand** and **Grade** and entered automatically.

3. Enter additional data such as the **Quantity**, **Price** etc.

Note: Note: The **Order**, **POS Monitoring**, **Refunding**, **Promotional Material** and **Sample** fields determine whether a link to the corresponding info area should be established when linking the special offer with an activity, >> on page 229.

Note: Note: If you want to add a special offer item for all items in the "Nutrition" sector, only enter the **Sector** and leave the other fields empty. A combination of criteria (e.g. all items in the "noodles" product group in the sector "own products") is not possible. All items in this sector are displayed in the quick add area (**Special Offer** filter). You can also group special offer items in the **Item Group** info area, >> on page 229.

Special Offer Bulk Volumes

Select **Special Offer Bulk Volumes** from a special offer item's context menu to define bulk volumes for individual special offer items in order to determine fixed prices, bulk discounts and discounts in kind depending on the quantity of an item entered in an offer or order item record.

You can also define discount scales applied at the offer or order level for special offer items added for a product group or sector.

These volume scales are defined in the same way as conditions, >> on page 235.

Special offer bulk volumes are taken into account prior to all conditions and price lists when pricing items and applying discounts.

Item Group Discounts

You can define groups for special offer items in the **Item Group** info area (not available in the default version of Aurea CRM web).

The child **Volume** info area allows you to define quantity scales for these item groups in order to define price discounts or discounts in kind.

Enter the quantity the discount applies to in the **Quantity from/to** fields for bulk discounts or a value range in the **Value from/to** fields for discounts based on the value. Enter the **Discount** and/or **Discount vol. in kind**.

Enter a **Currency** for the values (the values are automatically converted to the currency entered in the offer/order when adding an offer/order).

Once you have added the item group, assign an item to it. To do so, switch to the **Special Offer Item** info area and enter the desired group in the **Item Group** field of those items you wish to group. If you are using discounts in kind, you also need to enter the percentage of the (group's) discount in kind to apply to the item in the **Discount in kind share** field.

Discounts are applied when entering offers/orders once the quantity or value of all items surpasses the threshold defined in the volume record. This means that, irrespective of which items in the group are actually added to the offer/order, the discount is applied to all items (in the group). Each time items are added, the item discounts are recalculated, >> on page 199.

Special Offer Management

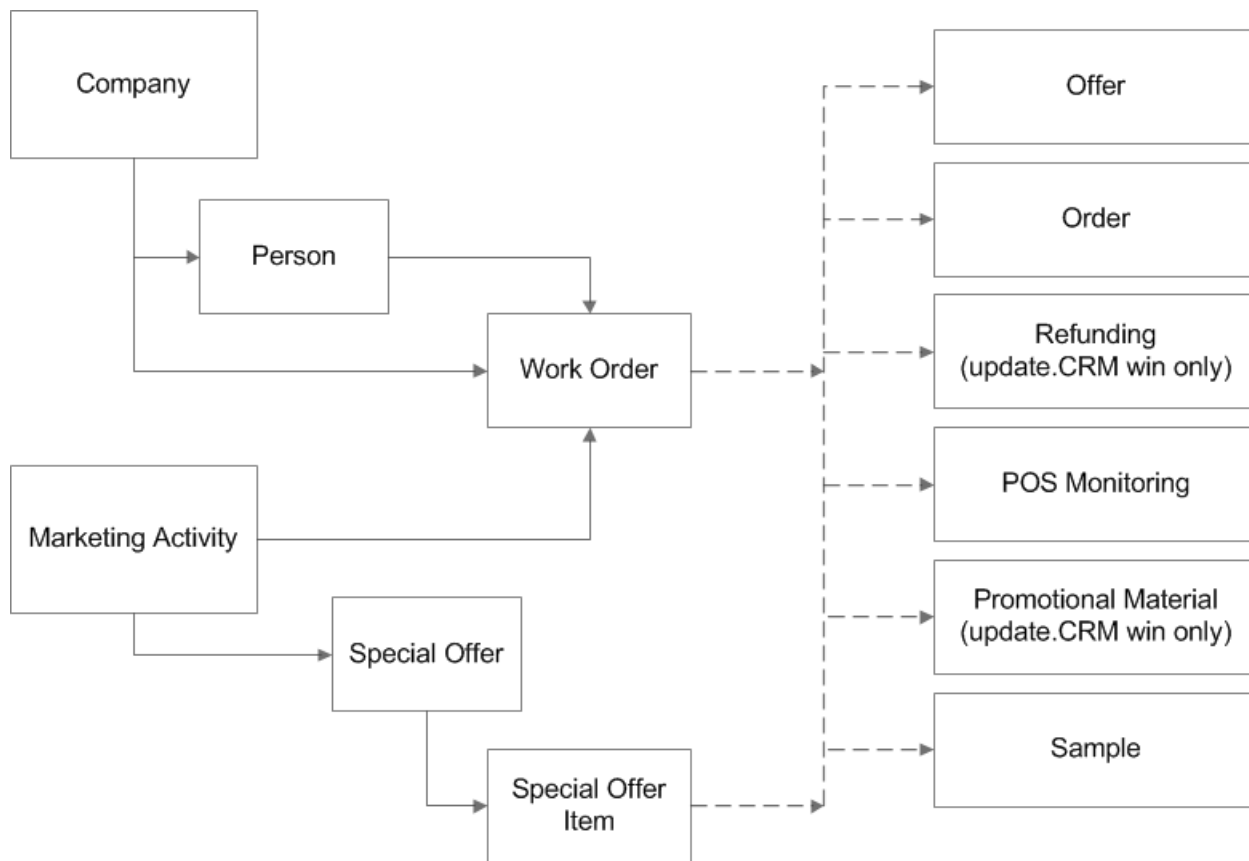
Use Aurea CRM's special offer management features to assign special offers to target groups and access special offer items automatically in the quick add area.

Associating Special Offers with Marketing Activities

Special offers can be associated with existing marketing activities and to the related work orders generated within the scope of the marketing activity. The following fields are transferred from the marketing activity to the special offer:

- **AK_StaNo** and **AK_SerNo** (station number and serial number of the marketing activity)
- **Marketing Activity, Level** and **Variant (Marketing Act.)**
- **VR_StaNo** and **VR_SerNo** (station and serial number of the sales cycle), >> on page 239.

A link to the special offer is established via a work order record and is only established when adding items using the quick add function, >> on page 104. The following diagram depicts this link:



This association with the marketing activity and work order allows multiple special offers and consequently specific products to be assigned to a company or person. The rep assigned to a company/person receives an overview of the planned marketing activity steps, carries out these steps and then enters the feedback in the **Work Order** info area (**Response 1 (Marketing Act.) - Response 5 (Marketing Act.)** fields). For example, if the marketing activity involved entering details on a POS, the rep can access the items for which a special offer exists in the quick add area (**Special Offer** filter). The time period entered in the work order and special offer are taken into account.

Note: Note: The **Special Offer** filter is not available by default for promotional material and refunding records in Aurea CRM web, >> *SerialEntry* in the Aurea CRM web Administrator Guide.

Special Offer Management: Workflow

To use the special offer management features:

1. Add a marketing activity, >> on page 266.
2. Add work orders for companies/persons, either:
 - for target groups by executing a marketing activity, >> on page 277.
 - manually by selecting **Go to All Related > All Work Orders** from the menu and clicking on ⊕ (**New**)

Note: Note: If you add a work order manually, enter the marketing activity (in the **Marketing Activity** and **-> Marketing Activity** fields).

3. The following fields are transferred to the **Work Order** info area from the **Execution (Marketing Activity)** info area: **Work Order Start**, **Word Order End**, **Work orders for group**, **Work order type**, **Work order format**, **Mandatory work order**.
4. Add a special offer and assign a marketing activity to it (-> **Marketing Activity** field). The **AK_StaNo** and **AK_SerNo** (station number and serial number of the marketing activity), **Marketing Activity**, **Level** and **Variant (Marketing Act.)** are entered automatically. The station number and serial number of the sales cycle (**VR_StaNo** and **VR_SerNo** are also transferred).

Note: Note: The **Additional items** check box must be enabled in the special offer.

5. Enter the time period the special offer is valid (**Starts on** and **Ends on**) in the special offer, >> on page 227.
6. Add the special offer items. Determine in which info areas the item should be available using the quick add function, >> on page 228.
7. For example, if you add a new order for a company that a work order has been added for, the items currently on special offer are listed in the quick add area (**Special Offer** filter), >> on page 231.

Special Offer Management: Usage

If you access the quick add function for a company or person, the system searches for a applicable special offer items as follows:

- The system checks for valid work orders for the following date:
 - **Offer** info area: Date in the offer record
 - **Order** info area: Date in the order record
 - **Refunding** info area: Date in the refunding record
 - **Promotional Material** info area: current date
 - **POS Monitoring** info area: Date in the POS monitoring record
 - **Sample** info area: Date entered in the quick add area
- The marketing activities entered in the work orders are determined.
- All special offers linked to the marketing activities are searched for, and the period for which the special offer is valid is compared to the date determined previously.

- The items for which a special offer is currently valid are listed in the quick add area (**Special Offer** filter).
- The same item may be listed more than once if it is entered in more than one special offer.
- The key fields in the special offer are copied to the special offer items. The **Price** and **Quantity** fields in the special offer item used to create the offer/order item can thus be displayed.

Example

An field rep has an activity with a person entered in his calendar. The person is part of the target group for a defined marketing activity that is currently ongoing. The work order added for the rep informs the rep that samples should be issued; the rep opens the quick add area for samples. The rep clicks on the **Special Offer** button in the quick add area to display an overview of the samples that are currently on special offer and are relevant to this customer.

18

Conditions

Conditions

Learn how to enter conditions for individual companies or company groups, which are automatically used to price items in offers and orders.

Different price lists allow you to define a flexible price structure:

- You can define conditions with fixed prices for individual items, bulk discounts at the offer/order level and bulk discounts an/or discounts in kind at the item level.
- Conditions can either apply to an individual item, all items or the items in a product group, sector, brand or grade.
- For each discount entered in a condition, you can define whether an additional discount can be granted or whether the discount in the condition only applies if no manual discount has been defined.
- You can define volumes for conditions.
- You can determine the maximum extent of conditions for special offers.

In order for conditions to be automatically applied to the pricing of items, the following must apply:



- Reps need to be assigned to business areas.
- Valid weightings need to be defined per item and business area.
- Valid prices must be available for the items.

Conditions for individual companies are defined in the **Company Conditions** info area; all other conditions are defined in the **Conditions** info area.

For information on the order in which conditions are applied when adding offers and orders, see [Offers and Orders](#) on page 467.

Defining Conditions

To define conditions:

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

Condition

Menu | Edit | Save | Cancel |  v

Currency Euro	Customer Group Customer Group 1
Valid from 04.02.2013	Valid to 30.11.2013
Conditions apply to Item: Additional	Discount <input type="text"/>
Cond. in k.	Fixed price 5,00
Payment period	Paym.per. un.
<input checked="" type="radio"/> Product <input type="radio"/> Text	
Item No.	
Item name	
Sector Own Product	Prod.Cat.
Brand	Grade

4. Enter the desired **Currency**.
5. Define the time period the conditions are valid for in the **Valid from** and **Valid to** fields.
6. Select a **Customer Group** if you want the conditions to only apply to offers/orders added for companies assigned to a particular customer group.
7. Enter details on the items the conditions should apply to on the **Product** tab.
 - **Item No./Item name:** Enter an item to apply the conditions to a particular item.

Note: Note: Fixed price conditions can only be defined for individual items. If you select an item from the **Item No.** field, leave the **Sector**, **Product Group**, **Brand** and **Grade** fields empty in order for the conditions to be applied.

- **Sector/Product Group/Brand/Grade:** Select a sector, product group, brand or grade to define conditions for all items where these values are entered. For example, if you want to define conditions that apply to all items in a product group, enter a **Product Group** and leave the **Sector**, **Brand**, **Grade** and **Item No.** fields empty.
8. Enter the conditions:
 - Enter a **Fixed price** to define a fixed price for an item.
 - Enter a **Discount** (percentage) to define a discount **at the offer/order level**. This discount is applied to the weighted quantity of all offer and order items that the conditions apply to.
 - Enter a **Bulk discount (%)** to define a discount **at the offer/order item level**.

Note: Note: Discounts at the offer/order level overwrite discounts at the item level.

- Enter a **Discount vol. in kind** to define the quantity of items granted as a **discount in kind**.
9. Select what the conditions apply to in the **Conditions apply to** field:
- **Item: Additional:** The discount is applied in addition to the other discounts. The discount entered manually in offer or order items is applied first, and then the additional discount from the conditions is calculated.
 - **Item: if nothing entered:** The discount is only applied if no other discount is entered in the offer/order item.
 - **Item: Not Included:** This discount takes precedence over a discount entered manually in an offer or order item; if a discount has been entered there, it is ignored.

Note: Note: This setting has no effect on fixed price conditions.

When determining the value of items, the fixed price is first taken into account followed by bulk discounts or discounts in kind, see [Pricing and Discounts](#) on page 484.

Defining Company Conditions

To define conditions for a specific company:

1. Switch to the desired company.
2. Select **Go to All Related > All Comp. Conditions** from the context menu.
3. Click on **+** (**New**).

New: Company Conditions

✓ Save

*Currency	GBP	+ v	Business Area	OTC
Valid from	01.09.2013	v	Valid to	30.09.2013
Conditions apply to	Item: Additional	v	Discount	<input type="range"/>
Fixed price			Cond. in k.	
Payment period			Paym.per. un.	
<input checked="" type="radio"/> Product <input type="radio"/> Text				
Item No.		Q X		
Item name				
Sector		+ v	Prod.Cat.	
Brand		+ v	Grade	

4. Company conditions must be defined for individual business areas: Select the desired business area in the **Business Area** field.
5. Enter the additional data as for general conditions.

Company conditions are applied before general conditions.

Volume Scales

You can define bulk volumes in conditions.

- To define fixed prices, quantities and discounts in kind based on the quantity of an item entered in an offer or order.
- To apply discounts based on the weighted volume of the entire offer/order.

Bulk volumes (not available by default in Aurea CRM web) are defined for conditions (or special offers, see [Special Offers](#) on page 545); i.e. these volumes also apply to a business area, all or some items for a company or a company group.

Fixed Price Volumes

You can define fixed prices for a certain conditions or company conditions record in the **Condition Scale** and **Company Condition Scale** info areas (these info areas are not available in the default version of Aurea CRM web).

To define volume-based fixed prices for individual items:

1. Select "Fixed price scale" in the **Volume Type** field.
2. Enter the **Volume From** and **Volume Up To** to define the quantity range.
3. Select "Order Item" in the **Comp. value** field.

Note: Note: These volumes also apply to offer items.

4. Enter a **Fixed price**.
5. Define additional volumes.

When adding offers and orders, the fixed price defined for the appropriate volume (based on the quantity entered) is used.

Discount Scales at the Order/Offer Level

You can define fixed prices for a certain conditions or company conditions record in the **Condition Scale** and **Company Condition Scale** info areas.

To define discounts for the weighted total quantity of all items added to an offer/order:

1. Select "Scale of discount (weighted total quantity)" in the **Volume Type** field.
2. Enter the **Volume From** and **Volume Up To** to define the quantity range.
3. Select "Total Order" in the **Comp. value** field.

Note: Note: The scale also applied to offers.

4. Enter a **Discount** (a percentage).
5. Define additional volumes.

When adding offers and orders, the corresponding discount defined for the appropriate volume (based on the weighted total quantity entered in the **Weighted total quantity** in the order or offer) is used.

Note: **Note:** In order for the discount defined in the condition scale record to be applied, the **Bulk discount (%)** field in the conditions record must be empty.

Discount Scales at the Item Level

You can define fixed prices for a certain conditions or company conditions record in the **Condition Scale** and **Company Condition Scale** info areas.

To define bulk discounts and/or discounts in kind at the item level:

1. Select "Scale of discount" in the **Volume Type** field.
 2. Enter the **Volume From** and **Volume Up To** to define the quantity range.
 3. Select "Order Item" in the **Comp. value** field.
-

Note: These volumes also apply to offer items.

4. Enter the discount in kind in the **Discount vol. in kind** field and/or a bulk discount in the **Discount** field.
-

Note: You can combined bulk discounts and discounts in kind. However the volume ranges must be the same.

5. Define additional volumes.

When adding offers and orders, the discount defined for the appropriate volume (based on the quantity entered) is used.

Note: In order for the discount defined in the condition scale record to be applied, the **Discount** field in the conditions record must be empty.

The condition scale applied to the offer or order item is entered in the **Scale of discount** field. Your administrator can also add this field to the quick add area, see *Serial Input Tab (OTC)* in the CRM.core Administrator Guide.


If you select a different discount scale in the **Scale of discount** field, the lower threshold of the scale is entered in the **Quantity** field and the corresponding discounts are entered in the **Discount % (Condition)** and **Discount vol. in kind** fields. Your administrator can disable this behavior using the **Do not apply scale of discount** configuration entry (**General Settings** category), >> CRM.core Administrator Guide.

Volume scales in company conditions are not taken into consideration when **Bulk Discount (%)** or **Discount vol. in kind** are empty. To change this behavior, the administrator can enable the [Disable check for mandatory fields in company conditions](#) in *CRM.core Administrator Guide*.

Corresponding offer and order items can be created automatically using triggers (see CRM.core Administrator Guide) for the units granted as a discount in kind.

Defining Conditions

To define conditions:

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

Condition

Menu | Edit | Save | Cancel | ▼

Currency Euro Valid from 04.02.2013 Conditions apply to Item: Additional Cond. in k. Payment period	Customer Group Customer Group 1 Valid to 30.11.2013 Discount <input type="text" value=""/> Fixed price 5,00 Paym.per. un.
<div style="border: 1px solid #ccc; display: flex; margin-bottom: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">Product</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">Text</div> </div>	
Item No. Item name Sector Own Product Brand	Prod.Cat. Grade

4. Enter the desired **Currency**.
5. Define the time period the conditions are valid for in the **Valid from** and **Valid to** fields.
6. Select a **Customer Group** if you want the conditions to only apply to offers/orders added for companies assigned to a particular customer group.
7. Enter details on the items the conditions should apply to on the **Product** tab.
 - **Item No./Item name:** Enter an item to apply the conditions to a particular item.

Note: Note: Fixed price conditions can only be defined for individual items. If you select an item from the **Item No.** field, leave the **Sector**, **Product Group**, **Brand** and **Grade** fields empty in order for the conditions to be applied.

- **Sector/Product Group/Brand/Grade:** Select a sector, product group, brand or grade to define conditions for all items where these values are entered. For example, if you want to define conditions that apply to all items in a product

group, enter a **Product Group** and leave the **Sector, Brand, Grade** and **Item No.** fields empty.

8. Enter the conditions:

- Enter a **Fixed price** to define a fixed price for an item.
- Enter a **Discount** (percentage) to define a discount **at the offer/order level**. This discount is applied to the weighted quantity of all offer and order items that the conditions apply to.
- Enter a **Bulk discount (%)** to define a discount **at the offer/order item level**.

Note: Note: Discounts at the offer/order level overwrite discounts at the item level.

- Enter a **Discount vol. in kind** to define the quantity of items granted as a **discount in kind**.

9. Select what the conditions apply to in the **Conditions apply to** field:

- **Item: Additional:** The discount is applied in addition to the other discounts. The discount entered manually in offer or order items is applied first, and then the additional discount from the conditions is calculated.
- **Item: if nothing entered:** The discount is only applied if no other discount is entered in the offer/order item.
- **Item: Not Included:** This discount takes precedence over a discount entered manually in an offer or order item; if a discount has been entered there, it is ignored.

Note: Note: This setting has no effect on fixed price conditions.

When determining the value of items, the fixed price is first taken into account followed by bulk discounts or discounts in kind, >> on page 199.

Defining Company Conditions

To define conditions for a specific company:

1. Switch to the desired company.
2. Select **Go to All Related > All Comp. Conditions** from the context menu.
3. Click on **⊕ (New)**.

New: Company Conditions

✓ Save

*Currency + ▾ Business Area

Valid from ▾ Valid to

Conditions apply to ▾ Discount

Fixed price

Payment period Cond. in k.

Paym.per. un.

Product

Item No. 🔍 ✕

Item name

Sector + ▾ Prod.Cat.

Brand + ▾ Grade

4. Company conditions must be defined for individual business areas: Select the desired business area in the **Business Area** field.

5. Enter the additional data as for general conditions, >> on page 233.

Company conditions are applied before general conditions, >> on page 199.

Volume Scales

You can define bulk volumes in conditions.

- To define fixed prices, quantities and discounts in kind based on the quantity of an item entered in an offer or order, >> on page 235 and on page 235.
- To apply discounts based on the weighted volume of the entire offer/order, >> on page 235.

Bulk volumes (not available by default in Aurea CRM web) are defined for conditions (or special offers, >> on page 228 and on page 229); i.e. these volumes also apply to a business area, all or some items for a company or a company group.

Fixed Price Volumes

You can define fixed prices for a certain conditions or company conditions record in the **Condition Scale** and **Company Condition Scale** info areas (these info areas are not available in the default version of Aurea CRM web).

To define volume-based fixed prices for individual items:

1. Select "Fixed price scale" in the **Volume Type** field.
2. Enter the **Volume From** and **Volume Up To** to define the quantity range.

3. Select "Order Item" in the **Comp. value** field.

Note: Note: These volumes also apply to offer items.

4. Enter a **Fixed price**.
5. Define additional volumes.

When adding offers and orders, the fixed price defined for the appropriate volume (based on the quantity entered) is used, >> on page 193 and on page 200.

Discount Scales at the Order/Offer Level

You can define fixed prices for a certain conditions or company conditions record in the **Condition Scale** and **Company Condition Scale** info areas.

To define discounts for the weighted total quantity of all items added to an offer/order (>> on page 178):

1. Select "Scale of discount (weighted total quantity)" in the **Volume Type** field.
2. Enter the **Volume From** and **Volume Up To** to define the quantity range.
3. Select "Total Order" in the **Comp. value** field.

Note: Note: The scale also applied to offers.

4. Enter a **Discount** (a percentage).
5. Define additional volumes.

When adding offers and orders, the corresponding discount defined for the appropriate volume (based on the weighted total quantity entered in the **Weighted total quantity** in the order or offer) is used, >> on page 193 and on page 203.

Note: Note: In order for the discount defined in the condition scale record to be applied, the **Bulk discount (%)** field in the conditions record must be empty.

Discount Scales at the Item Level

You can define fixed prices for a certain conditions or company conditions record in the **Condition Scale** and **Company Condition Scale** info areas.

To define bulk discounts and/or discounts in kind at the item level:

1. Select "Scale of discount" in the **Volume Type** field.
2. Enter the **Volume From** and **Volume Up To** to define the quantity range.
3. Select "Order Item" in the **Comp. value** field.

Note: These volumes also apply to offer items.

4. Enter the discount in kind in the **Discount vol. in kind** field and/or a bulk discount in the **Discount** field.

Note: You can combined bulk discounts and discounts in kind. However the volume ranges must be the same.

5. Define additional volumes.

When adding offers and orders, the discount defined for the appropriate volume (based on the quantity entered) is used, >> on page 193 and on page 201.

Note: In order for the discount defined in the condition scale record to be applied, the **Discount** field in the conditions record must be empty.

The condition scale applied to the offer or order item is entered in the **Scale of discount** field. Your administrator can also add this field to the quick add area, >> *Serial Input Tab (OTC)* in the CRM.core Administrator Guide.

If you select a different discount scale in the **Scale of discount** field, the lower threshold of the scale is entered in the **Quantity** field and the corresponding discounts are entered in the **Discount % (Condition)** and **Discount vol. in kind** fields. Your administrator can disable this behavior using the **Do not apply scale of discount** configuration entry (**General Settings** category), >> CRM.core Administrator Guide.

Volume scales in company conditions are not taken into consideration when **Bulk Discount (%)** or **Discount vol. in kind** are empty. To change this behavior, the administrator can enable the **Disable check for mandatory fields in company conditions** under **Right module -> Configuration**. >> CRM.core Administrator Guide.

Corresponding offer and order items can be created automatically using triggers (>> CRM.core Administrator Guide) for the units granted as a discount in kind.

19

Sales Management

Sales Management

Learn how to manage sales and support.

You can display an overview of support data for each company and person; i.e. the number of phone calls, visits and meetings as well as associated costs.

Note: Aurea CRM win includes the **Sales Volume Statistics** and **Revenue Statistics** info areas, which can be used to import external sales figures.

Support

The **Support** info area (not available in Aurea CRM web by default) provides an overview of the support provided for a person or can automatically be calculated for the entire company.

Note: Calculating support data is handled using a CRM.server To-Do, see [CRM.core Administrator Guide](#).

The following are taken into account:

- Completed visits (activities of the type "Visit" with the status "Completed")
- Completed telephone calls (activities of the type "Telephone" with the status "Completed")
- Mailings
- The number and cost of orders (only available for orders, as orders are always company-related)

The support data for a person only takes into account those records added for that person. The support data for companies applies to the whole company, i.e. all records that are related to the company and any persons in the company are taken into account.

The calculation takes place for each year that includes at least one mailing, telephone call or visit, and corresponding support records are updated or created.

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20

Sales Cycles

Sales Cycles

Learn about sales cycle and its phases.

A sales cycle defines a time period during which a specific item (e.g. asparagus in spring, 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, special offers that apply to items, promotional material to be used etc. Sales cycles can overlap.



Select  (Marketing) > **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 promotional material). Special offers including items (and possible conditions) that are relevant to the sales cycle can be linked to each marketing activity. Items are defined in the item master info area, and can then be added as special offer items. The quick add flags (e.g. **Order**, **Refunding**) need to be enabled in the item master.

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 other records (activities, refunding etc.) via marketing activities, special offers or when adding new records based on the date and business area entered.

- If a **marketing activity** is assigned to a sales cycle, and linked to a special offer, activity or work order, the sales cycle entered in the marketing activity is entered in the linked record.

Note: The sales cycle's duration is transferred to special offers, but can be edited. If a special offer is added to a sales cycle and linked to a marketing activity, the sales cycle entered in the marketing activity is entered in the special offer.

- If promotional material, a sample, refunding item, listing, POS monitoring item or order/offer item is linked to a special offer, the sales cycle entered in the special offer is transferred to the linked record.

Note: If the link to the marketing activity or special offer is changed, the sales cycle entered in the linked records is overwritten (or **deleted** if the newly linked marketing activity or special offer is not linked to a sales cycle). If the sales cycle in the marketing activity or special offer is changed, this change is not applied to linked records.

- POS monitoring items, offer/order items, refunding items, promotional material, samples, activities and work orders are assigned to a sales cycles based on their **date and business area**. The business area is determined based on the business area assigned to the rep entered in the record (and defined in the **Rep Additional Info** info area).

The following table lists the date and rep fields that are used to determine the applicable sales cycle:

Date	Rep
Date (PS:4)	Rep ID (PS:5)
Date (AU:6)	Rep ID (AU:8)
Date (PR:7)	Rep ID (PR:9)
Date (VG:6)	Rep ID (VG:8)
Contract Start (20)	Rep ID (4)
Date (4)	Rep ID (5)
Starts on (0)	Rep ID (15)
Starts on (8)	Processed by ID (13)

21

Expenses and Receipts


Expenses and Receipts

Learn how to add expenses and receipts for reps.

You can use the Expenses info area to store the duration and costs of business trips. 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.

Expenses

To add a new expense record:

1. Select  (**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.


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.

Expenses

To add a new expense record:

1. Select  (**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: Note: Enter total amounts for flat rates, not the flat rate per day.

4. Save.

You can add receipts to expense records, >> on page 241.

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.

22

Account Managers

Accounts Managers - OTC only

Learn how to assign field reps and account managers to companies.

Note: This topic is relevant only for Business Logic - OTC

You can:

- Assign reps based on a company's address or a person's private address.
- Partition your sales activities for companies according to sectors and product groups.
- Enter reps in various roles.
- Automatically assign account managers to companies and persons.

Adding Account Managers

You manually or automatically add account managers in the **Account Manager** info area.

To add an account manager manually, switch to the desired company and select **Go to All Related > All Account Managers** from the context menu. Start the search and click on **⊕ (New)**.

The **Manual** field is automatically enabled for records that are added manually. If an account manager record is added automatically, the **Manual** field is enabled automatically if the record is subsequently edited. The route and support fields are an exception; these fields can be edited without the **Manual** field being enabled.

Allocating Account Managers

As a rule, account managers are allocated based on a customer's address. Reps are assigned to geographical areas in the City info area and for postal code ranges.

You can also use the **From Block No.** and **To Block No.** fields in the Allocation info area. Several records can be added and different account managers allocated for identical postcodes but different block numbers. The **Block No.** entered in the company or person record is compared to the block range entered here. If a block number is entered, the postal code is ignored, even if no matching allocation record is found for the block number.

When entering a postal code, access is required to the City info area in order to access the data there. For further details, see [City info area](#) in *CRM.core Administrator Guide*.

When adding (or editing) company records, the system checks whether reps have been entered in the appropriate record in the City and Allocation info areas. If a **Rep** and/or **Office Rep** are entered in the City info area, they are entered in the **Rep ID** and **Office Rep ID** fields in the company. If matching entries are found in both the City and Allocation info areas, the data in the Allocation info area is used.

Your administrator can prevent reps from being transferred from the City info areas by using the Disconnect Fields from City Table (City Table category) and Disconnect Fields from Country Table (Country Table category) in the [Configuration info area](#) in *CRM.core Administrator Guide*.

If account managers should not be allocated automatically, access can be denied to the Allocation and Business Line info areas using the Deny Access option in the [Rights module](#) in *CRM.core Administrator Guide*.

If you manually add a company of account manager record, account managers are transferred from the Allocation info area as follows:

- Transferred to company records:

If the **Product Group**, **Sector** and **Business Area** fields are empty.

If you add a new company, the system searches for an account manager in the Allocation info area allocated to the company's address. The account manager is automatically entered in the **Rep** field in the company record.

- Transferred to account manager records (of a FI/KP):

If at least one of the **Product Group**, **Sector** and **Business Area** fields contains data (when adding account managers manually).

If you manually add an account manager for a company and enter a **Product Group**, **Sector** and/or **Business Area** in the account manager record, the corresponding account manager (in the appropriate **Country**) is transferred automatically from the **Allocation** info area and entered in the **Account Manager** field.

Note: Note: Reps are re-allocated to customers each time one of these fields is edited in the Account Manager info area. If conflicting records are present, the allocation that was first valid based on the fields entered is used.

Account managers can be assigned and updated **automatically**. To do so, assign companies and persons to a business area, and assign the business area to an account manager.

Business Lines

Use the **Business Line** info area (not available by default in Aurea CRM web) to allocate companies and persons to a business area. Use the **Specialization** field to further limit the business line for persons (e.g. "Practice" company type and specialization "Sports doctor").

When automatically assigning account managers, Aurea CRM checks for matching records in the **Business Line** info area based on the **Allocation Code** field in the **Person** info area. The **Allocation code** can be entered using a trigger in the **Person** info area.

Account managers are assigned to companies instead of persons if only the **Business Area** and **Co. Type** are entered. If you also enter data in the **Specialty** or **Allocation Code** fields, the account manager is allocated to persons (PE/KP).

Enter a **Person type** and leave the **Co. Type** empty to add account managers for persons (PE).

The following table lists available fields:

Business Line fields	Data required to write to Company (FI)	Data required to write to Person (PE)	Data required to write to Person in Company (KP)
Co. Type	entered or empty	empty	entered or empty
Person type	empty	entered	empty
Specialization	empty	entered or empty	optional
Allocation Code	empty	empty	optional
Business Area	entered	entered	entered
	An account managers is added or updated (provided the Manual check box is disabled) for all companies where a matching Co. Type is entered (including empty). The Business Area is entered in the account manager record.	An account managers is added or updated (provided the Manual check box is disabled) for all persons (PE) where a matching Person type and Specialization are entered. The Business Area is entered in the account manager record.	An account managers is added or updated (provided the Manual check box is disabled) for all persons in company (KP) where a matching Co. Type (including empty), Specialization or Allocation Code (one of the fields must contain data) is entered. The Business Area is entered in the account manager record.

If the **Co. Type** field is empty, only companies where the **Co. Type** field is empty are taken into account.

If you add a person (PE) as a contact person (CP) at a company, account managers are added as for a person in company (KP) record.

If you change a person in company (KP) record's specialization, all contact persons (CP) and person in company (KP) records linked to the corresponding person (PE) record are updated.

Allocation

Use the **Allocation** info area (not available in the default version of Aurea CRM web) to determine which account managers are responsible for a country, business area, postal code range and block number range.

You can further subdivide block number or postal code ranges. In this case, the smallest range is used.

Example: Sam Shine is responsible for the post codes from "75001-75020", but Warren Teed is responsible for "75010-75013". Consequently, a company with the post code "75012" is assigned to Warren Teed.

The geographic block number allocations take precedence over postal codes, and postal codes are ignored if block numbers have been entered for a company/person.

If you enter account managers manually, and want to assign an account manager in the **Allocation** info area, you do not need to enter data in all three of the **Product Group**, **Sector** and **Business Area** fields. Only values that have been entered are compared.

You can allocate up to 11 reps:

Allocation	Account Manager	Company/Person
Rep 1	Account Manager	Rep
Rep 2	District Manager	
Rep 3	Head of Sales	
Rep 4	Sales Manager	
Rep 5	Key Account Int.	
Rep 6	Key Account Nat.	
Rep 7	Key Account Reg.	
Rep 8	Key Account Track	
Rep 9	Office Rep	Office Rep
Rep 10	Sales Promoter	
Rep 11	Rep	

Allocating Reps

Account managers can be allocated automatically using the settings defined in the **Account Manager** info area in several ways:

- By selecting **Allocate** from the context menu in the **Business Line** info area in Aurea CRM win. All companies and persons are then tested.
- By adding new companies and persons
- Whenever a company or person is added or edited (the **Co.Type**, address and block fields in a company record, the **Spec. 1** to **Spec. 5** and **Allocation Code** fields in a person record (KP/CP)).

Note: Note: You can enter multiple company types for a company, and multiple specializations for a person. As a result, multiple account manager records are added.

The system checks the following:

- Whether a record exists in the **Business Line** info area where the **Co.Type** and/or **Specialization** and **Allocation Code** fields are the same as in the person or company record.
- Whether a record exists in the **Allocation** info area for the same country and where the block number or postal code ranges match the data entered for the company or person.
- Whether the business area in the allocation record matches the business area in the business line record.

If **all three of the above conditions** are met, an account manager record is automatically added using the rep entered in the allocation record for the business area.

If you restructure your sales team, you only need to update the entries in the **Allocation** and **Business Line** info areas, and select the **Allocate** from the context menu in the **Business Line** info area in Aurea CRM win to apply the changes to the account managers allocated to all the affected companies and persons.

You can also add or delete records to change the allocation criteria or add territories.

Note: Account managers added or edited manually (i.e. the **Manual** field is enabled) are not updated. Reps can also be allocated using a To-Do (type 5), see [To-Do Types](#) in the *CRM.core Administrator Guide*.

Several account manager records may be added for a company or person, for example if several specializations are entered for a person, meaning that reps from various business areas may be required. If multiple reps are entered in a record in the **Allocation** info area, they are transferred to the account manager record.

Route Planning

In addition to the support activities, there are two ways to plan routes for activities:

- Using the **Ranking** field (which determine the order in which activities are generated automatically).
- Using the **Route-No.** and **RO_INo.** fields and the **Route** info area.

Ranking and route fields are present in the Person, Account Manager and Activity info areas. When generating activities, you can specify whether you wish to use the data in the Person or Account Manager info areas.

The following differences exist between the two:

	Sort Order	Rep Taken From	Persons Assigned to Routes
Ranking	Ranking	Person or Account Manager	Using selections in Aurea CRM win
Routes	RO_INo.	Person or Account Manager	Choosing the route, or using selection (Aurea CRM win)

Adding Routes

To add a route:



1. Add a new record in the **Route** info area ( (**Collaboration**) > **Routes**).

Routes are uniquely identified by the rep (**Rep ID**) and the route number (**RO_INo.**).

2. Enter the **Route-No**, **RO_INo.** (route record serial number) and the rep in the person records. The route serial number determines the order within a route. A person is assigned to a route using the rep (**Rep ID**, assuming no account manager exists) and the route number.

Adding a Person to Multiple Routes

You can only enter a single route in the **Person** info area. If you want to add a person to several routes, use the **Account Manager** info area. You can enter various routes in separate account manager records for the same person or select the desired route by double-clicking on the **Route-No.** field.

Adding Account Managers

You manually or automatically add account managers in the **Account Manager** info area.

To add an account manager manually, switch to the desired company and select **Go to All Related > All Account Managers** from the context menu. Start the search and click on **+ (New)**.

The **Manual** field is automatically enabled for records that are added manually. If an account manager record is added automatically, the **Manual** field is enabled automatically if the record is subsequently edited. The route and support fields are an exception; these fields can be edited without the **Manual** field being enabled.

Allocating Account Managers

As a rule, account managers are allocated based on a customer's address. Reps are assigned to geographical areas in the **City** info area and for postal code ranges.

You can also use the **From Block No.** and **To Block No.** fields in the **Allocation** info area. Several records can be added and different account managers allocated for identical postcodes but different block numbers. The **Block No.** entered in the company or person record is compared to the block range entered here. If a block number is entered, the postal code is **ignored**, even if no matching allocation record is found for the block number.

When entering a postal code, access is required to the City info area in order to access the data there. For further details, see [City info area](#) in *CRM.core Administrator Guide*.

When adding (or editing) company records, the system checks whether reps have been entered in the appropriate record in the **City** and **Allocation** info areas. If a **Rep** and/or **Office Rep** are entered in the **City** info area, they are entered in the **Rep ID** and **Office Rep ID** fields in the company. If matching entries are found in both the **City** and **Allocation** info areas, the data in the **Allocation** info area is used.

Your administrator can prevent reps from being transferred from the City info areas by using the Disconnect Fields from City Table (City Table category) and Disconnect Fields from Country Table (Country Table category) in the [Configuration info area](#) in *CRM.core Administrator Guide*.

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If you manually add a company of account manager record, account managers are transferred from the Allocation info area as follows:

- Transferred to company records:

If the **Product Group**, **Sector** and **Business Area** fields are empty.

If you add a new company, the system searches for an account manager in the Allocation info area allocated to the company's address. The account manager is automatically entered in the **Rep** field in the company record.

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When automatically assigning account managers, Aurea CRM checks for matching records in the **Business Line** info area based on the **Allocation Code** field in the **Person** info area. The **Allocation code** can be entered using a trigger in the **Person** info area.

Account managers are assigned to companies instead of persons if only the **Business Area** and **Co. Type** are entered. If you also enter data in the **Specialty** or **Allocation Code** fields, the account manager is allocated to persons (PE/KP).

Enter a **Person type** and leave the **Co. Type** empty to add account managers for persons (PE).

The following table lists available fields:

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Business Line fields	Data required to write to Company (FI)	Data required to write to Person (PE)	Data required to write to Person in Company (KP)
Business Area	entered	entered	entered
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If the **Co. Type** field is empty, only companies where the **Co. Type** field is empty are taken into account.

If you add a person (PE) as a contact person (CP) at a company, account managers are added as for a person in company (KP) record.

If you change a person in company (KP) record's specialization, all contact persons (CP) and person in company (KP) records linked to the corresponding person (PE) record are updated.

Allocation

Use the **Allocation** info area (not available in the default version of Aurea CRM web) to determine which account managers are responsible for a country, business area, postal code range and block number range.

You can further subdivide block number or postal code ranges. In this case, the smallest range is used.

Example: Sam Shine is responsible for the post codes from "75001-75020", but Warren Teed is responsible for "75010-75013". Consequently, a company with the post code "75012" is assigned to Warren Teed.

The geographic block number allocations take precedence over postal codes, and postal codes are ignored if block numbers have been entered for a company/person.

If you enter account managers manually, and want to assign an account manager in the **Allocation** info area, you do not need to enter data in all three of the **Product Group**, **Sector** and **Business Area** fields. Only values that have been entered are compared.

You can allocate up to 11 reps:

Allocation	Account Manager	Company/Person
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Rep 7	Key Account Reg.	
Rep 8	Key Account Track	
Rep 9	Office Rep	Office Rep
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Allocating Reps

Account managers can be allocated automatically using the settings defined in the **Account Manager** info area in several ways:

- By selecting **Allocate** from the context menu in the **Business Line** info area in Aurea CRM win. All companies and persons are then tested.
- By adding new companies and persons
- Whenever a company or person is added or edited (the **Co.Type**, address and block fields in a company record, the **Spec. 1** to **Spec. 5** and **Allocation Code** fields in a person record (KP/CP)).

Note: Note: You can enter multiple company types for a company, and multiple specializations for a person. As a result, multiple account manager records are added.

The system checks the following:

- Whether a record exists in the **Business Line** info area where the **Co.Type** and/or **Specialization** and **Allocation Code** fields are the same as in the person or company record.
- Whether a record exists in the **Allocation** info area for the same country and where the block number or postal code ranges match the data entered for the company or person.
- Whether the business area in the allocation record matches the business area in the business line record.

If **all three of the above conditions** are met, an account manager record is automatically added using the rep entered in the allocation record for the business area.

If you restructure your sales team, you only need to update the entries in the **Allocation** and **Business Line** info areas, and select the **Allocate** from the context menu in the **Business Line** info area in Aurea CRM win to apply the changes to the account managers allocated to all the affected companies and persons.

You can also add or delete records to change the allocation criteria or add territories.

Note: Account managers added or edited manually (i.e. the **Manual** field is enabled) are not updated. Reps can also be allocated using a To-Do (type 5), see [To-Do Types](#) in the *CRM.core Administrator Guide*.

Several account manager records may be added for a company or person, for example if several specializations are entered for a person, meaning that reps from various business areas may be required. If multiple reps are entered in a record in the **Allocation** info area, they are transferred to the account manager record.

Note: You can enter visit and telephone frequencies in Aurea CRM win that can be used to automatically generated activities relating to support tasks over a specific time period.

Business Lines

Use the **Business Line** info area (not available by default in Aurea CRM web) to allocate companies and persons to a business area. Use the **Specialization** field to further limit the business line for persons (e.g. "Practice" company type and specialization "Sports doctor").

When automatically assigning account managers, Aurea CRM checks for matching records in the **Business Line** info area based on the **Allocation Code** field in the **Person** info area. The **Allocation code** can be entered using a trigger in the **Person** info area.

Account managers are assigned to companies instead of persons if only the **Business Area** and **Co. Type** are entered. If you also enter data in the **Specialty** or **Allocation Code** fields, the account manager is allocated to persons (PE/KP).

Enter a **Person type** and leave the **Co. Type** empty to add account managers for persons (PE).

The following table lists available fields:

Business Line fields	Data required to write to Company (FI)	Data required to write to Person (PE)	Data required to write to Person in Company (KP)
Co. Type	entered or empty	empty	entered or empty
Person type	empty	entered	empty
Specialization	empty	entered or empty	optional
Allocation Code	empty	empty	optional
Business Area	entered	entered	entered
	An account managers is added or updated (provided the Manual check box is disabled) for all companies where a matching Co.Type is entered (including empty). The Business Area is entered in the account manager record.	An account managers is added or updated (provided the Manual check box is disabled) for all persons (PE) where a matching Person type and Specialization are entered. The Business Area is entered in the account manager record.	An account managers is added or updated (provided the Manual check box is disabled) for all persons in company (KP) where a matching Co.Type (including empty), Specialization or Allocation Code (one of the fields must contain data) is entered. The Business Area is entered in the account manager record.

If the **Co. Type** field is empty, only companies where the **Co. Type** field is empty are taken into account.

If you add a person (PE) as a contact person (CP) at a company, account managers are added as for a person in company (KP) record.

If you change a person in company (KP) record's specialization, all contact persons (CP) and person in company (KP) records linked to the corresponding person (PE) record are updated.

Allocation

Use the **Allocation** info area (not available in the default version of Aurea CRM web) to determine which account managers are responsible for a country, business area, postal code range and block number range.

You can further subdivide block number or postal code ranges. In this case, the smallest range is used.

Example: Sam Shine is responsible for the post codes from "75001-75020", but Warren Teed is responsible for "75010-75013". Consequently, a company with the post code "75012" is assigned to Warren Teed.

The geographic block number allocations take precedence over postal codes, and postal codes are ignored if block numbers have been entered for a company/person.

If you enter account managers manually, and want to assign an account manager in the **Allocation** info area, you do not need to enter data in all three of the **Product Group**, **Sector** and **Business Area** fields. Only values that have been entered are compared.

You can allocate up to 11 reps:

Allocation	Account Manager	Company/Person
Rep 1	Account Manager	Rep
Rep 2	District Manager	
Rep 3	Head of Sales	
Rep 4	Sales Manager	
Rep 5	Key Account Int.	
Rep 6	Key Account Nat.	
Rep 7	Key Account Reg.	

Rep 8	Key Account Track	
Rep 9	Office Rep	Office Rep
Rep 10	Sales Promoter	
Rep 11	Rep	

Allocating Reps

Account managers can be allocated automatically using the settings defined in the **Account Manager** info area in several ways:

- By selecting **Allocate** from the context menu in the **Business Line** info area in Aurea CRM win. All companies and persons are then tested.
- By adding new companies and persons
- Whenever a company or person is added or edited (the **Co.Type**, address and block fields in a company record, the **Spec. 1** to **Spec. 5** and **Allocation Code** fields in a person record (KP/CP)).

Note: Note: You can enter multiple company types for a company, and multiple specializations for a person. As a result, multiple account manager records are added.

The system checks the following:

- Whether a record exists in the **Business Line** info area where the **Co.Type** and/or **Specialization** and **Allocation Code** fields are the same as in the person or company record.
- Whether a record exists in the **Allocation** info area for the same country and where the block number or postal code ranges match the data entered for the company or person.
- Whether the business area in the allocation record matches the business area in the business line record.


If **all three of the above conditions** are met, an account manager record is automatically added using the rep entered in the allocation record for the business area.

If you restructure your sales team, you only need to update the entries in the **Allocation** and **Business Line** info areas, and select the **Allocate** from the context menu in the **Business Line** info area in Aurea CRM win to apply the changes to the account managers allocated to all the affected companies and persons.

You can also add or delete records to change the allocation criteria or add territories.

Note: Account managers added or edited manually (i.e. the **Manual** field is enabled) are not updated, >> on page 243.Reps can also be allocated using a To-Do (type 5), >> *To-Do Types* in the CRM.core Administrator Guide.

Several account manager records may be added for a company or person, for example if several specializations are entered for a person, meaning that reps from various business areas may be required. If multiple reps are entered in a record in the **Allocation** info area, they are transferred to the account manager record.

	<p>Note: You can enter visit and telephone frequencies in Aurea CRM win that can be used to automatically generated activities relating to support tasks over a specific time period, >> <i>Generating Contacts</i> in the update.seven win Business Logic OTC Manual.</p>
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Route Planning

In addition to the support activities, there are two ways to plan routes for activities:

- Using the **Ranking** field (which determine the order in which activities are generated automatically).
- Using the **Route-No.** and **RO_INo.** fields and the **Route** info area.


Ranking and route fields are present in the Person, Account Manager and Activity info areas. When generating activities, you can specify whether you wish to use the data in the Person or Account Manager info areas.

The following differences exist between the two:

	Sort Order	Rep Taken From	Persons Assigned to Routes
Ranking	Ranking	Person or Account Manager	Using selections in Aurea CRM win
Routes	RO_INo.	Person or Account Manager	Choosing the route, or using selection (Aurea CRM win)

Adding Routes

To add a route:

1. Add a new record in the **Route** info area ( **(Collaboration) > Routes**).

Routes are uniquely identified by the rep (**Rep ID**) and the route number (**RO_INo.**).


2. Enter the **Route-No**, **RO_INo.** (route record serial number) and the rep in the person records. The route serial number determines the order within a route. A person is assigned to a route using the rep (**Rep ID**, assuming no account manager exists) and the route number.

Adding a Person to Multiple Routes

You can only enter a single route in the **Person** info area. If you want to add a person to several routes, use the **Account Manager** info area. You can enter various routes in separate account manager records for the same person or select the desired route by double-clicking on the **Route-No.** field.

Adding Routes

To add a route:

1. Add a new record in the **Route** info area ( (**Collaboration**) > **Routes**).
Routes are uniquely identified by the rep (**Rep ID**) and the route number (**RO_INo.**).
2. Enter the **Route-No**, **RO_INo.** (route record serial number) and the rep in the person records. The route serial number determines the order within a route. A person is assigned to a route using the rep (**Rep ID**, assuming no account manager exists) and the route number.

Adding a Person to Multiple Routes

You can only enter a single route in the **Person** info area. If you want to add a person to several routes, use the **Account Manager** info area. You can enter various routes in separate account manager records for the same person or select the desired route by double-clicking on the **Route-No.** field.

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Inventory Management

Inventory Management Overview

Learn how to manage your items and products using Inventory management. Here the info areas and functions involved are described without dictating a fixed approach to inventory management.

Outgoing items can be deducted from stocks in the "central warehouse" (an external ERP system).

Inventory management in Aurea CRM provides the following functions:

- Each rep can manage company-independent stocks for each item and lot.
- Stock movements are stored in the **Stock Control** info area (e.g. receiving goods, returns, losses etc.).
- When adding **orders, offers, samples, refunds and promotional material**, you can enter details on how items affect stocks.
- The number of items in reps' stocks are automatically calculated in the **Stock** info area based on the information entered in stock control, order, sample, refunding and promotional material records, such as which lot an item is taken from and what quantity.
- You can define various transaction types (e.g. order, return, delivery, loss etc.) for orders, refunds and stocks control records, which determine how stocks are affected: For each type, you can determine whether items are added to or removed from stocks, and whether quantities are specified in units or packaging units.
- You can assign stocks to **SAP company codes** in the **SAP Company Code** info area for use with SAP.

When stocktaking, data that affects stocks (in order, sample, refunding, promotional material or stock control records) is aggregated for reps, stocks, lots and items. The results are written to the **Stock Control** info area.

During stock-taking, stock-relevant data in existing orders is taken into account. 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.

Administrator Information

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.

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 **enabled by default**. If you do **not** wish to use Aurea CRM's inventory management features, your administrator can deactivate the "Stock Calculation" process in the Process configuration info area.
- 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** .
- 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. Alternatively, you can disable Aurea CRM's stock management features across the entire system by locking the "Stock Calculation" 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).

Stock

Use the Stock info area (not available in the default version of Aurea CRM web) 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.

Based on stock-effective stock control item, order item, refunding item and promotional material records, Aurea CRM automatically adds stock records for each rep, stock, lot and item. Each time stocks are affected by a transaction, the corresponding number of units are added or subtracted.

Items can also be distributed without affecting stocks, in which case the rep's stock remains unchanged.

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-effective records are added/subtracted in units.
- **Target number of packs:** Number of packages available (**Quantity Unit / Pack. Unit**)
- **Target remainder units:** Number of remainder units available according to the database (**Quantity Unit - (Packaging Unit * Target number of packs)**)

Use the **No Restricts.** (no restrictions) and **Negative stock allowed** (negative stocks allowed) fields to determine how the system behaves if stocks are exceeded.

To use the automatic stock calculation functions, for example when adding orders, enter the following data in the order:

- **Rep** or **Rep ID:** The rep whose stocks are affected. By default, you are automatically entered.
- **Stock:** The stock from which items are deducted.
- **Receipt Type** or **Quantity factor.**
- The **Currency.**

The items and quantities are entered in the **Order Item** info area. Enter the following details:

- **Item No.:** The **Item name, Sector, Product Group, Brand, Grade** and **Packaging Unit** are entered automatically.
- **Quantity:** You can also enter a lot number in the **Lot No.** field. The stock-effective quantity is calculated automatically based on the **Quantity factor** (in the order) and **Pack. Unit** and entered in the **Inventory quantity** field.

The corresponding stock is automatically updated in the **Stock** info area.

Note: Offers do **not** affect stocks. However, you can enter information on how items impact stocks when adding an offer (**Stock, Receipt Type, Quantity factor, SAP Company Code** in offers; **Pack. Unit** in offer items). This information is then transferred to the order and order items when creating an order from an offer by selecting Copy to Order from the context menu , and is consequently taken into account when calculating stocks.

Assigning Stocks to an SAP Company Code

You can assign each stock to an SAP company code in the SAP Company Code info area when integrating Aurea CRM with SAP. You can assign multiple stocks to the same company code.

If you then select a stock, the corresponding **SAP Company Code** is entered. The SAP company code is entered automatically in the following info areas:

- **Offer**
- **Order**
- **Stock**
- **Stock Control**

- **Promotional Material**
- **Refunding**

Records with no Effect on Stocks

You can flag order items, stock control items, refunding items, samples and promotional material as having no effect on stocks (**Entered in Inventory** enabled). Records where this option is enabled are ignored when calculating stocks and when stocktaking.

- You can enable or disable the check box as required in order item, stock control item, refunding items sample and promotional material records.
- Once stock-taking has been performed for order item, stock control item, refunding items sample and promotional material records (**Stocktaking** and **Reset** options), the **Entered in Inventory** field is automatically enabled.
- Stock control items added during stocktaking (**Count** and **Calculate** options) are also flagged as having no effect on stocks.

Exceeding Stocks

For each stock, you can use the **No Restricts.** and **Negative stock allowed** allowed fields to determine how Aurea CRM handles cases where stocks are exceeded.

No Restricts. and **Neg.stock allowed** enabled: Aurea CRM ignores cases where stocks are exceeded, and stocks may be negative.

No Restricts. 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 Restricts.** and **Negative stock allowed** disabled: Aurea CRM displays a corresponding message and the record cannot be saved.

Overview

Inventory management in Aurea CRM provides the following functions:

- Each rep can manage company-independent stocks for each item and lot.
- Stock movements are stored in the **Stock Control** info area (e.g. receiving goods, returns, losses etc.).
- When adding **orders, offers, samples, refunds and promotional material**, you can enter details on how items affect stocks.
- The number of items in reps' stocks are automatically calculated in the **Stock** info area based on the information entered in stock control, order, sample, refunding and promotional material records, such as which lot an item is taken from and what quantity.
- You can define various transaction types (e.g. order, return, delivery, loss etc.) for orders, refunds and stocks control records, which determine how stocks are

affected: For each type, you can determine whether items are added to or removed from stocks, and whether quantities are specified in units or packaging units.

- You can assign stocks to **SAP company codes** in the **SAP Company Code** info area for use with SAP.

When stocktaking, data that affects stocks (in order, sample, refunding, promotional material or stock control records) is aggregated for reps, stocks, lots and items. The results are written to the **Stock Control** info area.

During stock-taking, stock-relevant data in existing orders is taken into account. 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.

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 **enabled by default**. If you do **not** wish to use Aurea CRM's inventory management features, your administrator can deactivate the "Stock Calculation" process in the **Process configuration** info area, >> Process Configuration in the 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**, >> CRM.core 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 "Stock Calculation" 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.

Stock

Use the **Stock** info area (not available in the default version of Aurea CRM web) 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.

Based on stock-effective stock control item, order item, refunding item and promotional material records, Aurea CRM automatically adds stock records for each rep, stock, lot and item. Each time stocks are affected by a transaction, the corresponding number of units are added or subtracted.

Items can also be distributed without affecting stocks, in which case the rep's stock remains unchanged, >> on page 256.

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-effective records are added/subtracted in units.
- **Target number of packs:** Number of packages available (**Quantity Unit / Pack. Unit**)
- **Target remainder units:** Number of remainder units available according to the database (**Quantity Unit - (Packaging Unit * Target number of packs)**)

Use the **No Restricts.** (no restrictions) and **Negative stock allowed** (negative stocks allowed) fields to determine how the system behaves if stocks are exceeded, >> on page 256.

To use the automatic stock calculation functions, for example when adding orders, enter the following data in the order:

- **Rep** or **Rep ID:** The rep whose stocks are affected. By default, you are automatically entered.
- **Stock:** The stock from which items are deducted.
- **Receipt Type** or **Quantity factor**, >> on page 255.
- The **Currency**.

The items and quantities are entered in the **Order Item** info area. Enter the following details:

- **Item No.:** The **Item name**, **Sector**, **Product Group**, **Brand**, **Grade** and **Packaging Unit** are entered automatically.
- **Quantity:** You can also enter a lot number in the **Lot No.** field. The stock-effective quantity is calculated automatically based on the **Quantity factor** (in the order) and **Pack. Unit** and entered in the **Inventory quantity** field.

The corresponding stock is automatically updated in the **Stock** info area.

Note: Note: Offers do **not** affect stocks. However, you can enter information on how items impact stocks when adding an offer (**Stock**, **Receipt Type**, **Quantity factor**, **SAP Company Code** in offers; **Pack. Unit** in offer items). This information is then transferred to the order and order items when creating an order from an offer by selecting Copy to Order from the context menu (>> on page 193), and is consequently taken into account when calculating stocks.

Inventory Management

Learn how to manage goods storage using Stock Control.

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 and their lot number are stored in stock control item records.

Stock Control Central Warehouse - Chris Aki

Menu | Edit | Save | Cancel | Print

Stock Central Warehouse	Rep ID <u>Chris Aki</u>
Date 12.02.2013	Desired Deliv. Date
Day Of Delivery 1	Day Of Delivery 2
Stock Receipt Type Replacement	Delivery Note No.
No. Items	Number of inventory-effective items

Details

SAP Company Code	Sales Org.(C)
Sales Channel (C)	Division(C)
Quantity factor + Pack.Unit	Priv. Use Reason
SAP No.	SAP Date
Comment	

Switch to the **Stock Control** info area and add a new record.

1. Enter the rep (**Rep ID**) that the record applies to. By default, you are automatically entered.
2. Select the **Stock** that the record applies to.
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.

Note: Based on the information in the **Stock Control** and **Stock Control Item** info areas, Aurea CRM automatically adds records for each rep, stock, lot and item to the **Stock** info area, with the corresponding number of units being subtracted or added each time a change is made.

Stock Control Items

If you remove items from the stock or return them, you need to add a stock control item to the stock control record. You can also enter quantities per lot (**Lot No.** field).

You can either add stock control items directly or select **Quick Add (Items)** from the context menu to use the quick add function.

To add a stock control item record:

1. Switch to the desired record in the **Stock Control** info area.
2. Select **Stock Control Items** from the context menu.
3. Start the search.
4. Click on **+** (**New**).

New: Stock Control Item

✓ Save

Item No.	1234	Q X		
Item name	IND 30mg			
Sector	Own Product	+ v	Prod. Cat.	Cardio-vascular
Brand	Indramal	+ v	Grade	Tablet

Details

Quantity	5	Inventory quantity	
Packaging Unit		Pack. Unit Name	
Entered in Inventory	<input type="checkbox"/>	Inventory No.	
Lot No.			
Text			

5. Enter the **Item No.** or click on **Q** (**Select**) to select an item. The **Item Name**, **Sector**, **Product Group**, **Brand**, **Grade** and **Packaging Unit** are entered automatically.
6. Enter the item's quantity in the **Quantity** field to determine the amount to be added or removed from the stock.

If either +Pack. Unit or -Pack.Unit is entered as the quantity factor in the parent stock control record, the quantity by which stocks are affected (**Inventory quantity**) is calculated based on the size of a packaging unit. The **Packaging Unit** is transferred from the **Item Master** info area or can be entered manually.

7. Save.

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

Stock Control Items

If you remove items from the stock or return them, you need to add a stock control item to the stock control record. You can also enter quantities per lot (**Lot No.** field).

You can either add stock control items directly or select **Quick Add (Items)** from the context menu to use the quick add function, >> on page 104.

To add a stock control item record:

1. Switch to the desired record in the **Stock Control** info area.
2. Select **Stock Control Items** from the context menu.
3. Start the search.
4. Click on **+** (**New**).

New: Stock Control Item

✓ Save

Item No. 🔍 ✕

Item name

Sector + ▼ Prod.Cat.

Brand + ▼ Grade

Details

Quantity Inventory quantity

Packaging Unit Pack. Unit Name

Entered in Inventory Inventory No.

Lot No.

Text

5. Enter the **Item No.** or click on **🔍 (Select)** to select an item.

The **Item Name**, **Sector**, **Product Group**, **Brand**, **Grade** and **Packaging Unit** are entered automatically.

6. Enter the item's quantity in the **Quantity** field to determine the amount to be added or removed from the stock.

If either +Pack. Unit or -Pack.Unit is entered as the quantity factor in the parent stock control record, the quantity by which stocks are affected (**Inventory quantity**) is calculated based on the size of a packaging unit. The **Packaging Unit** is transferred from the **Item Master** info area or can be entered manually.

7. Save.

Aurea CRM automatically adds a stock record to the **Stock** info area for this item and lot (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, refunding items and order items affect stocks.

You can assign specific quantity factors to records in the **Stock Transaction Type** and **Receipt Transaction Type** info areas.

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. The **- Qty:** quantity factor is **always** used for samples and promotional material. Enter negative numbers in samples to determine that the quantity entered in this field is added to the stock (if samples are returned).Quantities are always entered as units.

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 delivered" 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**, **Refunding** 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'.

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.

Assigning Quantity Factors to Receipt Transaction Types

You can assign a quantity factor to the default transaction types in the **Receipt Type Calculation** info area. This info area is otherwise identical in function to the **Stock Receipt Type** info area.

You can define receipt types per **Sales Channel (C)** in the **Receipt Transaction Type** info area. This field is only relevant to SAP integration.

The **Quantity factor** and **Sales Channel (C)** are automatically entered in orders and refunds if a **Receipt Type** is selected. Packaging units are entered in the item master and transferred to item records once an item is selected.

Note: The - Qty: quantity factor is **always** used for samples and promotional material. Quantities are always entered as units.

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.

Assigning Quantity Factors to Receipt Transaction Types

You can assign a quantity factor to the default transaction types in the **Receipt Type Calculation** info area. This info area is otherwise identical in function to the **Stock Receipt Type** info area, >> on page 255.

You can define receipt types per **Sales Channel (C)** in the **Receipt Transaction Type** info area. This field is only relevant to SAP integration.

The **Quantity factor** and **Sales Channel (C)** are automatically entered in orders and refunds if a **Receipt Type** is selected. Packaging units are entered in the item master and transferred to item records once an item is selected.

Note: Note: The - **Qty:** quantity factor is **always** used for samples and promotional material. Quantities are always entered as units.

Assigning Stocks to an SAP Company Code

You can assign each stock to an SAP company code in the **SAP Company Code** info area when integrating Aurea CRM with SAP. You can assign multiple stocks to the same company code.

If you then select a stock, the corresponding **SAP Company Code** is entered. The SAP company code is entered automatically in the following info areas:

- **Offer**
- **Order**
- **Stock**
- **Stock Control**
- **Promotional Material**
- **Refunding**

Records with no Effect on Stocks

You can flag order items, stock control items, refunding items, samples and promotional material as having no effect on stocks (**Entered in Inventory** enabled).

Records where this option is enabled are ignored when calculating stocks and when stocktaking, >> on page 250 and on page 257.

- You can enable or disable the check box as required in order item, stock control item, refunding items sample and promotional material records.
- Once stock-taking has been performed for order item, stock control item, refunding items sample and promotional material records (**Stocktaking** and **Reset** options), the **Entered in Inventory** field is automatically enabled.
- Stock control items added during stocktaking (**Count** and **Calculate** options) are also flagged as having no effect on stocks, >> on page 257.

Exceeding Stocks

For each stock, you can use the **No Restricts.** and **Negative stock allowed** allowed fields to determine how Aurea CRM handles cases where stocks are exceeded.

No Restricts. and **Neg.stock allowed** enabled: Aurea CRM ignores cases where stocks are exceeded, and stocks may be negative.

No Restricts. 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 Restricts.** 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, stock control item, refunding items sample and promotional material records records that affect stocks can be totaled over a specific time period or for archiving purposes, and current stocks can be recalculated 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. 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.

When taking stock, select a stocktaking format and restrict the stock-taking time period using the **Date from** and **Date to** fields. You can also enter a **Text** that is entered in the stock control records. You can also specify the rep that stocktaking should be carried out for (not available in Aurea CRM web by default), see [To-Do Types](#) (type 4) in 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 child item records contain the calculated sum total, i.e. the stocks at the specified time. These item records are flagged as having no effect on stock (**Entered in Inventory** enabled) 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 item, stock control item, refunding item, sample and promotional material records 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, stock control item, refunding item, sample and promotional material records taken into account by the process are flagged as having no effect on stock (**Entered in Inventory** enabled); 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 records 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 (**Entered in Inventory** enabled), 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), see *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, stock control item, refunding item, sample and promotional material records taken into account by the process are flagged as having no effect on stock (**Entered in Inventory** enabled). This allows you to archive stocks: The affected stocks do not change, stock transactions are summarized in the new (stock-effective) records; "old" order, stock control, refunding, sample and promotional material 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 records 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 item, stock control item, refunding item, sample and promotional material records 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), see *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** (remainder units) 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**, >> on page 258.

The **Calculate** inventory type is purely for informational purposes. It can be used by reps on any station; the order item, stock control item, refunding item, sample and promotional material records 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.

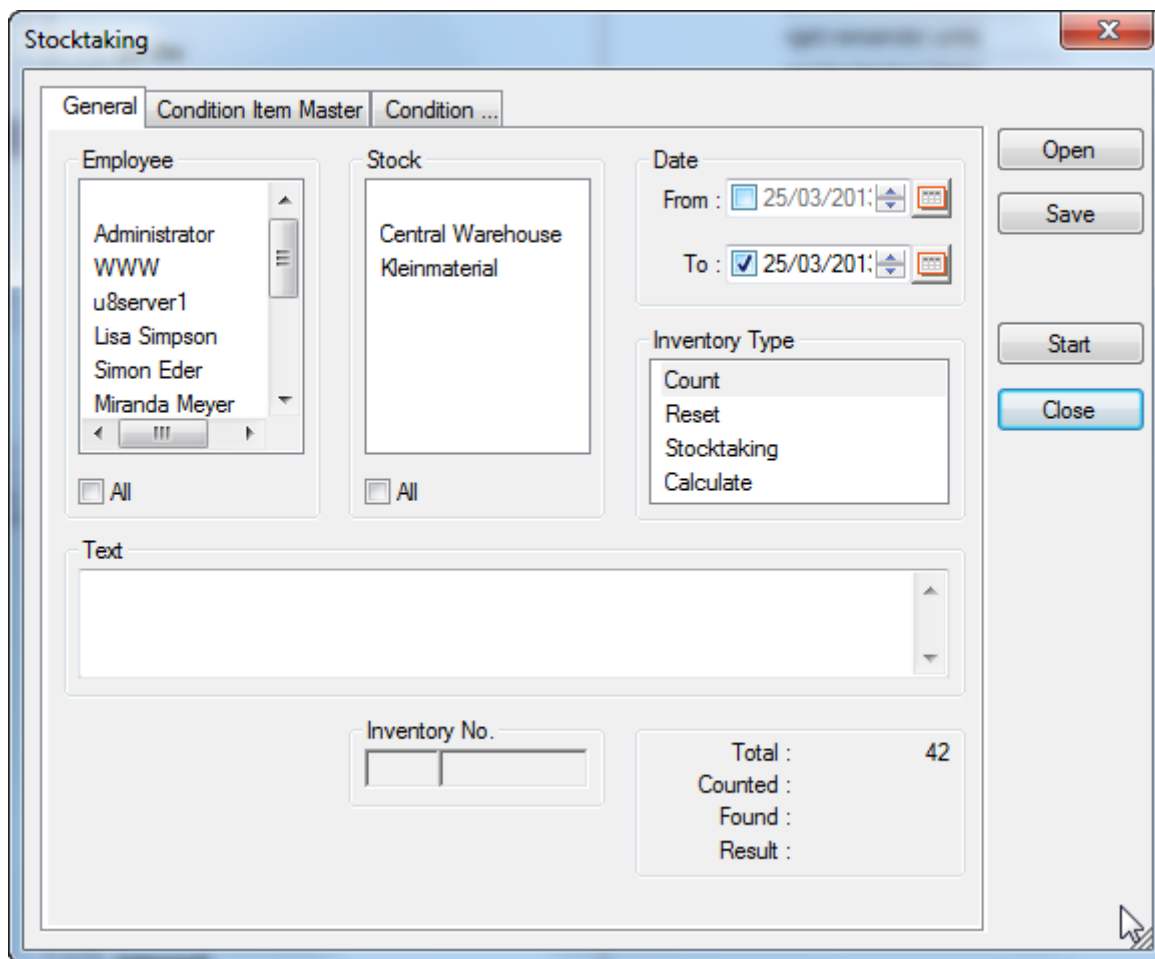
Stocktaking Format

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.
 - **Reset**: Removes the selected data from stocks.
 - **Stocktaking**: Writes stocks to stock archives.
 - **Calculate**: Recalculates stocks.

Note: 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), see [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 sectors, product groups, brands or grades: Select the desired criteria in the **Sector, Product Group, Brand, Grade** and **Item Master** list fields.
9. Use the **Condition** tab to restrict stocktaking using conditions applied to the **Order, Stock Control, Sample, Refunding** and **Promotional Material** info areas:
 - a. Click on  (**Condition**) next to the desired info area.
 - b. Define the condition, see [Conditions](#) in the Aurea CRM win User Manual.
 - c. Enable the **Active** check box to activate the condition.

Note: Note: Only conditions defined here are applied when taking stocks. Conditions applied to 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 item, stock control item, refunding item, sample and promotional material records 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. If errors occur or the system crashes while stocktaking, causing inconsistent data, the process must be reset and repeated using the **Update** info area (**Maintenance** module) to update the affected info areas (**Order Item, Stock Control Item** etc.) using the **Inventory StNo.** and **Inventory No.** fields, see *CRM.core Administrator Guide*. Stocktaking can be carried out in Aurea CRM web using **To-Dos** (type 4) assigned to CRM.server, see *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 child item records contain the calculated sum total, i.e. the stocks at the specified time. These item records are flagged as having no effect on stock (**Entered in Inventory** enabled) 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 item, stock control item, refunding item, sample and promotional material records 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, stock control item, refunding item, sample and promotional material records taken into account by the process are flagged as having no effect on stock (**Entered in Inventory** enabled); the corresponding quantities are subtracted from stocks.

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- One record for the rep that started the stocktaking process: This record's key is entered records taken into account by the stocktaking process, and any stock control items added as a result.
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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.

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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, stock control item, refunding item, sample and promotional material records taken into account by the process are flagged as having no effect on stock (**Entered in Inventory** enabled). This allows you to archive stocks: The affected stocks do not change, stock transactions are summarized in the new (stock-effective) records; "old" order, stock control, refunding, sample and promotional material records can then be archived and removed from the database.

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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** (remainder units) 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**, >> on page 258.

The **Calculate** inventory type is purely for informational purposes. It can be used by reps on any station; the order item, stock control item, refunding item, sample and promotional material records 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

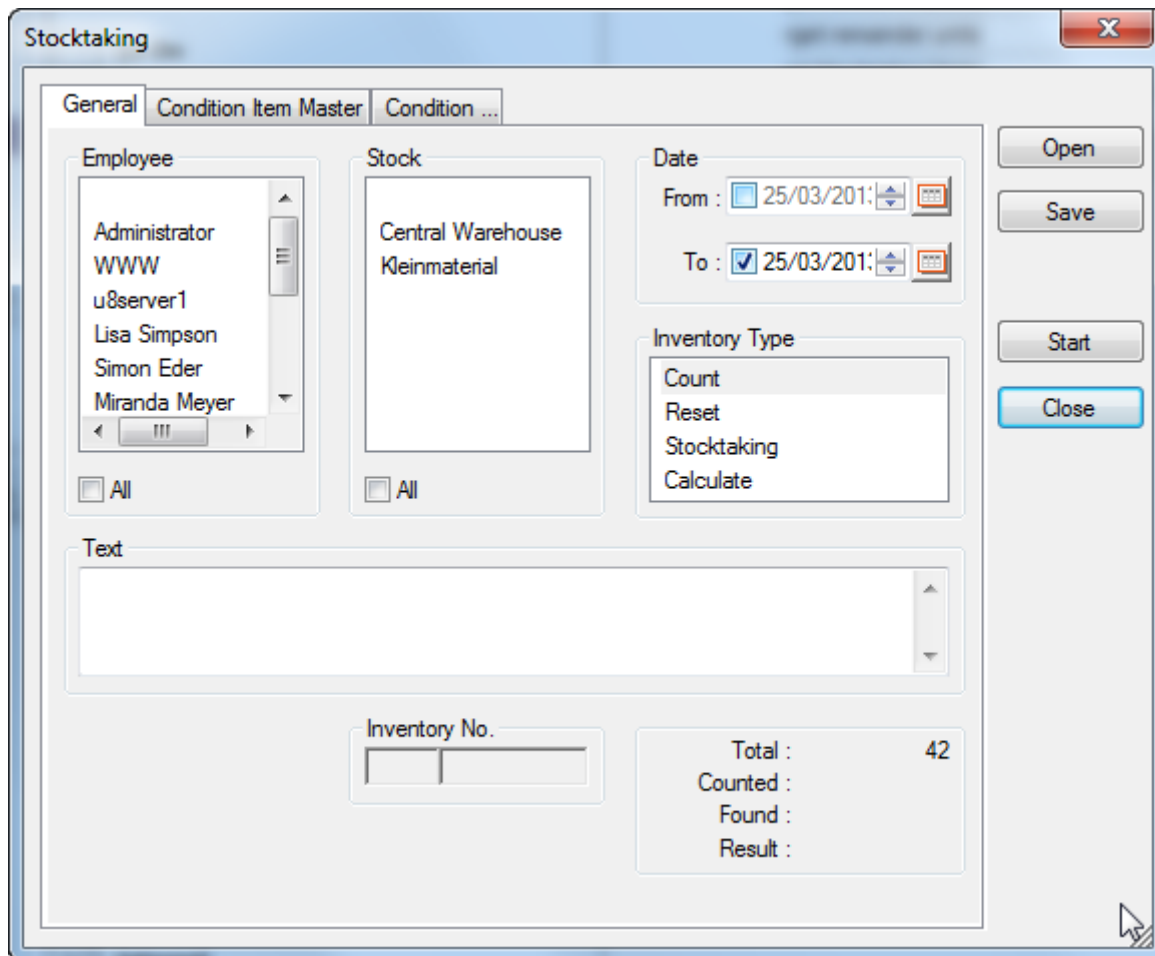


Stocktaking formats can only be created in Aurea CRM win. Define the desired settings and save the settings as a format.

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, >> on page 256.
 - **Reset**: Removes the selected data from stocks, >> on page 257.
 - **Stocktaking**: Writes stocks to stock archives, >> on page 257.
 - **Calculate**: Recalculates stocks, >> on page 257.

Note: 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 sectors, product groups, brands or grades: Select the desired criteria in the **Sector**, **Product Group**, **Brand**, **Grade** and **Item Master** list fields.
 9. Use the **Condition** tab to restrict stocktaking using conditions applied to the **Order**, **Stock Control**, **Sample**, **Refunding** and **Promotional Material** info areas:
 - a. Click on  (**Condition**) next to the desired info area.
 - b. Define the condition, >> *Conditions* in the Aurea CRM win User Manual.
 - c. Enable the **Active** check box to activate the condition.
-

Note: 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 item, stock control item, refunding item, sample and promotional material records 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.
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-

Note: Note: No new stock control records are added when using the **Calculate** inventory type, >> on page 257. If errors occur or the system crashes while stocktaking, causing inconsistent data, the process must be reset and repeated using the **Update** info area (**Maintenance** module) to update the affected info areas (**Order Item**, **Stock Control Item** etc.) 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.

24

Data for SAP Integration

Data for SAP Integration

Learn about the fields for info area required for SAP integration.

Aurea CRM provides the following fields required by SAP in the most important info areas:

Field	Info Area
SAP Company Code	Special Offer, Offer, Item Master, Order, Stock, Stock SAP Company Code, Stock Control, Company, Competition, POS Monitoring, Expenses, Refunding, Promotional Material
Sales Org.(C)	Special Offer, Item Master, Order, Stock, Stock Control, Company, Competition, POS Monitoring, Expenses, Refunding, Promotional Material
Sales Channel (C)	Special Offer, Item Master, Order, Stock, Receipt Transaction Type, Stock Control, Company, Competition, POS Monitoring, Expenses, Refunding, Promotional Material
Division(C)	Item Master, Order, Order Item, Stock, Stock Control, Stock Control Item, Company, Competition, POS Monitoring, Expenses, Refunding, Promotional Material
SAP Date	Offer, Offer Item, Order, Order Item, Receipt, Stock Control, Stock Control Item, Company, Person, Person in Company, Refunding, Refunding Item, Expenses, Promotional Material
SAP No.	Stock Control, Company
No. packs SAP	Stock
Remainder units SAP	Stock

Only two of these fields have a function in Aurea CRM:

- The **Sales Channel (C)** is entered in orders and refunds based on the transaction type.
- The **SAP Company Code** field is used in all info areas that use stocks, and is entered automatically based on the stocks.

25

Campaigns and Marketing Activities

Campaigns and Marketing Activities

Learn to plan, execute and monitor 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: Note: If you are porting campaign templates between development and production systems, ensure that the field numbers 4 and 15 in the Activity Execution (AD) record are empty. If they are not empty, then after porting, manually update field number 5, else the execution of marketing activities fails.

Marketing Calendar

To add a new campaign:

1. Select  (Marketing) > New Campaign.
2. The following options are available:
 - **Empty Campaign:** Creates a new campaign.
 - **Use Template:** Copies the data from an existing campaign template. You then need to customize the data in the new campaign:

Search for and select the desired campaign template.

The date entered in the campaign is not copied. Enter the desired date for the new campaign and click on **OK**. The campaign, including all associated marketing activities, is copied and rescheduled for the new date.

1. Enter the relevant data in the fields, including the name of the campaign, the type, the rep responsible for the campaign as a whole and the start and end date.

Campaign Christmas Promotion Campaign

Menu | Edit | Save | Cancel | Calculate | [Icons]

Camp. Type Christmas Promotion
 Camp. Name Christmas Promotion Campaign
 Resp. Rep ID Miranda Meyer Camp. Status Scheduled
 Camp. Start 16.11.2013 Camp. End 23.12.2013
 Event Location Calculation Date

Work Orders | **Points** | Approval & Verification | Mailings | Activities | Costs

Act. Total Pts. Act. Wtd. Total Pts.
 Targ. Total Pts. Targ. Wtd. Total Pts.
 Total Pts. Perc. 0,00% Wtd. Total Pts. Perc.

2. Save the record.
3. Add the marketing activities that make up the campaign.

Quick Campaigns

Quick campaigns allow you to generate a letter for several persons, without needing to first add a campaign and associated marketing activities.

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.

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. 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 are informed of which marketing activity the letter was linked to. You can click on the link in the message to open the marketing activity.


Campaigns

A campaign consists of one or more marketing activities that take place sequentially. You can also add marketing activities that are not part of a campaign.

Adding Campaigns

To add a new campaign:



1. Select  (**Marketing**) > **New Campaign**.
2. The following options are available:
 - **Empty Campaign:** Creates a new campaign.
 - **Use Template:** Copies the data from an existing campaign template. You then need to customize the data in the new campaign:

Search for and select the desired campaign template.

The date entered in the campaign is not copied. Enter the desired date for the new campaign and click on **OK**. The campaign, including all associated marketing activities, is copied and rescheduled for the new date.

1. Enter the relevant data in the fields, including the name of the campaign, the type, the rep responsible for the campaign as a whole and the start and end date.

Campaign Christmas Promotion Campaign

Menu | Edit | Save | Cancel | Calculate | HTML

Camp. Type Christmas Promotion
 Camp. Name Christmas Promotion Campaign
 Resp. Rep ID [Miranda Meyer](#) Camp. Status Scheduled
 Camp. Start 16.11.2013 Camp. End 23.12.2013
 Event Location Calculation Date

Work Orders | **Points** | Approval & Verification | Mailings | Activities | Costs

Act. Total Pts. Act. Wtd. Total Pts.
 Targ. Total Pts. Targ. Wtd. Total Pts.
 Total Pts. Perc. 0,00% Wtd. Total Pts. Perc.

2. Save the record.
3. Add the marketing activities that make up the campaign.

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.

Campaign Christmas Promotion Campaign

Export (HTML) | Export (PDF)

Christmas Promotion Campaign
 Marketing Activities

- Variation
 - Target Group
 - Responses
 - Accepted
 - Rejected
 - Reps

Search Marketing Activities linked to Campaign Christmas Promotion Campaign

Search Results << < 1 - 2 of 2 > >>

	Campaign	Marke...	Le...	Va	Ty...	Da
	Christmas Promo...					16.
	Christmas Promo...					16.

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. 📄 (Export (HTML))).

Open Campaign Issues

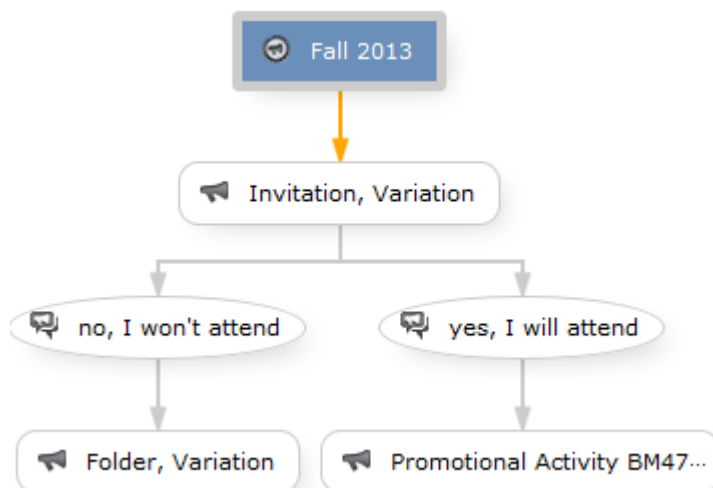
You can display important information on a campaign that concerns you.

To view open campaign issues, select 📣 (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.

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:

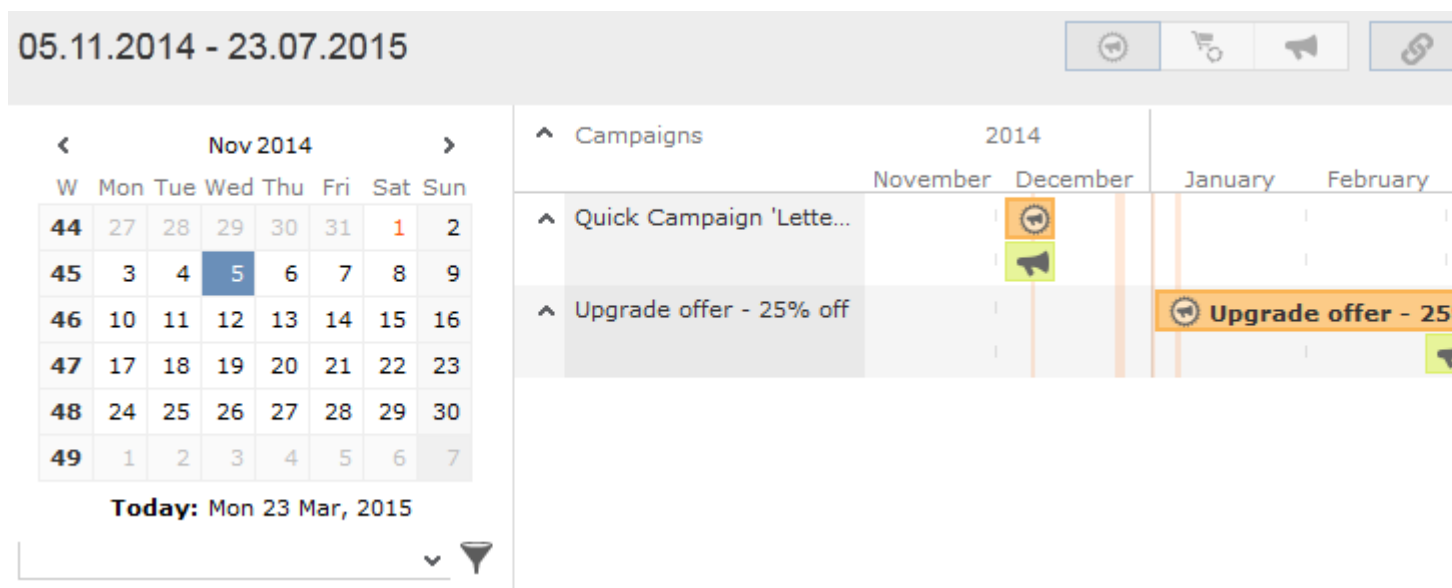
- Drag the graph to move it.
- Use your mouse wheel to zoom.
- Double-click on an empty area in the graph to revert the zoom level to 100%.
- Double-click on an element in the graph (campaign, marketing activity or response) to open the corresponding record.

Marketing Calendar

The marketing calendar is an important tool for managing campaigns. The marketing calendar displays a graphical overview of activities and campaigns including an indicator that represents a campaign or marketing activity's progress or success.

To display campaigns and marketing activities in the marketing calendar:

1. Select  (Marketing) > **Marketing Calendar**. The marketing calendar is displayed.




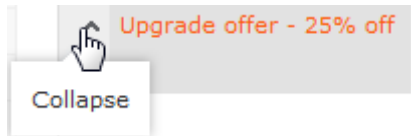
Individual elements (campaigns, sales cycles, marketing activities) are displayed as colored blocks.



Note: If no end date is entered in a marketing activity, it is displayed as lasting for a single day.

The current date is indicated by a vertical line.

You can edit and display campaigns and activities in a number of ways:

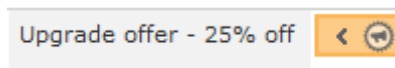
- Use the icons in the header to choose what to display:
 - : Campaigns and marketing activities
 - : Sales cycles and marketing activities
 - : Only marketing activities
- To display or hide the marketing activities that make are part of a campaign, click on ^ or v in the left-most column. Click on ^ or v in the column header to hide/show all marketing activities for all campaigns.



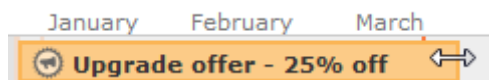
-  (**Edit Settings**): Choose whether to color-code elements by type (info area) or status.
-  (**Legend**): Displays information on the colors in the calendar
- To configure the time period that is displayed:
 - Click on the desired day or start of the time period in the small calendar in the sidebar.
 - Select the time period that is displayed using the slider in the header: drag the slider to the left or right or click on the plus and minus signs on either side to zoom in or out.




- Drag the timeline at the top of the calendar to the left 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.
- 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.

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.

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.

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5. When you close the document, you are informed of which marketing activity the letter was linked to. You can click on the link in the message to open the marketing activity.

Campaigns

Learn how to add and manage 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.

Adding Campaigns

To add a new campaign:



1. Select **(Marketing) > New Campaign**.
2. The following options are available:
 - **Empty Campaign:** Creates a new campaign.
 - **Use Template:** Copies the data from an existing campaign template. You then need to customize the data in the new campaign:

Search for and select the desired campaign template.

The date entered in the campaign is not copied. Enter the desired date for the new campaign and click on **OK**. The campaign, including all associated marketing activities, is copied and rescheduled for the new date.

1. Enter the relevant data in the fields, including the name of the campaign, the type, the rep responsible for the campaign as a whole and the start and end date.

Campaign Christmas Promotion Campaign

Menu | Edit | Save | Cancel | Calculate | [Icons]

Camp. Type Christmas Promotion
 Camp. Name Christmas Promotion Campaign
 Resp. Rep ID [Miranda Meyer](#) Camp. Status Scheduled
 Camp. Start 16.11.2013 Camp. End 23.12.2013
 Event Location Calculation Date

Work Orders | **Points** | Approval & Verification | Mailings | Activities | Costs

Act. Total Pts. Act. Wtd. Total Pts.
 Targ. Total Pts. Targ. Wtd. Total Pts.
 Total Pts. Perc. Wtd. Total Pts. Perc.

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Export (HTML) | Export (PDF)

Christmas Promotion Campaign

- Marketing Activities
 - Variation
 - Target Group
 - Responses
 - Accepted
 - Rejected
 - Reps


Search Marketing Activities linked to **Campaign Christmas Promotion Campaign**

Search Results << < 1 - 2 of 2 > >>

	Campaign	Marke...	Le...	Va	Ty...	Da
	Christmas Promo...					16.
	Christmas Promo...					16.

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.  (**Export (HTML)**)).

Open Campaign Issues

You can display important information on a campaign that concerns you.

To view open campaign issues:

1. Select  (**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.

Quick Campaigns

Quick campaigns allow you to generate a letter for several persons, without needing to first add a campaign and associated marketing activities.

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.

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. 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 are informed of which marketing activity the letter was linked to. You can click on the link in the message to open the marketing activity.

Adding Campaigns

To add a new campaign:

1. Select  (**Marketing**) > **New Campaign**.
2. The following options are available:
 - **Empty Campaign:** Creates a new campaign.
 - **Use Template:** Copies the data from an existing campaign template. You then need to customize the data in the new campaign:

Search for and select the desired campaign template.

The date entered in the campaign is not copied. Enter the desired date for the new campaign and click on **OK**. The campaign, including all associated marketing activities, is copied and rescheduled for the new date.

1. Enter the relevant data in the fields, including the name of the campaign, the type, the rep responsible for the campaign as a whole and the start and end date.

Campaign Christmas Promotion Campaign

Menu | Edit | Save | Cancel | Calculate | [Icons]

Camp. Type Christmas Promotion
 Camp. Name Christmas Promotion Campaign
 Resp. Rep ID [Miranda Meyer](#) Camp. Status Scheduled
 Camp. Start 16.11.2013 Camp. End 23.12.2013
 Event Location Calculation Date

Work Orders | **Points** | Approval & Verification | Mailings | Activities | Costs

Act. Total Pts. Act. Wtd. Total Pts.
 Targ. Total Pts. Targ. Wtd. Total Pts.
 Total Pts. Perc. 0,00% Wtd. Total Pts. Perc.

2. Save the record.
3. Add the marketing activities that make up the campaign.

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.

Campaign Christmas Promotion Campaign

Export (HTML) | Export (PDF)

Christmas Promotion Campaign

- Marketing Activities
 - Variation
 - Target Group
 - Responses
 - Accepted
 - Rejected
 - Reps



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Search Results << < 1 - 2 of 2 > >>

Campaign	Marke...	Le...	Va	Ty...	Date
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Marketing Activities

Learn to plan and manage marketing activities.

Marketing activities are executed in the following steps:

1. Preparation.
2. Define the marketing activity and any additional information.
3. Edit the target group.
4. Generate and edit the data.
5. Monitor the results.

Related marketing activities can be grouped together to form campaigns.

Planning and Preparing Marketing Activities

Learn how to plan marketing activities and surveys.

Before executing a marketing activity, you need to enter its details and create any necessary documents and add 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.

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, see [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, see [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, see [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, see *Aurea CRM win User Guide*.

6. For e-mails:

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.

a. Create a file containing the e-mail's body text.

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.
- Create a file containing the text message's body text.

8. For surveys (via telephone or e-mail):

- Add a questionnaire.

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 placeholders 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&mes-  
sage=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:

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Defining Marketing Activities

Learn to define the format and execution of 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.
 - Reps.
 - Details on how the activity is executed.

Responses

You can enter the possible response to a marketing activity, which allows you to:

- Define follow-up activities, for example, to send an offer to those respondents who react positively to the first telephone contact.
- Review responses and count the number of responses of each type in order to determine the success of the marketing activity.

To define the follow-up response and assign points to a response:

1. Define two marketing activities. The second marketing activity should be dependent on a specific response being given to the first one.
2. 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.

Response W1

Menu | Edit | Save | Cancel | [Print Icon]

Response Yes
E-mail
Registration

Follow-up Marketing Activity | Numbers & Points

Follow-up Marketing Activity Send Greeting Cards

Level (Follow-up Marketing Act.) Variant (Follow-up Marke
Code (Follow-up Marketing Act.) Key (Follow-up Market

Parent Data

- Marketing Activity Send Invitations, Variation
- Marketing Activity Send Greeting Cards, Variation Brief

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.
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.

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.
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.

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.
- **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.

Your administrator can add a button or menu option that you can use to generate the mail merge in Microsoft Word, see [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. 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**

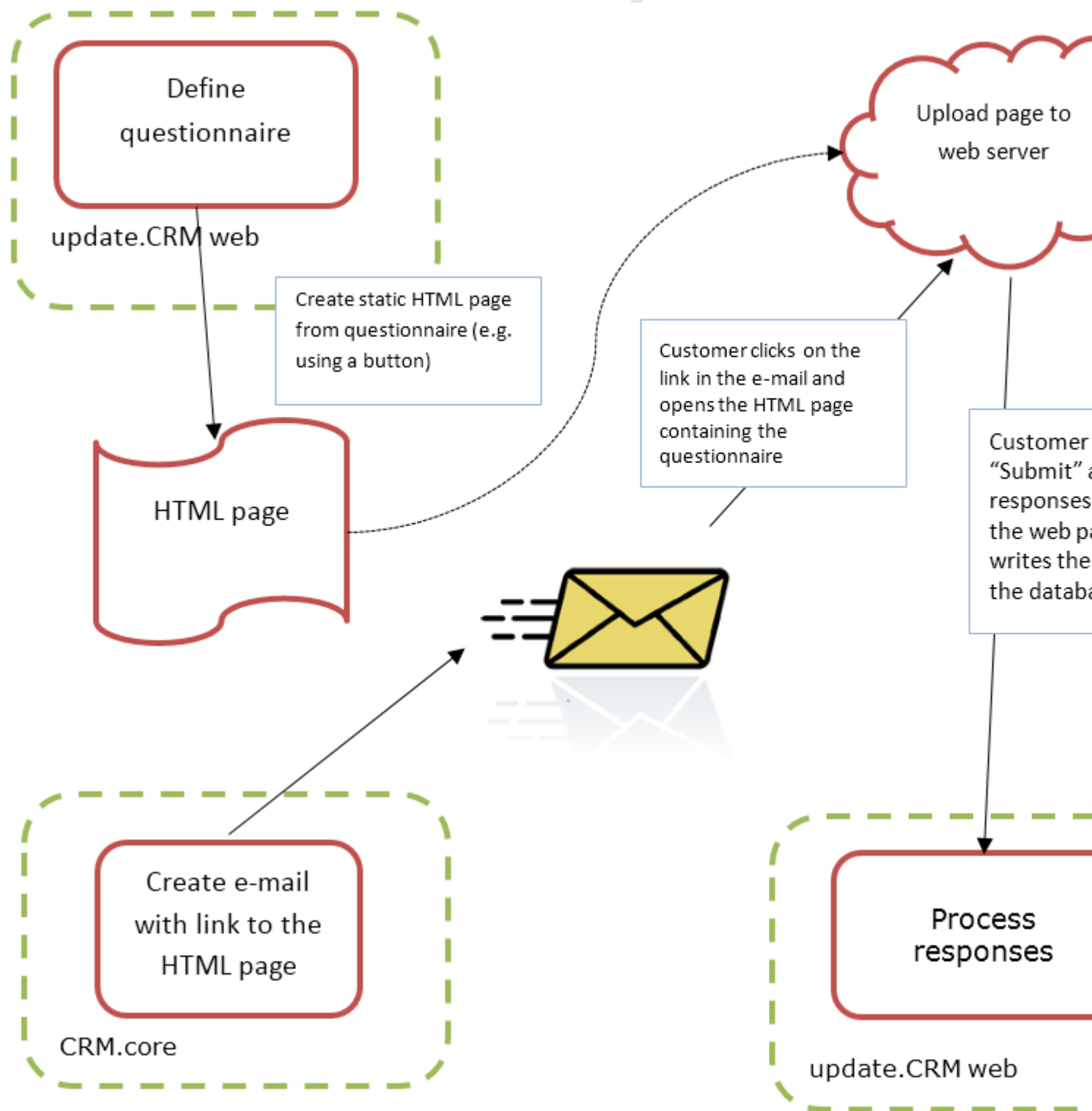
If none of the fields contains an e-mail address, no e-mail is sent to this company or person.

- **Ignore assigned labels:** Replaces the label formats defined for companies and/or persons by a uniform label format.
- **Language Transformation:** All catalog values are transferred to Microsoft Word in the language entered for the person.

- **Format:** The control file's format:
 - **Variable field length/Fixed field length:** Determines whether records are output with separators or using a fixed field length.
 - **Assign numbers:** Records are numbered sequentially.
 - **Separator:** Select the characters used as separators in the control file. Specify the separator between each **Record** and **Field**, and the **Field border** (at the start and end of a field).
5. Save the record. 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:

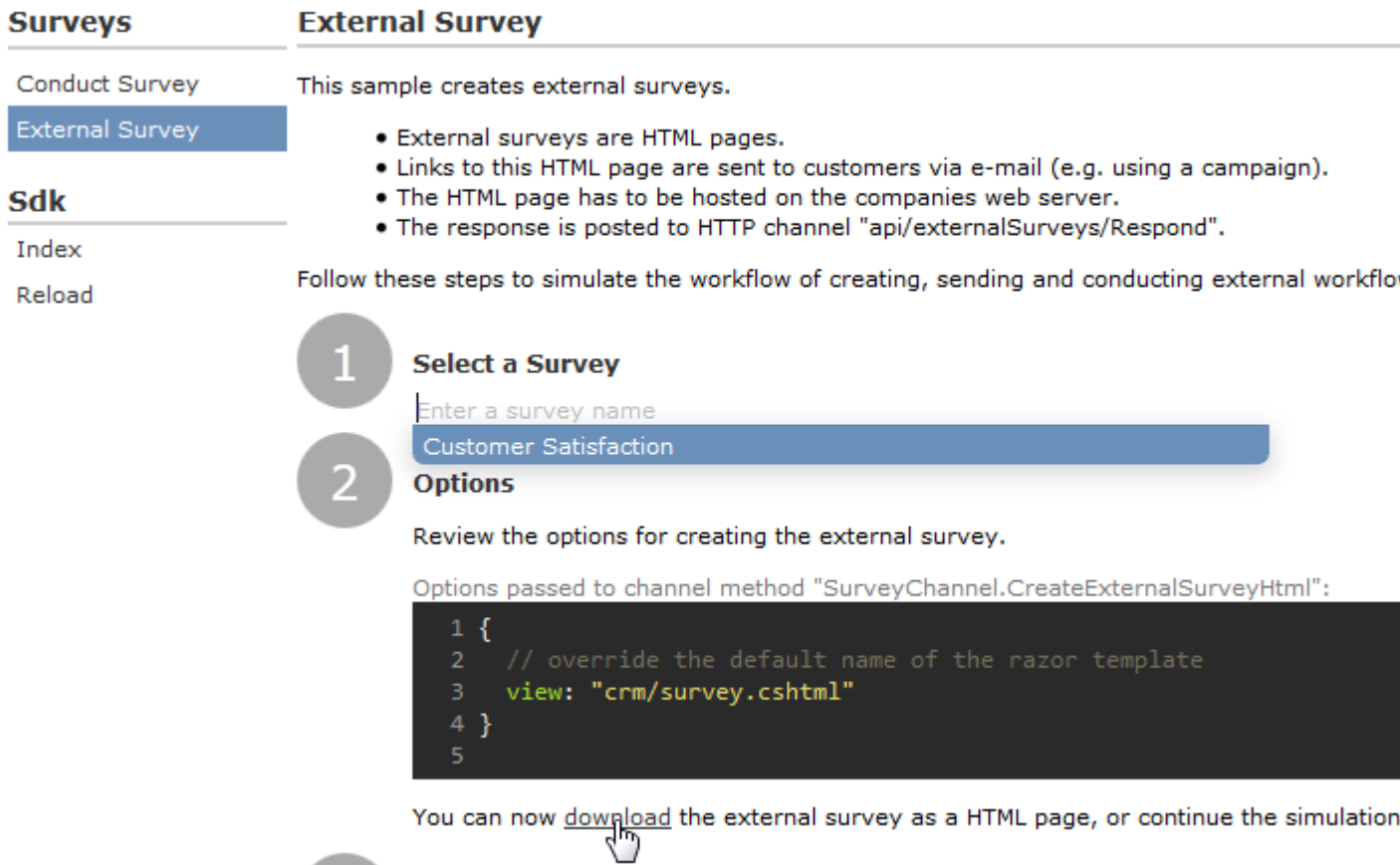
1. Define a questionnaire.

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:

- Select  (Administration) > SDK (this requires administrator privileges).
- Select **Surveys** > **External Survey**.
- Enter the first letter of the name of the questionnaire under step 1 (**Select a Survey**) and select the desired questionnaire from the list.
- Click on the **download** link in step 2 (**Options**).



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External Survey

This sample creates external surveys.

- External surveys are HTML pages.
- Links to this HTML page are sent to customers via e-mail (e.g. using a campaign).
- The HTML page has to be hosted on the companies web server.
- The response is posted to HTTP channel "api/externalSurveys/Respond".

Follow these steps to simulate the workflow of creating, sending and conducting external workflow

- 1 Select a Survey**
Enter a survey name
Customer Satisfaction
- 2 Options**
Review the options for creating the external survey.

Options passed to channel method "SurveyChannel.CreateExternalSurveyHtml":

```

1 {
2   // override the default name of the razor template
3   view: "crm/survey.cshtml"
4 }
5

```

You can now download the external survey as a HTML page, or continue the simulation

- 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>.
- Upload the HTML page to the web server so that it is accessible from the link in the e-mail sent to recipients.

3. Define a transfer fields format containing the fields in the **Person** and **Person in Company** info areas you want to use in the e-mail.
4. Create the e-mail using person data as in the example below:

```
<body>
```

```
<p style="font-family:verdana; font-size:10pt">
Dear <%KPFIRSTNAME%> <%KPLASTNAME%>,<br /><br />
```

```

We would like to invite you to take part in our customer satisfacti
<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,** >> on page 271.
 - **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>.

Marketing Activity Format **E-mail questionnaire**

Execution Type **One-off, execute selection/query**

Base **Private query** Target group definition

Start on **22.08.2014** Start at

Executing Rep ID **mmserver1** Start automatically

Target Group | Generate | Activities | Mailings | Work Orders | **Send** | Repeat | Automat. | Log

SMS: Text File (TXT) SMS: not personalized

Letter: Template Document Save letters

E-mail: Template Document ... **A1-183** E-mail: Send as

E-mail from **simon.eder@update.com** E-mail: not personalized

E-mail Priority **High**

Subject

Attach.1 Attach.2

Send questionnaire

Questionnaire (e-mail) **QuestionnaireForCatalogCustomers** Web server address

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.

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.

Response W1

Menu | Edit | Save | Cancel | [Icon]

Response **Yes**

E-mail

Registration

Follow-up Marketing Activity | **Numbers & Points**

Follow-up Marketing Activity Send Greeting Cards

Level (Follow-up Marketing Act.)

Code (Follow-up Marketing Act.)

Variant (Follow-up Marketing Act.)

Key (Follow-up Marketing Act.)

Parent Data

- Marketing Activity Send Invitations, Variation
- Marketing Activity Send Greeting Cards, Variation Brief

If this response is received, the respondent is automatically assigned 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, >> on page 279.
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.

Note: 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, >> on page 273.
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, >> on page 77.

Note: Selections are defined in Aurea CRM win.

5. Select a predefined query or selection in the **Target group definition** field.

Note: 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: 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: 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, >> on page 152.
 - **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: 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, >> on page 170. 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, >> on page 266. 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**

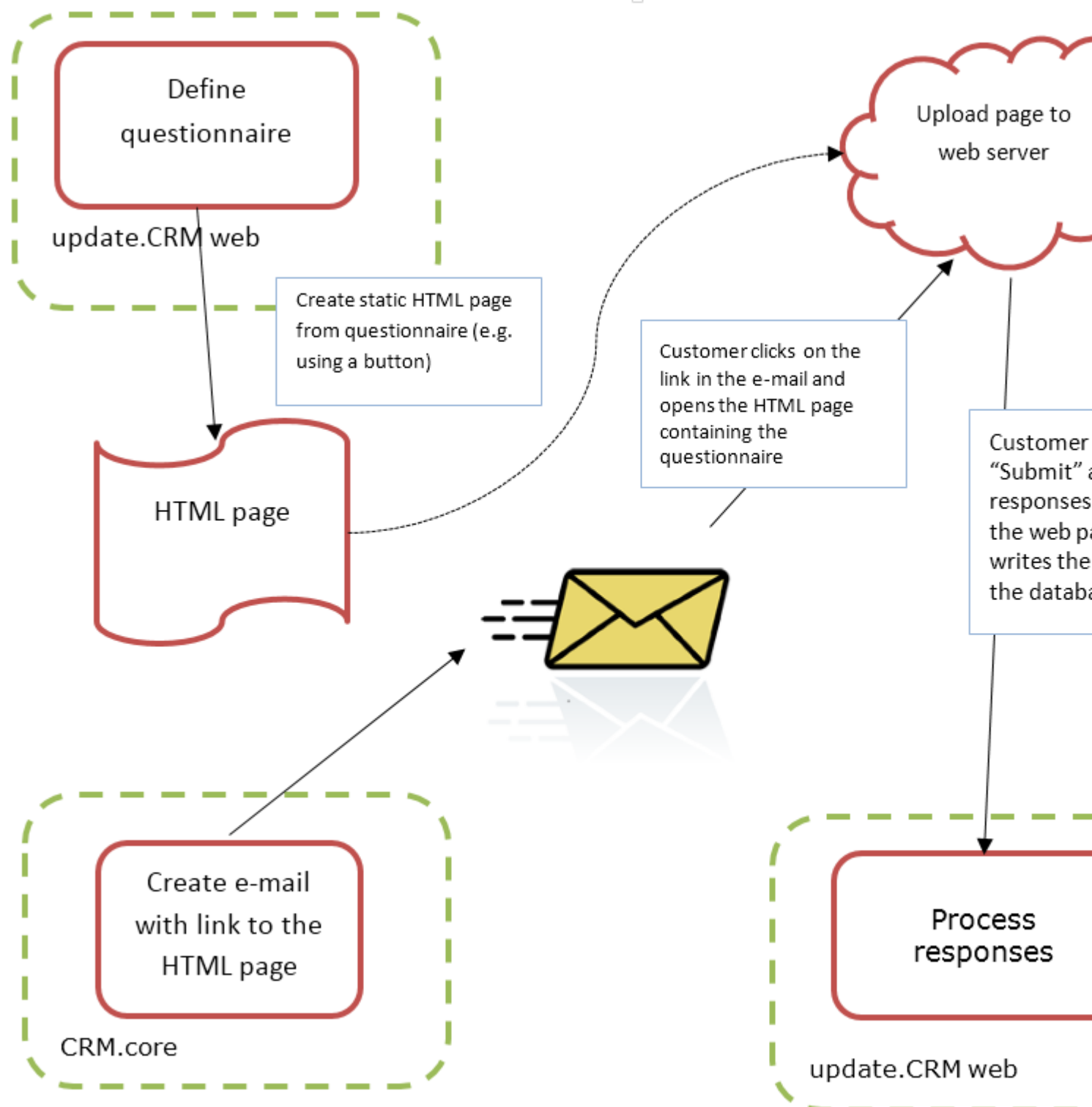
3. **E-mail 2**

If none of the fields contains an e-mail address, no e-mail is sent to this company or person.

- **Ignore assigned labels:** Replaces the label formats defined for companies and/or persons by a uniform label format.
 - **Language Transformation:** All catalog values are transferred to Microsoft Word in the language entered for the person.
 - **Format:** The control file's format:
 - **Variable field length/Fixed field length:** Determines whether records are output with separators or using a fixed field length.
 - **Assign numbers:** Records are numbered sequentially.
 - **Separator:** Select the characters used as separators in the control file. Specify the separator between each **Record** and **Field**, and the **Field border** (at the start and end of a field).
5. Save the record. 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, >> on page 161.

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:

- Select  (**Administration**) > **SDK** (this requires administrator privileges).
- Select **Surveys** > **External Survey**.
- Enter the first letter of the name of the questionnaire under step 1 (**Select a Survey**) and select the desired questionnaire from the list.
- Click on the **download** link in step 2 (**Options**).

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External Survey

This sample creates external surveys.

- External surveys are HTML pages.
- Links to this HTML page are sent to customers via e-mail (e.g. using a campaign).
- The HTML page has to be hosted on the companies web server.
- The response is posted to HTTP channel "api/externalSurveys/Respond".

Follow these steps to simulate the workflow of creating, sending and conducting external workflow

- 1 Select a Survey**
Enter a survey name
Customer Satisfaction
- 2 Options**
Review the options for creating the external survey.

Options passed to channel method "SurveyChannel.CreateExternalSurveyHtml":

```

1 {
2 // override the default name of the razor template
3 view: "crm/survey.cshtml"
4 }
5

```

You can now download the external survey as a HTML page, or continue the simulation

- 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:

```
<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 satisfacti
```

```
<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,** >> on page 271.
 - **Subject:** The e-mail's subject
 - **E-mail: Template Document:** E-mail template for unpersonalized e-mails
 - **Template Document (TXT):** E-mail template for personalized e-mails
 - **E-mail: Send as:** Select "HTML" to ensure that the link to the questionnaire is displayed correctly.
 - **E-mail from:** The e-mail address used as the sender of the e-mail
 - **E-mail: not personalized:** Enable this option to determine that no personal information should be included in the e-mail.
 - **Send questionnaire:** Enable this option.
 - **Questionnaire (e-mail):** Choose the questionnaire you prepared earlier.
 - **Web server address:** Enter the full URL of the HTML file, e.g. <http://my.company.com/Questionnaire/CustomerSatisfaction.html>.

Menu | Edit | Save | Cancel | Create target group | Start Marketing Activity

Marketing Activity Format **E-mail questionnaire**

Execution Type **One-off, execute selection/query**

Base **Private query** Target group definition

Start on **22.08.2014** Start at

Executing Rep ID **mmserver1** Start automatically

Target Group | Generate | Activities | Mailings | Work Orders | **Send** | Repeat | Automat. | Log

SMS: Text File (TXT) SMS: not personalized

Letter: Template Document Save letters

E-mail: Template Document ... **A1-183** E-mail: Send as

E-mail from **simon.eder@update.com** E-mail: not personalized

E-mail Priority **High**

Subject

Attach.1 Attach.2

Send questionnaire

Questionnaire (e-mail) **QuestionnaireForCatalogCustomers** Web server address

7. Switch to the marketing activity format (>> on page 273).
 - Select **E-mail** and **Activity** in the **Preferred Channel** section.
 - Enter the transfer fields format on the **E-mail** tab.
8. Execute the activity, >> on page 278.

Target Group

Learn how to create and edit target group for marketing activities.

To create a target group, 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.




Note: If you do not create the target group yourself, it is 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 does 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.

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: 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 does not add the record to the target group a second time.

Note: 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

Learn how to run the marketing activities and edit generated records.

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 is 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 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, see *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.
- Enter the **Time** and/or **Duration** in the activity record.
- Set the status of the activity to "Completed" and enter the appropriate result (e.g. "Successful").


Editing Generated Records

To edit the records generated for a marketing activity:

- Contact the recipients and store their response(s) in the **Response 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, >> on page 163.
- 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

Learn how to monitor the success and status of campaigns and marketing activities by performing statistical calculations.

You can do this by clicking on  (**Calculate**) in the campaign or marketing activity record.

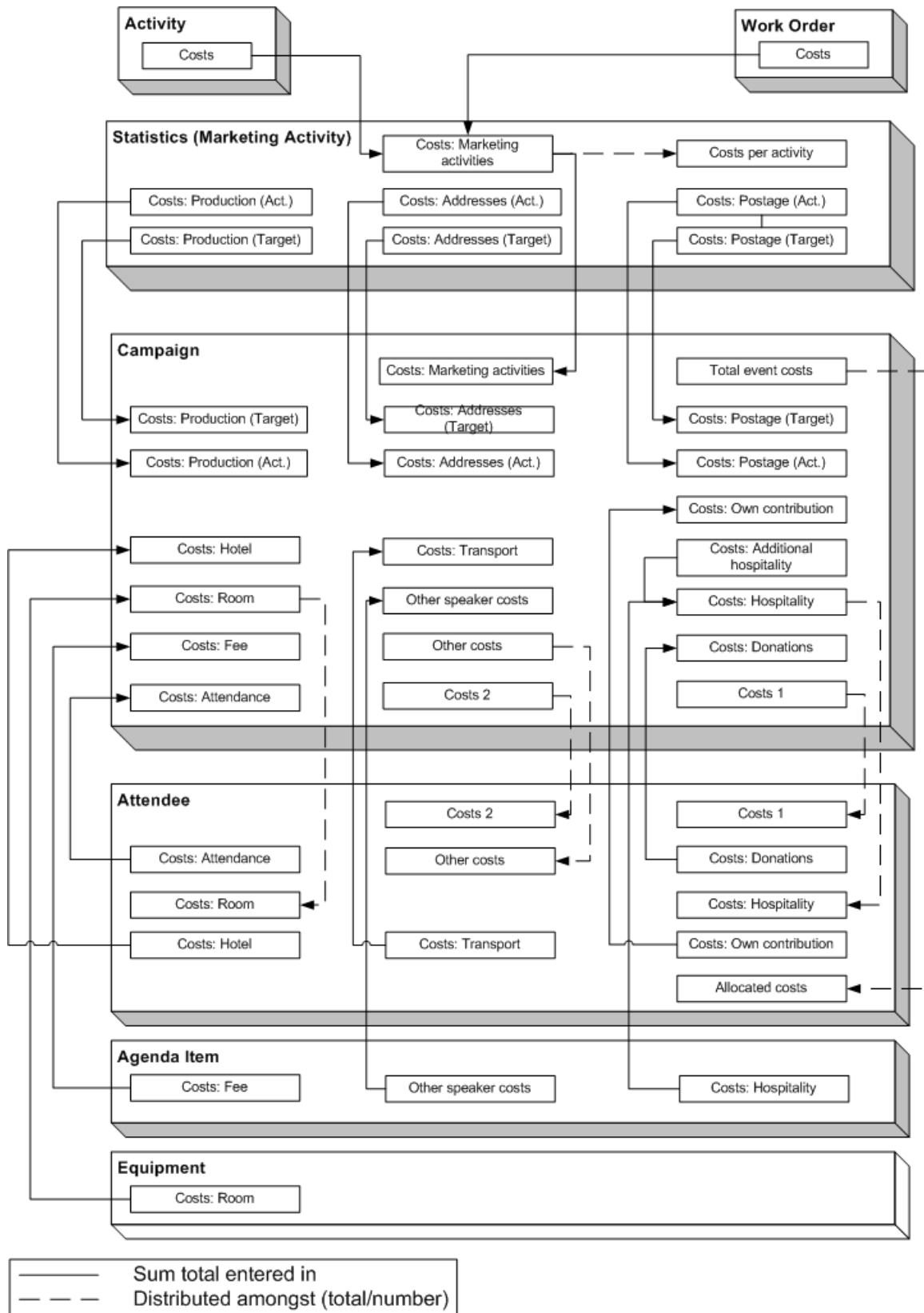
Based on the responses received, the success of a marketing activity is determined by comparing the actual results with the target results. The success of a campaign is calculated based on the success of the individual activities that make up the campaign.

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:

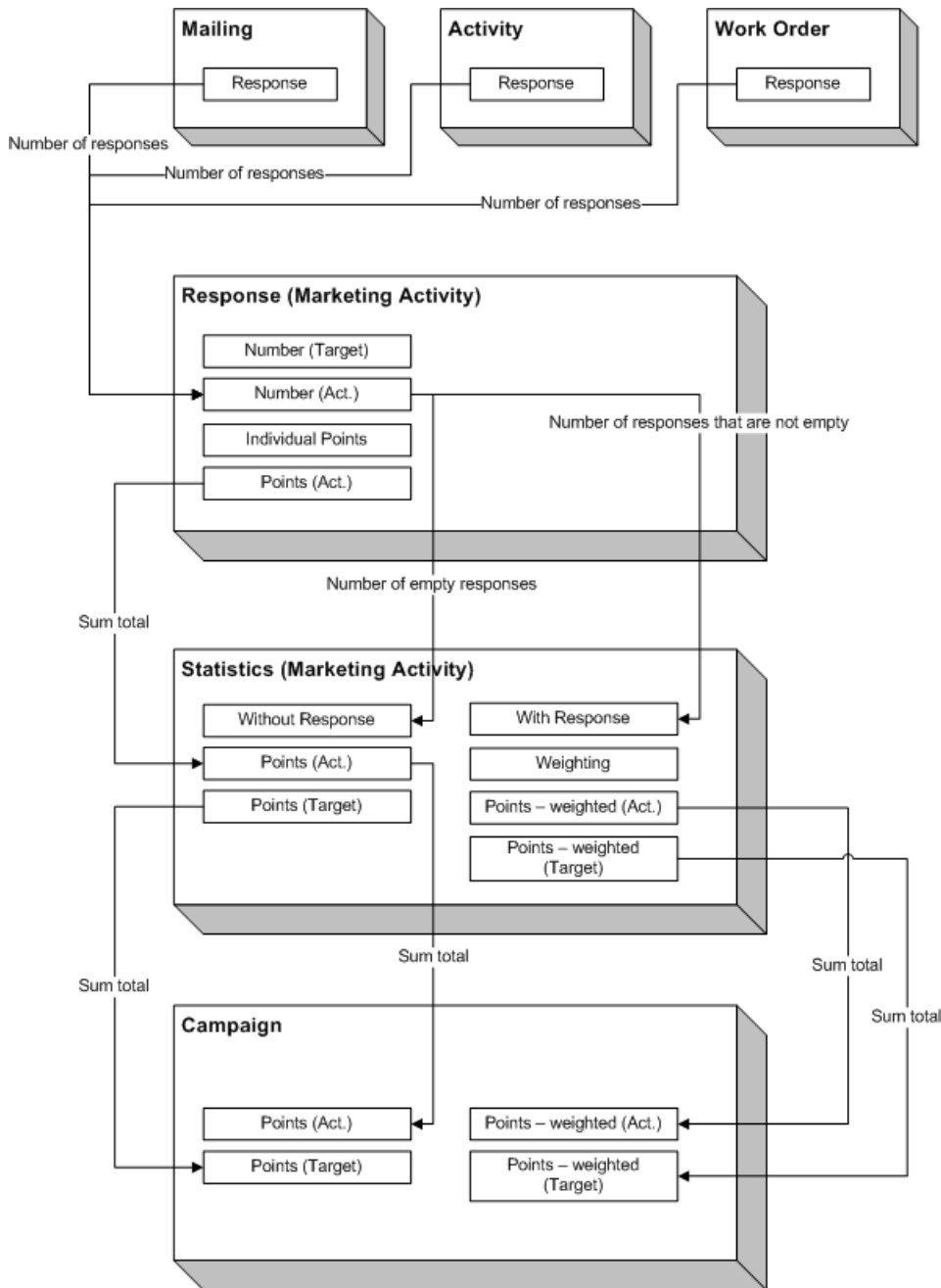
Costs



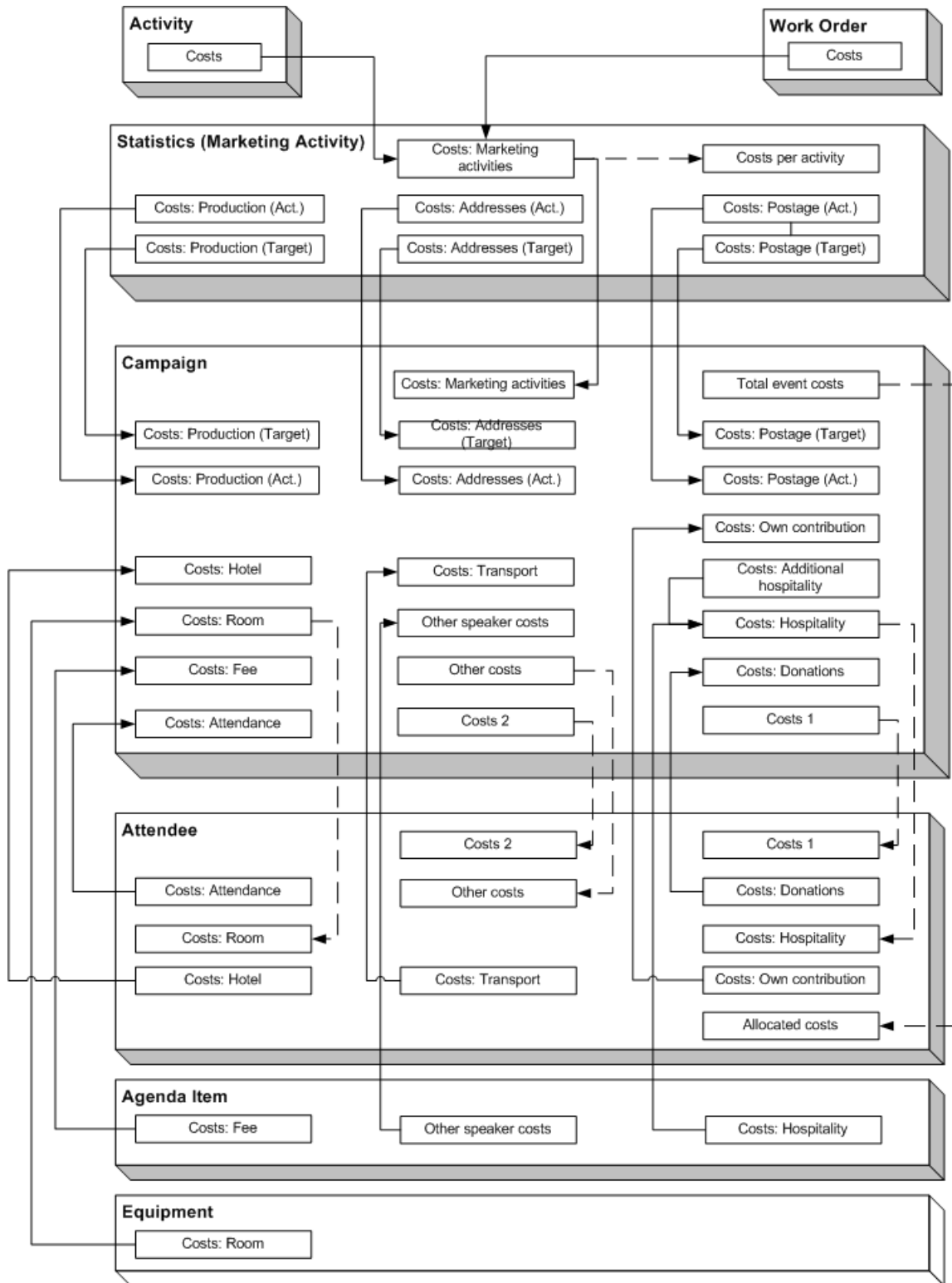
Campaign costs calculated based on data entered in the **Attendee**, **Agenda Item** and **Equipment** info areas are updated whenever you add a new record or edit an existing one. You can also click on **Calculate** in the **Campaign** info area to calculate the costs.

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



Costs

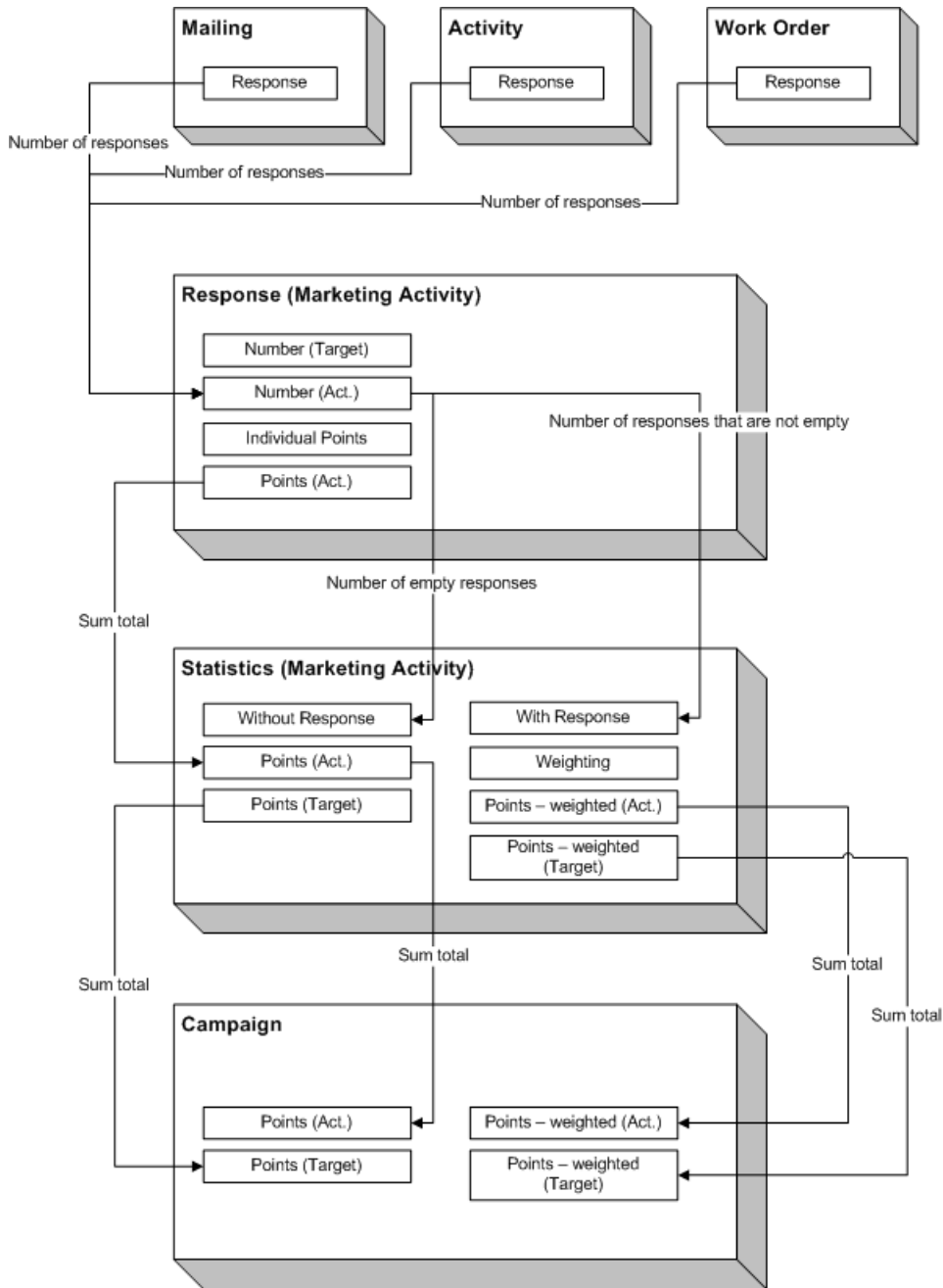


————— Sum total entered in
 - - - - - Distributed amongst (total/number)

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.

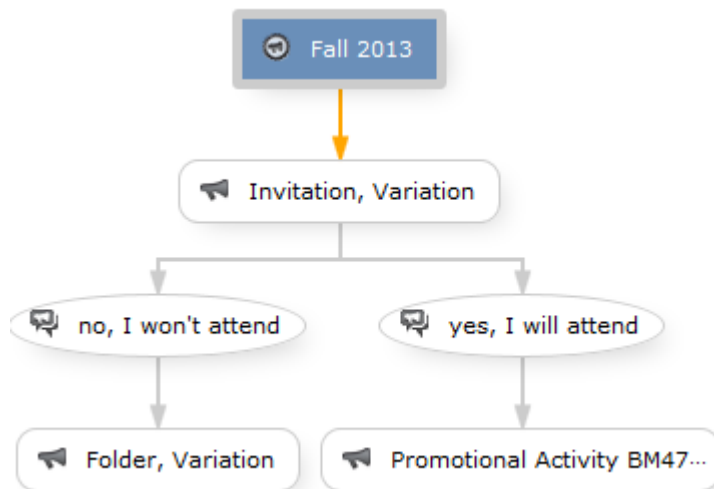
Costs related to the campaign that are distributed amongst attendees with the participation status "Participated" are not updated automatically. Click on **Calculate** to distribute these costs.

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.

26

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.

Current Query: Q1

2. Click **Empty Campaign**.

 Q1'."/>

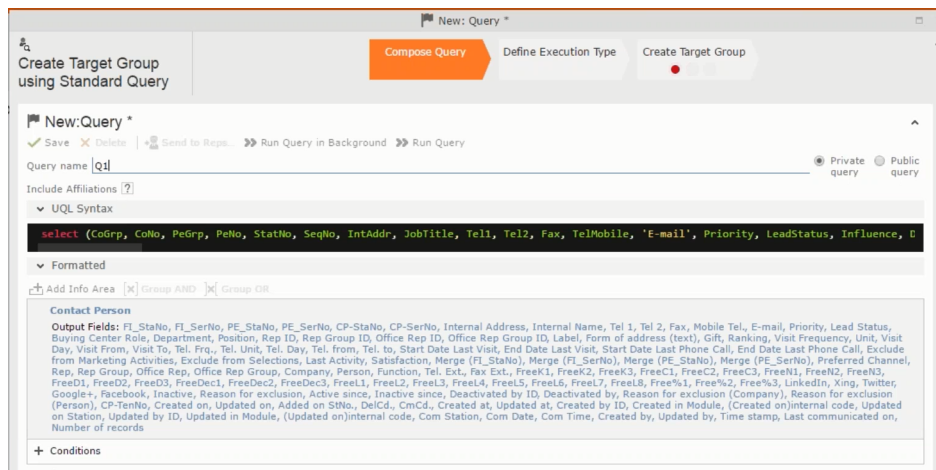
3. Enter the following details in the New Campaign window:

Note: All fields that are in orange are mandatory fields.

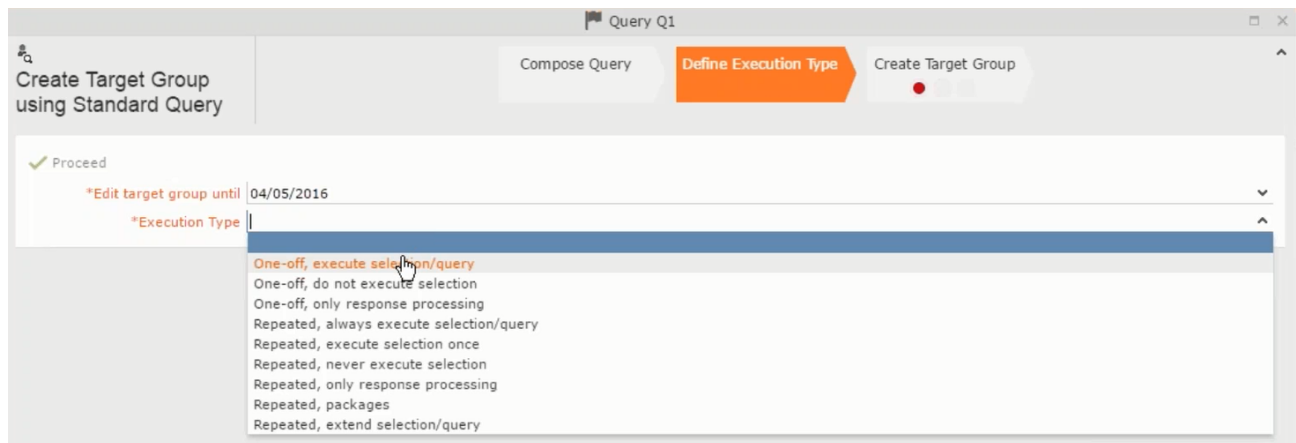
- **Name** – Enter a name for the campaign. (Mandatory field)
- **Starts On** – Enter the start date of the campaign. (Mandatory field)

- **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.

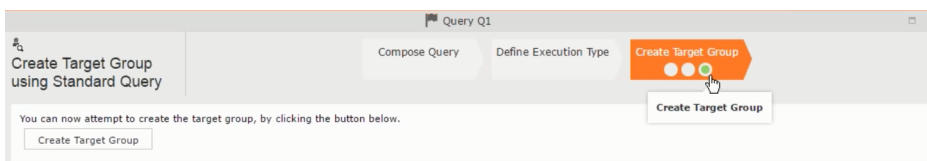
4. Click **Save**. The Campaign Designer opens.



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.

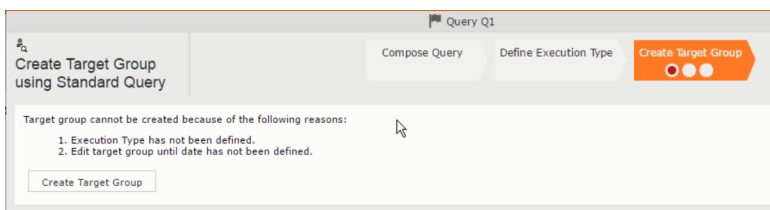


- To use an existing marketing activity:
 - From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens. ✓ Proceed
 - Search for the marketing activities from a campaign and select it from the search list.
 - Enter a New Start Date for the marketing activity, in the resulting window.

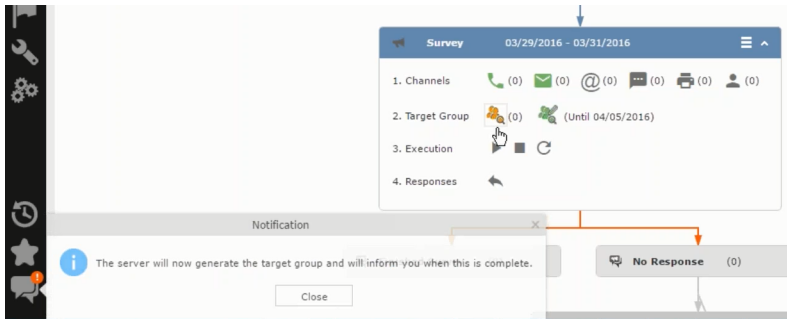


Note: If you do not provide a start date for the marketing activity then the start date on the reused marketing activity is used as start date.

- Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.



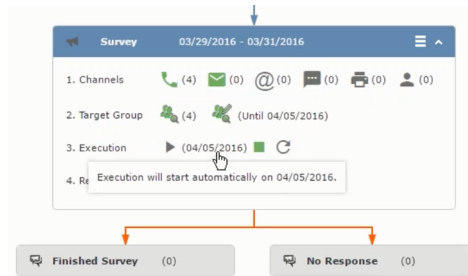
- Next you can make further additions to the marketing activity.
- To create a new marketing activity:
 - From the context menu select **New Marketing Activity**. The **New Marketing Activity** window opens.



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.

Edit Target Group

Campaign: Questionnaire
 Starts on: 03/25/2016
 Ends on: 04/06/2016
 Type: Questionnaire
 Status: Scheduled
 Resp. Rep ID: Edit target g... 04/05/2016

Company: _____ Last Name: _____
 Rep ID: _____ Inactive: [?]
 + Add more ... With me: []

Max. 15 records per page [Start Search]

Search Results Set Inactive Delete Add Person Add Person in Company Add Contact Person Add Company Modify List Fields

Company	Person	Rep ID	Response	Generated	Inact... Executed
Zummatechi	Orlando Rizzi			[x]	
Zummatechi	Carlene McNary			[x]	
Zummatechi	John Smith			[x]	
Lamplanet	Tonia Mertens			[x]	

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.

- Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.

Create Target Group using Quick Query

Compose Query Run Query Finalize Query Define Execution Type Create Target Group

Root Info Area Relationship Type Linked Info Area Where Field Logical Operator Condition Fields

Please select desired root infoarea

- Company
- Person
- Contact Person

Now you can further define the follow-up marketing activity to the responses defined above.

- 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.

Create Target Group using Quick Query

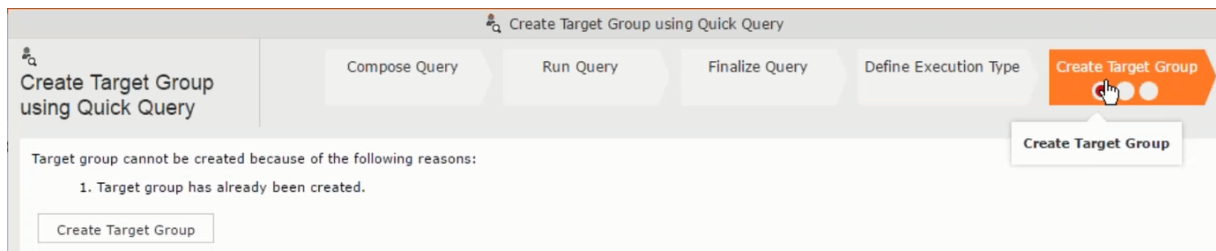
Compose Query Run Query Finalize Query Define Execution Type Create Target Group

You can now attempt to create the target group, by clicking the button below.

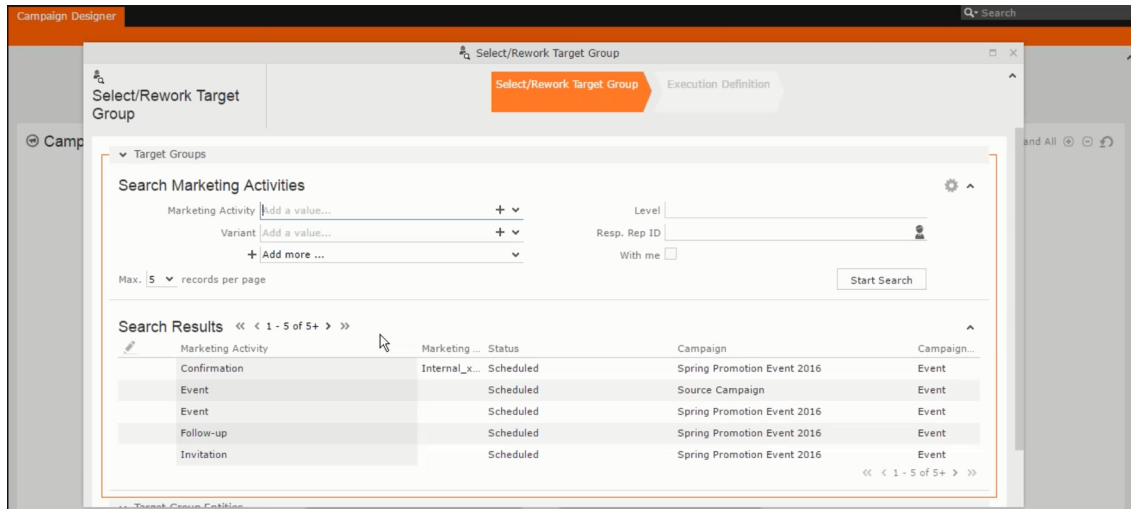
Create Target Group

This window gives you the option to create a new follow-up marketing activity or use an existing one.

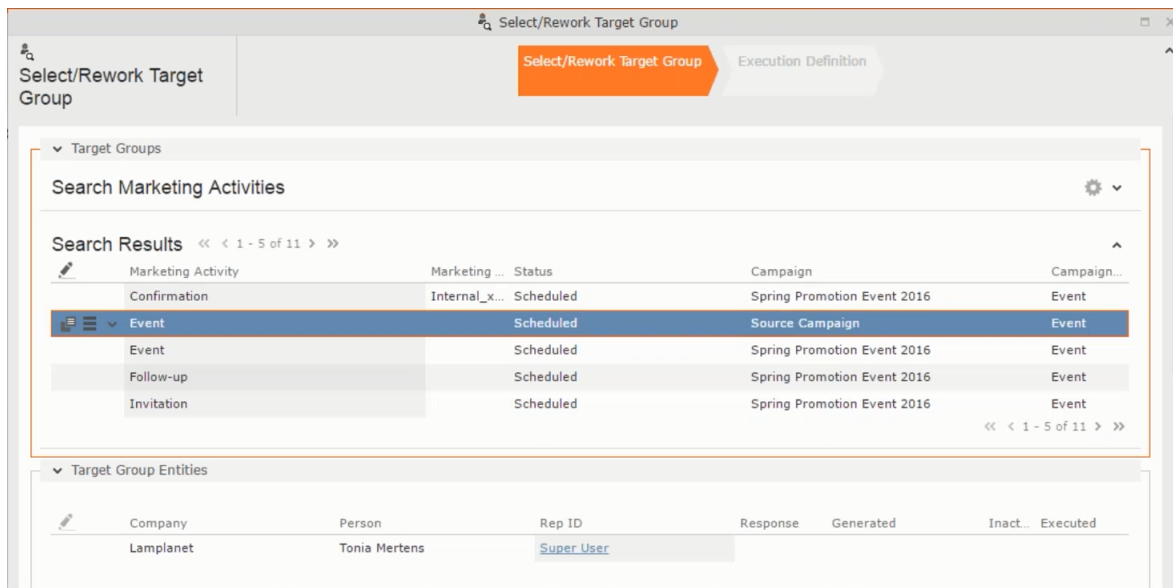
- To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (**Survey Reminder**) to the **No Response** marketing activity.



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.

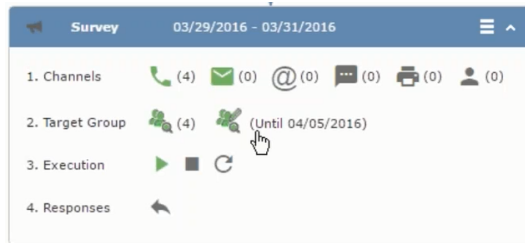


12. Select **Finished** and **No Response** options and click **OK**.



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.

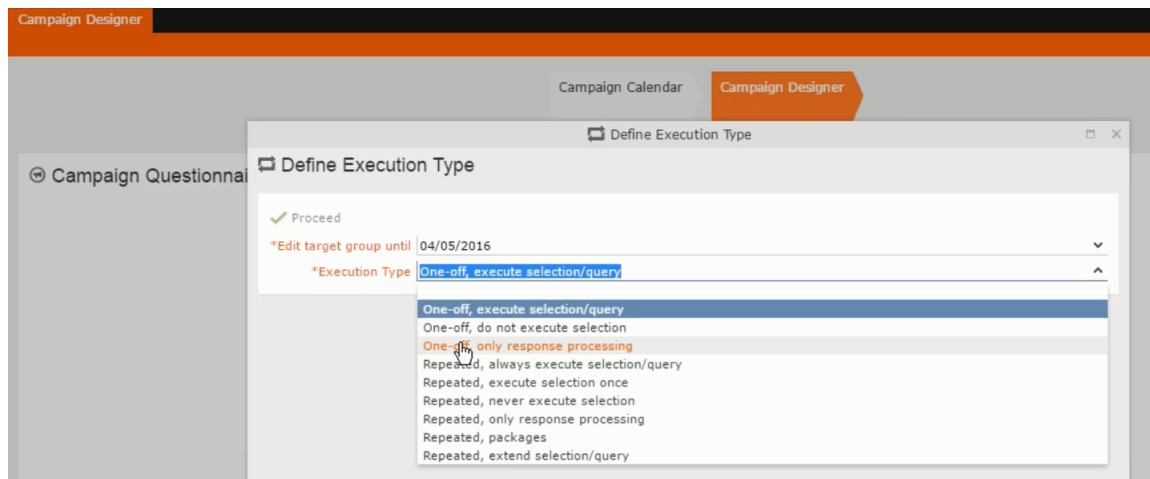


Note: Since we want to send a survey reminder from the same campaign named "Questionnaire" we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended 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.

Company	Person	Rep ID	Response	Generated	Inacti...	Executed
Zummatechi	Orlando Rizzi			<input checked="" type="checkbox"/>		
Zummatechi	Carlene McNary			<input checked="" type="checkbox"/>		
Zummatechi	John Smith			<input checked="" type="checkbox"/>		
Lamplanet	Tonia Mertens			<input checked="" type="checkbox"/>		

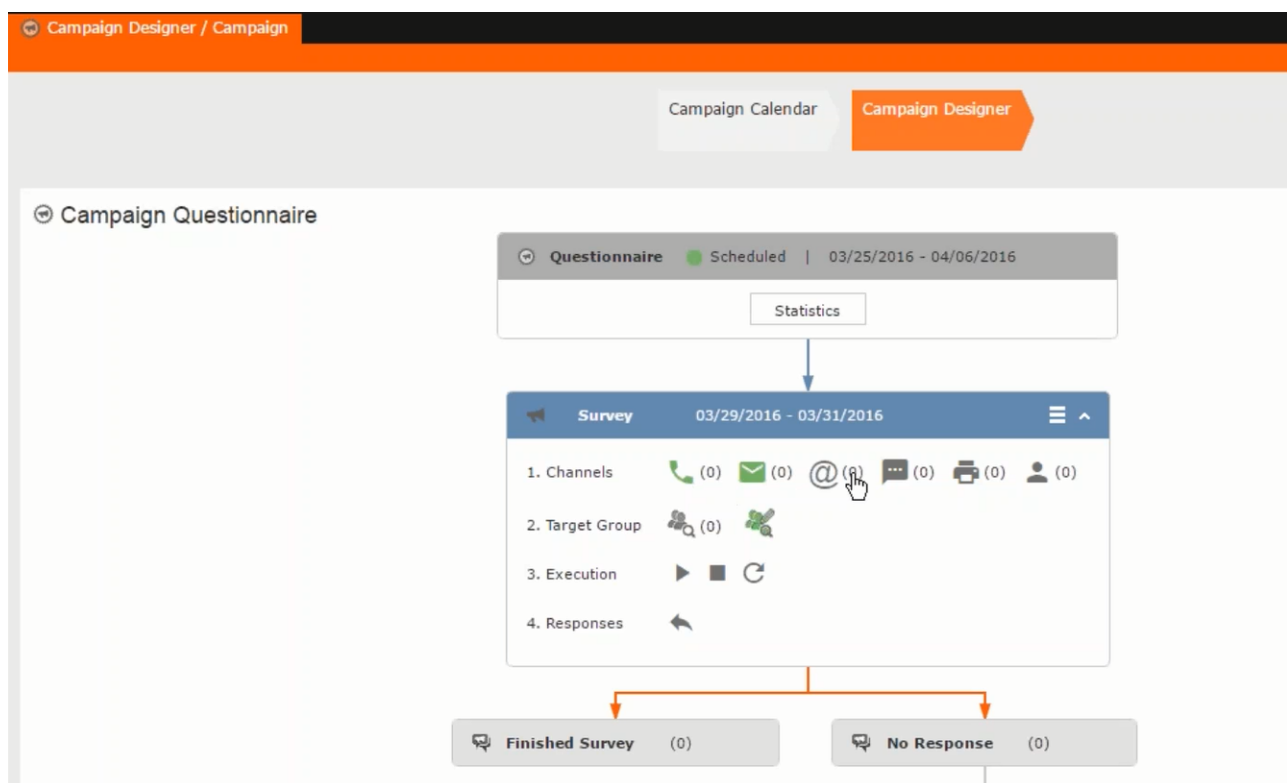
16. Next a confirmation follow-up marketing activity is added to the **Finished Survey** activity. To do this select **Define Follow-up Marketing Activity** from the **Finished Survey** context menu. To create a new marketing activity, perform the sub-steps described in step 5. In this case we add a new follow-up marketing activity (**Confirmation**) to the **Finished Survey** activity.



Viewing a campaign

To view an existing campaign, perform the following:

1. Select **Campaigns** from the **Marketing** menu of CRM web.

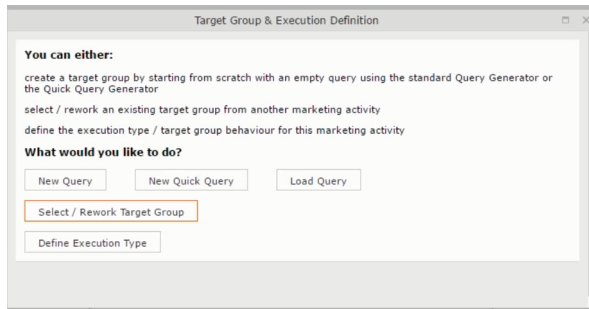


2. The **Search Campaigns** window opens. Enter the required criteria and click **Search**. The search results displays the list of campaigns.

(0)

Notice that the campaigns list shows the status and type of the campaign.

3. Select a campaign and double click it to open it in the campaign designer.



Deleting a Campaign from designer

To delete a campaign from a campaign designer:

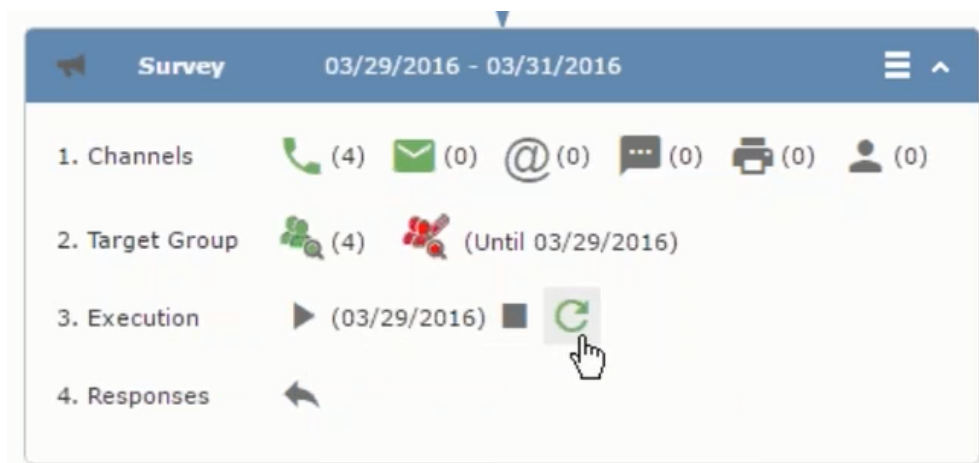
1. Open the campaign in a campaign designer.
2. Click the context menu from the campaign container.
3. Select the **Delete** option. The Question window pops up with the query “Do you really want to delete the selected record(s)?”
4. Click OK to confirm the deletion.

Note: Please note that this deletes the campaign along with all the activities in the campaign.

Viewing the Campaign Statistics

To view a campaign’s statistics:

1. On the Campaign container, click to expand the container. The Statistics button is visible.



2. Click the **Statistics** button or select **Statistics** from the campaign container context menu.



Note: The statistics shown in the Statistics window is calculated in the Edit Campaign window, as shown in the screenshot below.

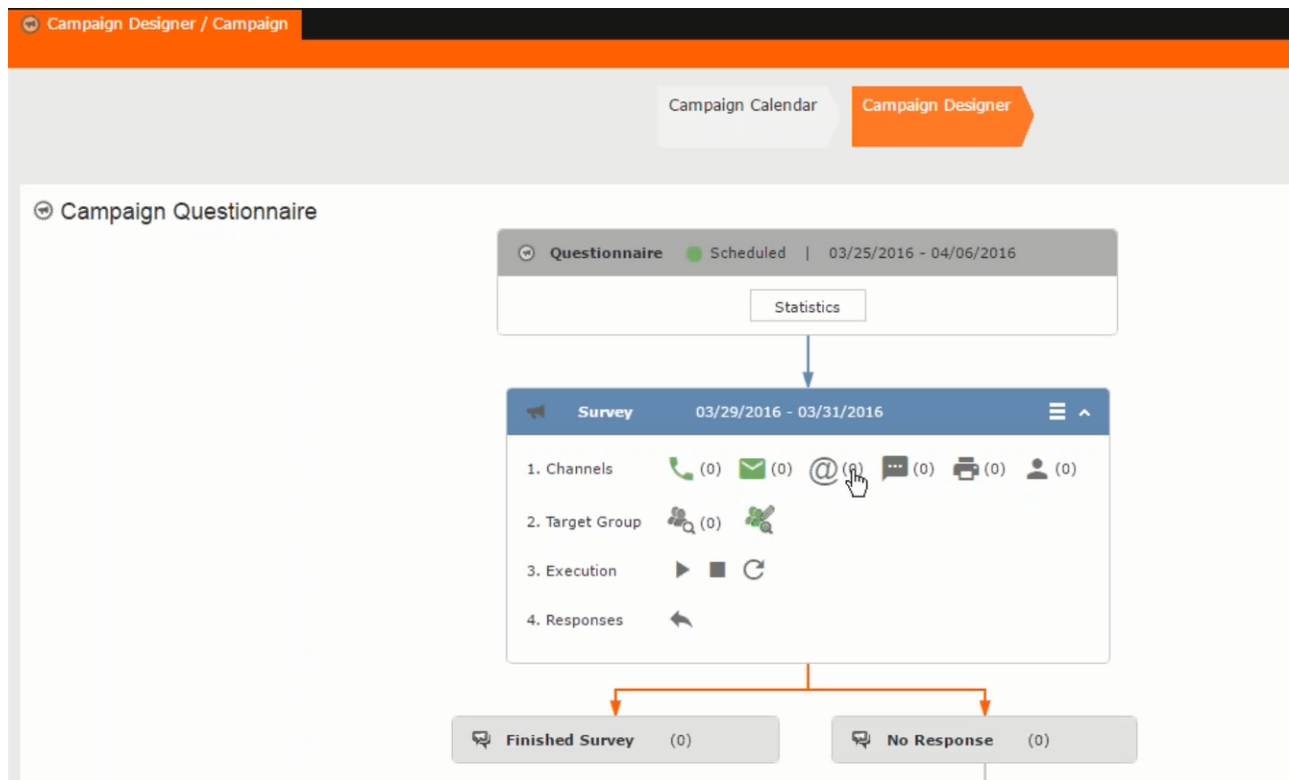


Viewing a campaign

Learn how to view an existing campaign.

To view an existing campaign, perform the following:

1. Select **Campaigns** from the **Marketing** menu of CRM web.

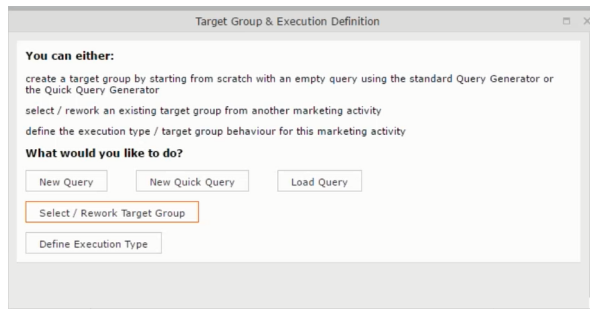


2. The **Search Campaigns** window opens. Enter the required criteria and click **Search**. The search results displays the list of campaigns.



Notice that the campaigns list shows the status and type of the campaign.

3. Select a campaign and double click it to open it in the campaign designer.



Creating a new campaign from scratch

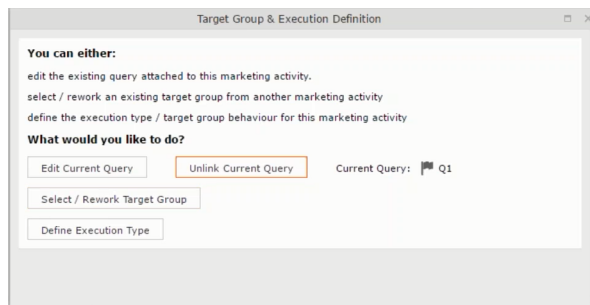
This topic guides you to create a new campaign from scratch.

To create a new campaign from scratch, perform the following steps:

1. Click the Marketing menu icon, and select **New Campaign** from the menu.

Current Query: Q1

2. Click **Empty Campaign**.



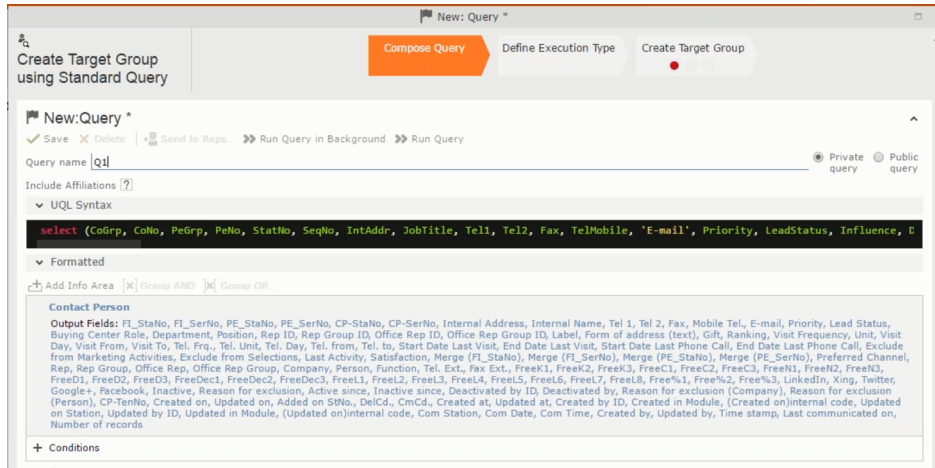
3. Enter the following details in the New Campaign window:

Note: All fields that are in orange are mandatory fields.

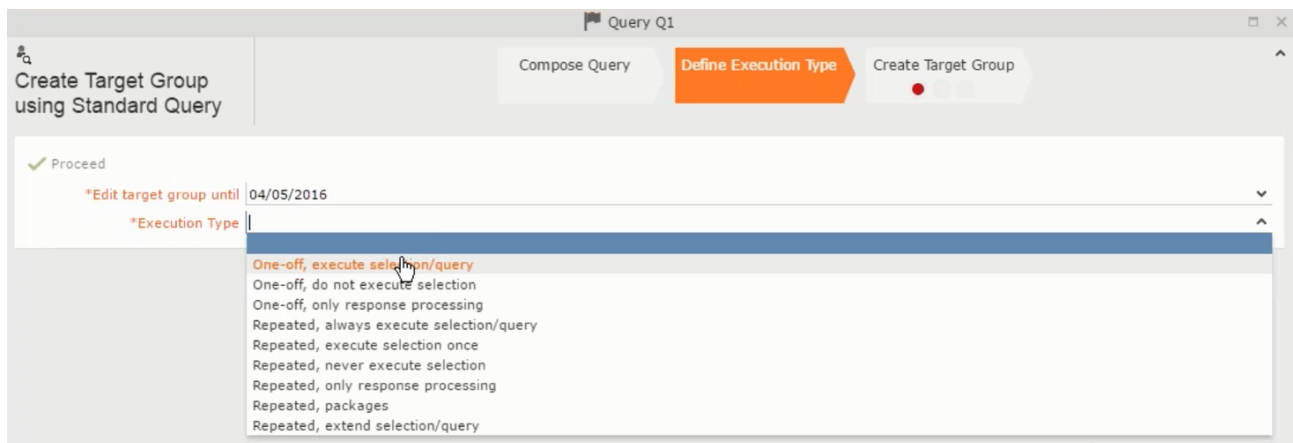
- **Name** – Enter a name for the campaign. (Mandatory field)
- **Starts On** – Enter the start date of the campaign. (Mandatory field)
- **Type** – Select the type of the campaign: Event; Questionnaire; or User Satisfaction. (Mandatory field)
- **Target Group Size (Target)** – Enter the number of recipients 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.

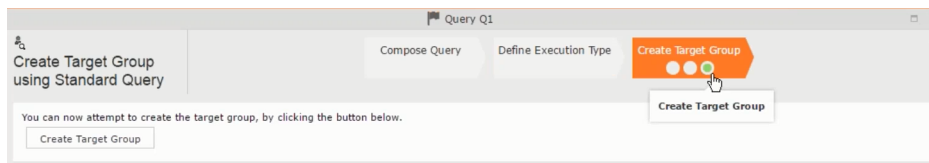
4. Click **Save**. The Campaign Designer opens.



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.

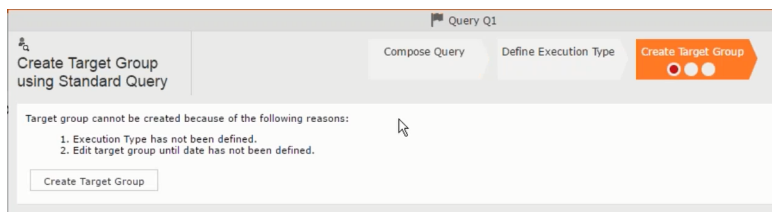


- To use an existing marketing activity:
 1. From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens. ✓ Proceed
 2. Search for the marketing activities from a campaign and select it from the search list.
 3. Enter a New Start Date for the marketing activity, 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.

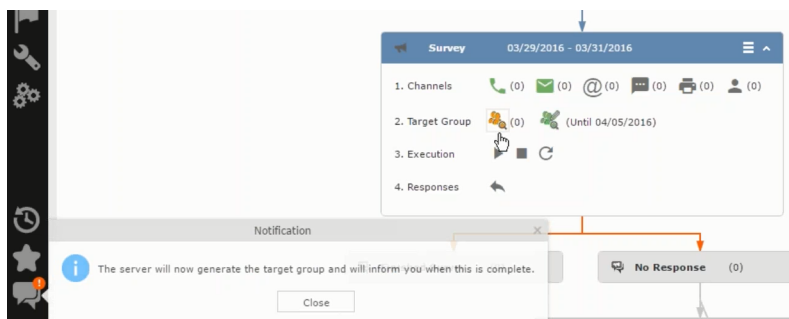
4. Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.



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.

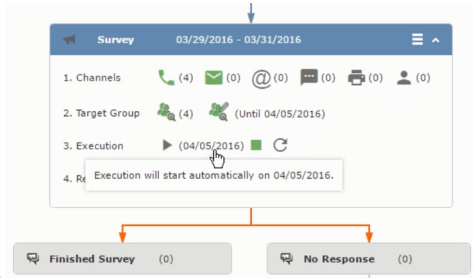


2. Enter the following details for the new marketing activity:

- **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.

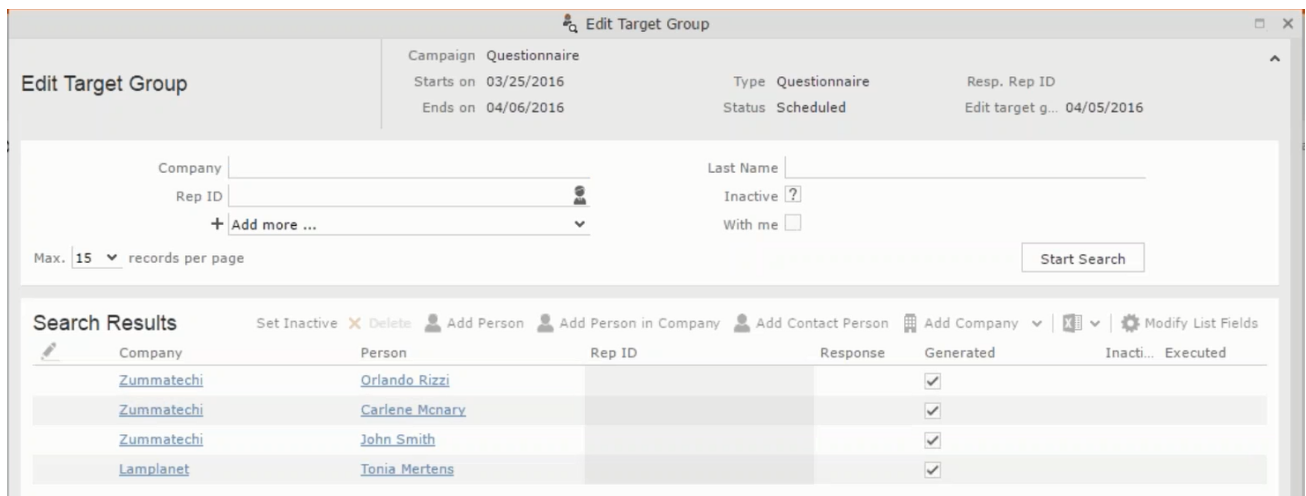
4. In the next step you need to define some responses for this marketing activity.

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.

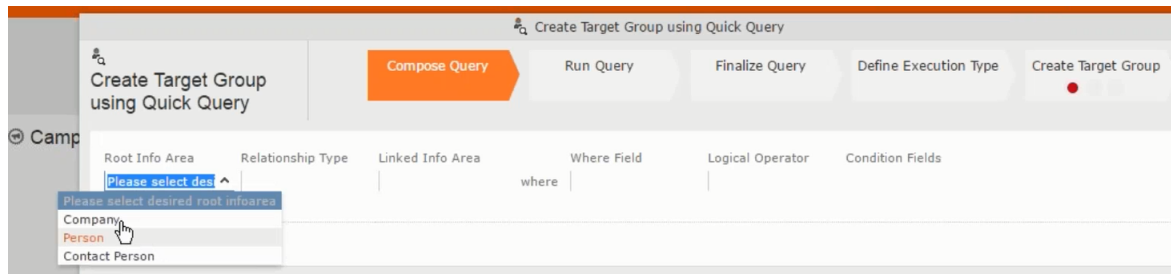


7. Select **Define Responses** from the context menu. A pop-up window is displayed.



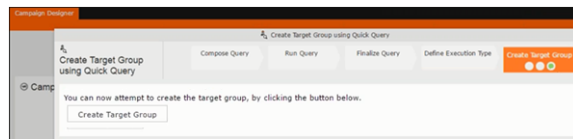
Note: The list of available responses are defined in the catalog entries for marketing activities. If no entries are present you get the catalog entries window and you have to define the response catalog entries in that window.

- Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.



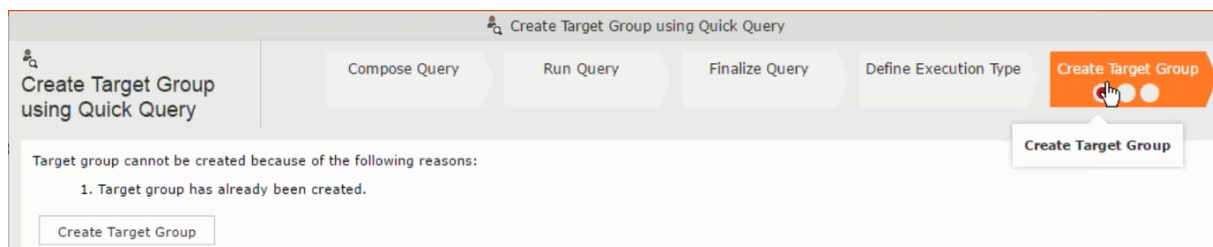
Now you can further define the follow-up marketing activity to the responses defined above.

- 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.

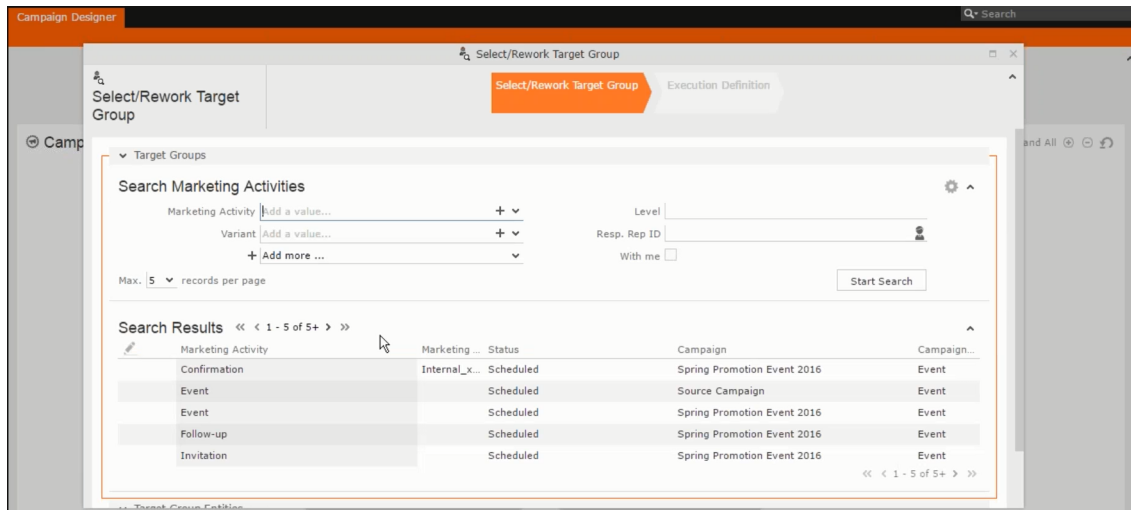


This window gives you the option to create a new follow-up marketing activity or use an existing one.

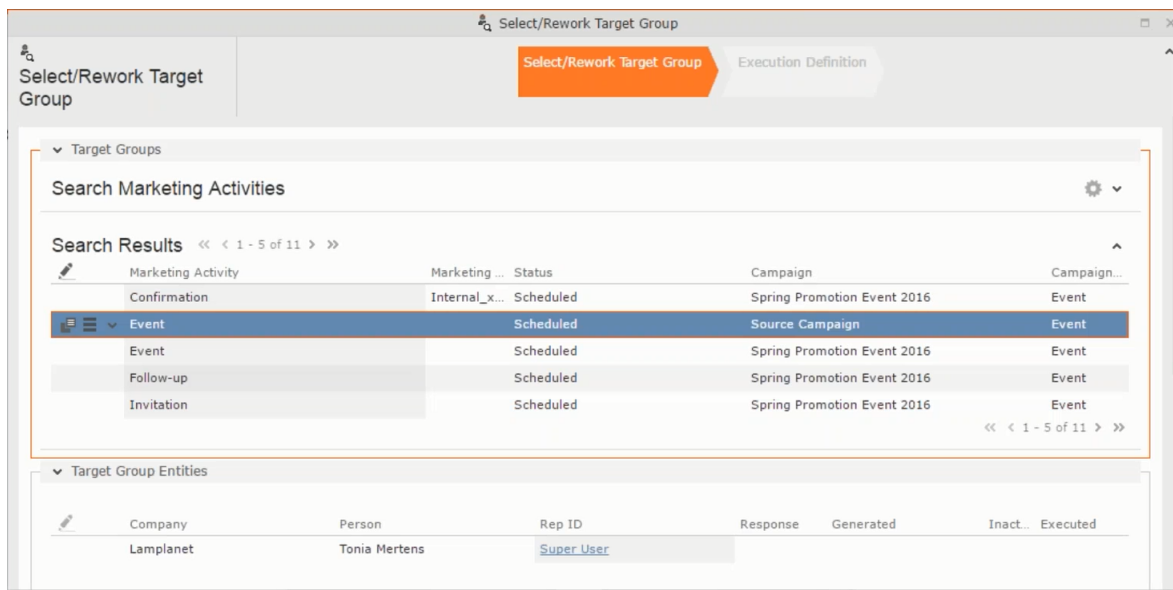
- To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (**Survey Reminder**) to the **No Response** marketing activity.



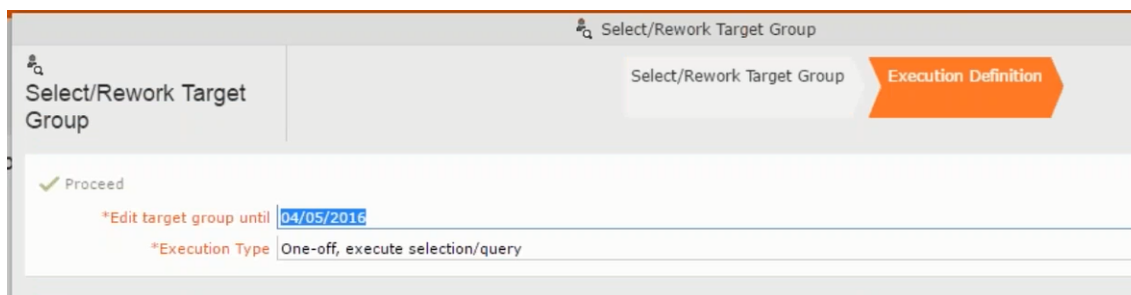
- Next we define the responses to the **Survey Reminder** follow-up marketing activity. Select **Define Responses** from the context menu. The **Responses (Survey Reminder)** window opens.



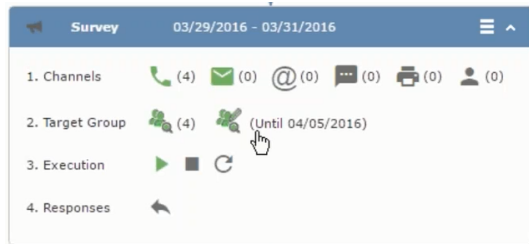
12. Select **Finished** and **No Response** options and click **OK**.



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.

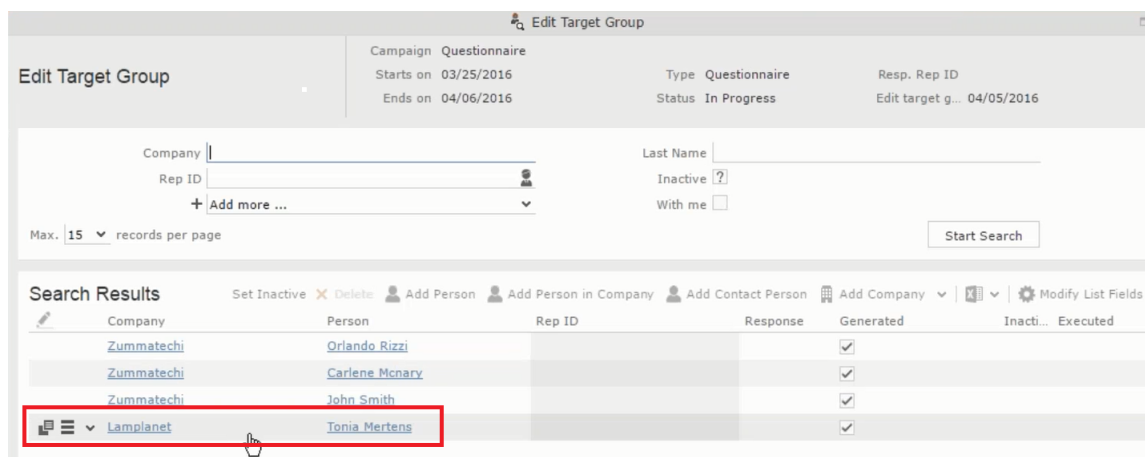


14. Click **Use Existing** button.

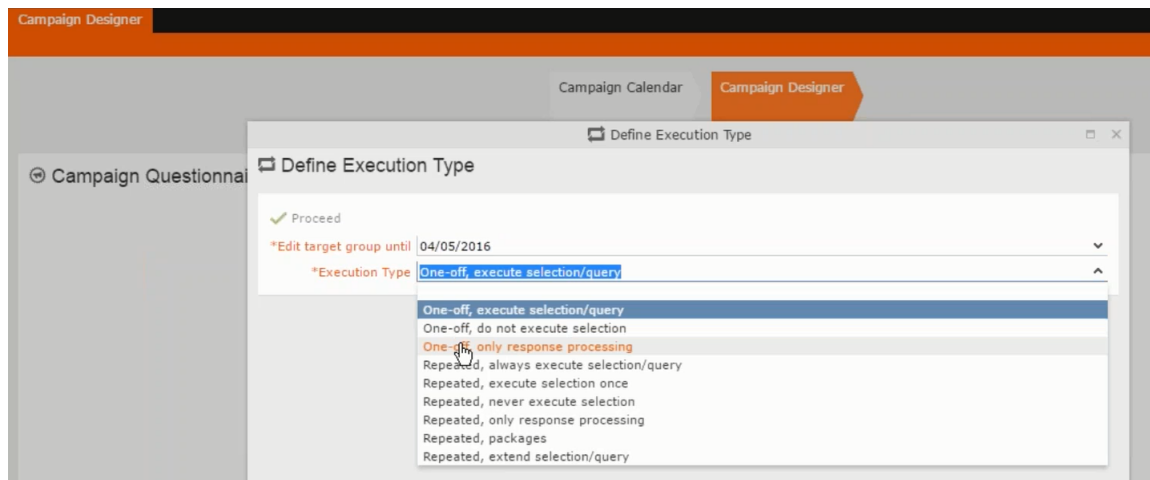


Note: Since we want to send a survey reminder from the same campaign named “Questionnaire” we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended 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.

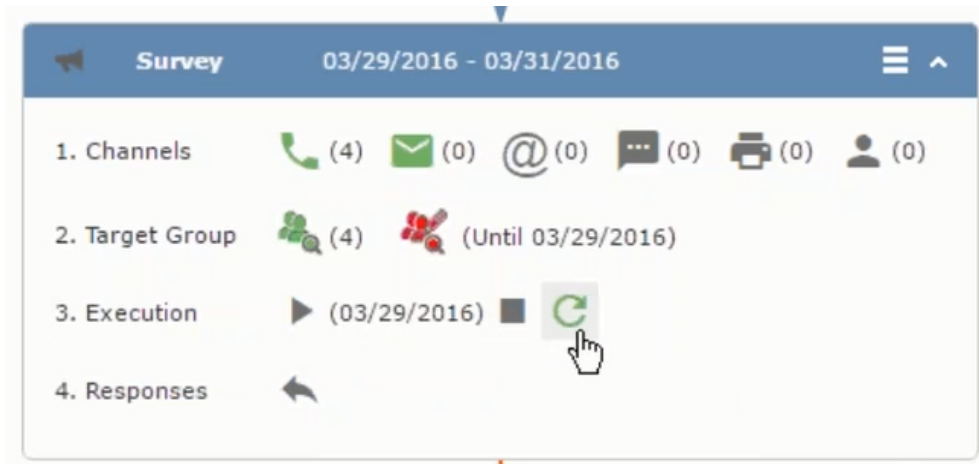
Note: Please note that this deletes the campaign along with all the activities in the campaign.

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 **Statistics** from the campaign container context menu.



Note: The statistics shown in the Statistics window is calculated in the Edit Campaign window, as shown in the screenshot below.



Working with Marketing Activities

Learn to work with marketing activities.

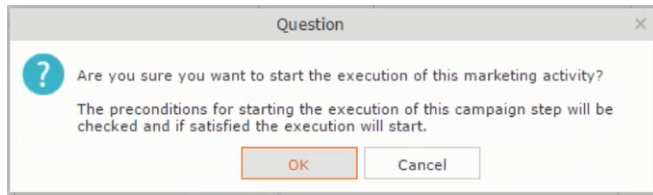
Creating a marketing activity involves the following steps:

1. Creating channels and formats used in a marketing activity.
2. Adding the target groups to the marketing activity, see [page 722](#).
3. Defining the execution definition, see [page 722](#).
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](#)

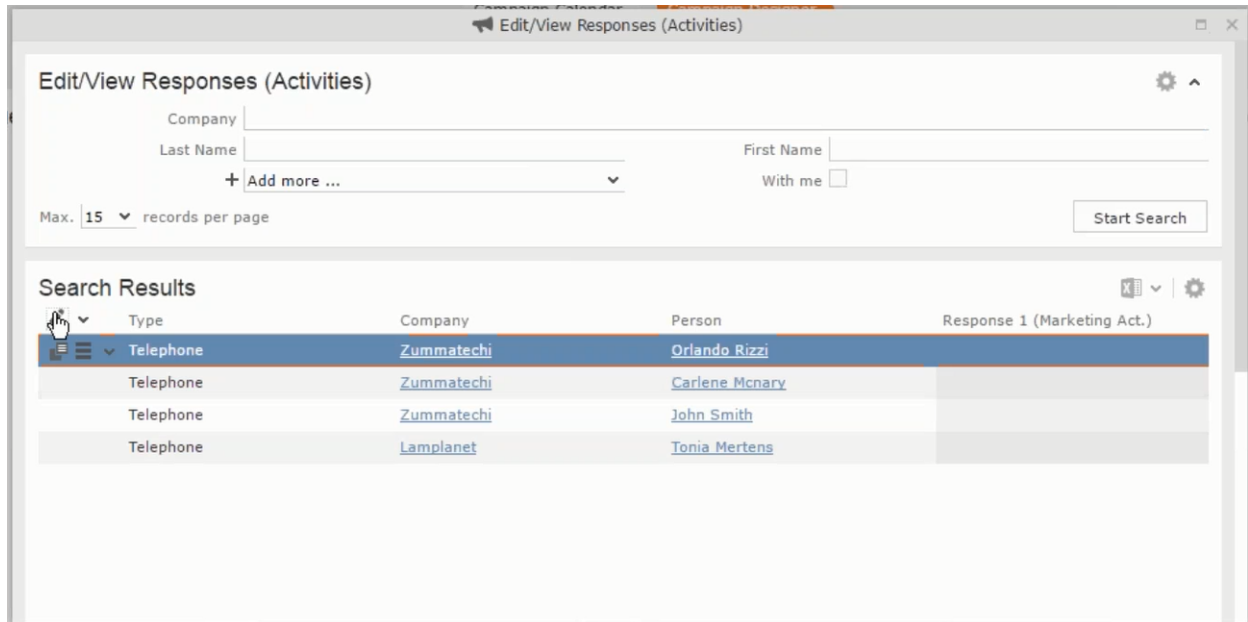
Defining Channels and Formats used in a Marketing Activity

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.



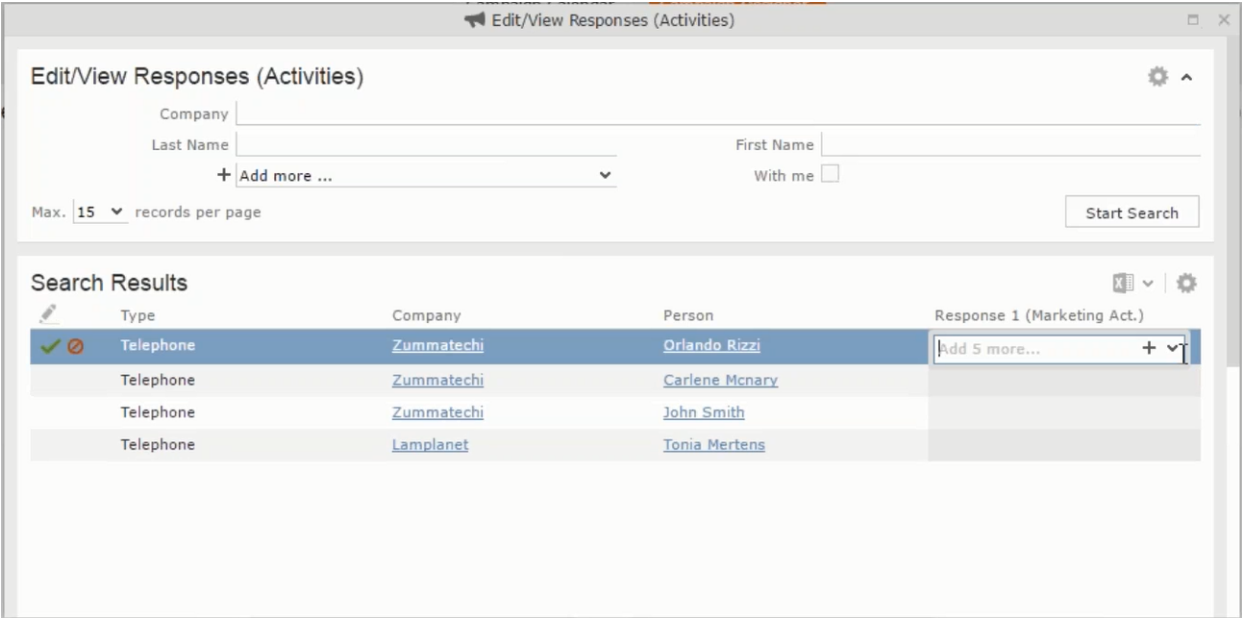
The following screenshot shows the **Survey** marketing activity container.



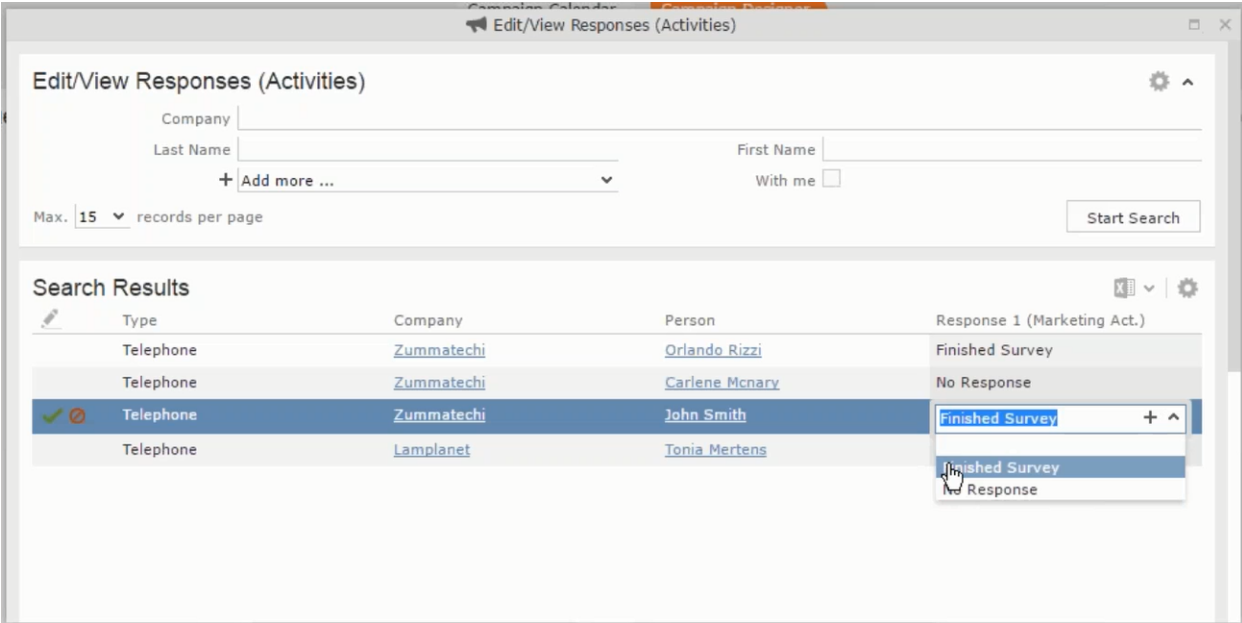
The following is a brief description of the components of a marketing activity:

Channels - The first row shows the available channels of communication for a marketing activity. The following channels are available:

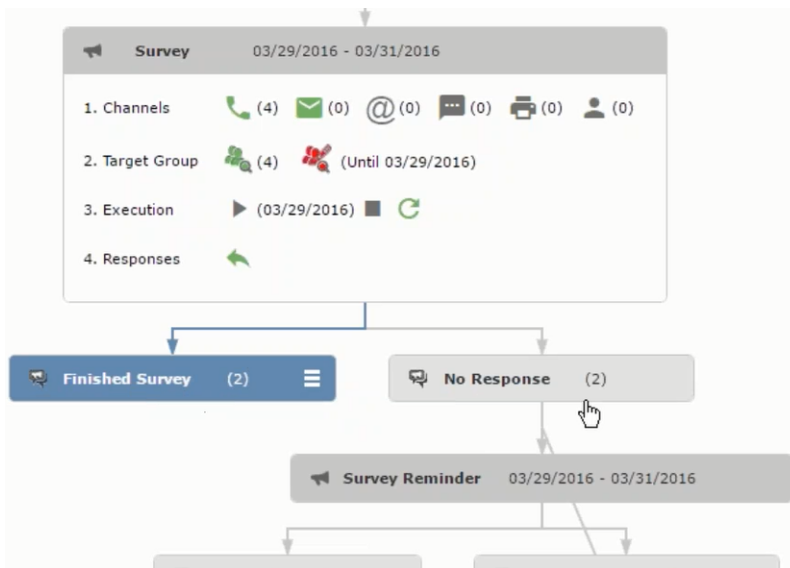
- Phone



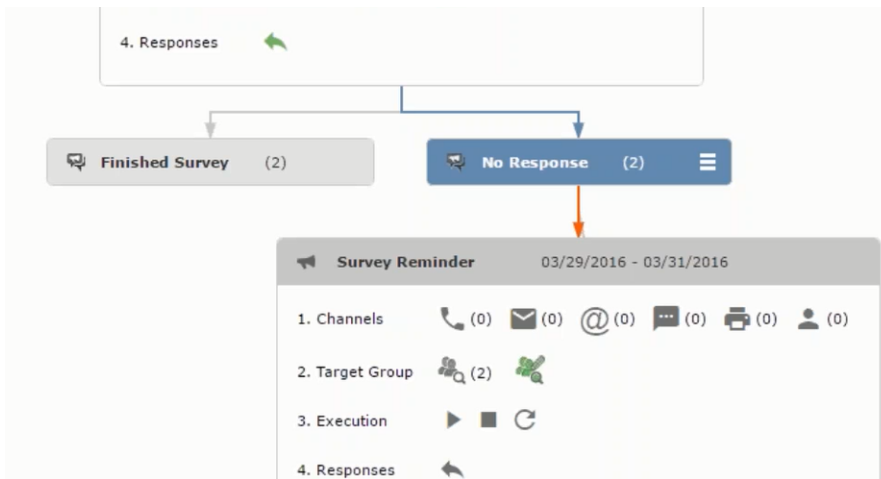
- Letter



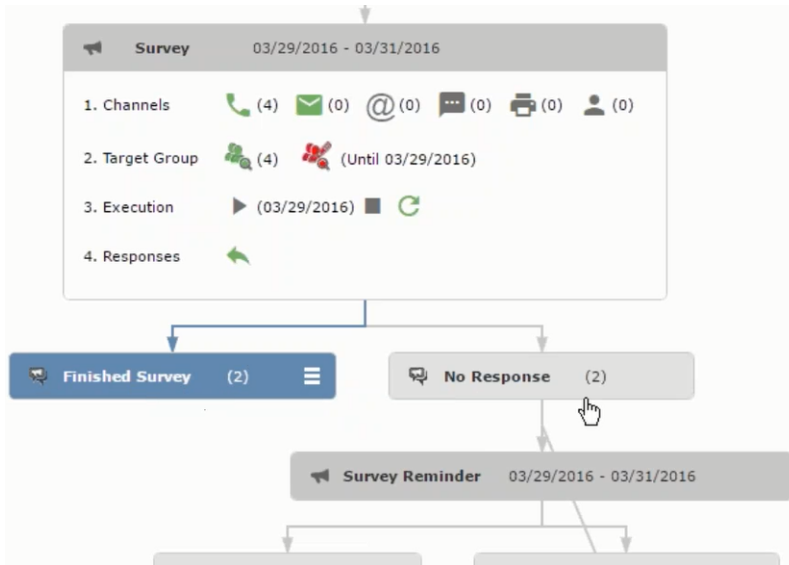
- Email



- SMS



- Fax



- In-person

The screenshot shows the 'Edit Target Group' interface for a 'Campaign Questionnaire'. It displays the start and end dates (03/25/2016 to 04/06/2016), the type (Questionnaire), and the status (In Progress). Below this, there are input fields for 'Company', 'Rep ID', 'Last Name', and 'Inactive'. A 'Start Search' button is present. The 'Search Results' section shows a table with columns: Company, Person, Rep ID, Response, Generated, Inactive, and Executed. The results are as follows:

Company	Person	Rep ID	Response	Generated	Inactive	Executed
Lamplanet	Tonia Mertens	Super User	No Response			
Zummatechi	Carlene McNary	Super User	No Response			

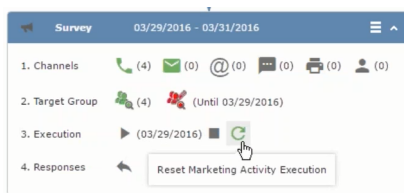
The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

Target Group – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

Execution – In this step, you can execute and start the marketing activity.

Responses – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.



The channel and format definition process contains three phases: **Define Channel(s) > Define Format > Define Default Values** . The window opens on the **Define Channel(s)** phase.

- **Define Channels** – In this phase you can select the channels that are used to approach the customers for the marketing activities.
- **Define Format** – In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.
- **Define Default values** – You can define the default values for the marketing activities that are generated.

4. Provide the following information in the **Define Channel(s)** phase:

Format Definition

- **Format Name** – You can give a name to the format definition or retain the automatically generated name. This field is mandatory.
- **Lock** – Select this check box to lock the message format for the marketing activity.
- **Private** - Select this check box to keep the message generated for the marketing activity private.

Preferred Channels

- **Fixed** – You can select one fixed channel.

Note: You cannot select variable channel, if you select a fixed channel.

- **Variable (Priority)** – You can select multiple channels with variable priorities for the channels.
- **Generate** – This selection generates activities for all entities to represent the successful generation during the marketing activity execution. This is selected by default and cannot be changed.

Save Channel(s) – Click this button to save the Channel format details you configured on this page.

Load Format – Click this button to open the Channel Formats search window. Select the required format previously created, from the search result and load it. You can then edit the format as required.

Proceed – Click this button to go to the next step, **Define Format**.

Note: If you have not saved the channel definition, you are prompted to save the channel configuration details before proceeding.

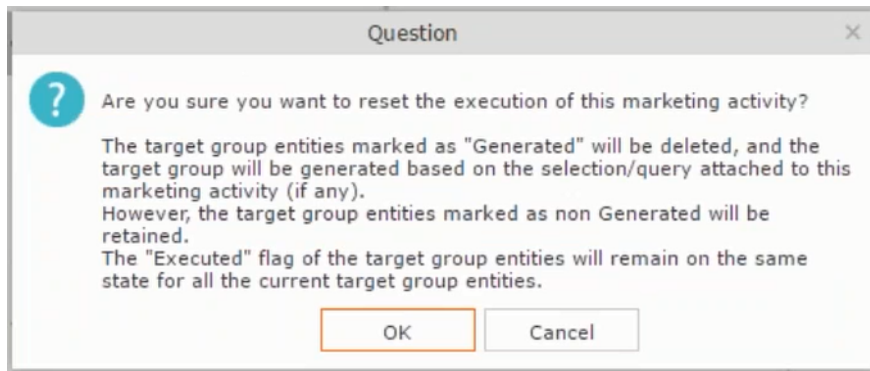
5. Click **Save Channel(s)**. Click **Proceed** to open the **Define Format** window.



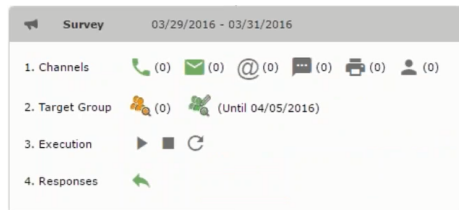
The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

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.

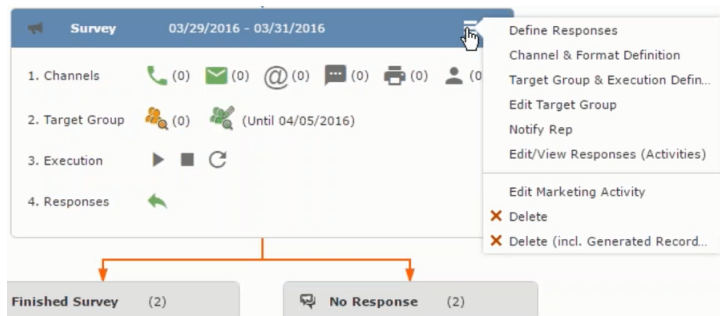
If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.



- 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.

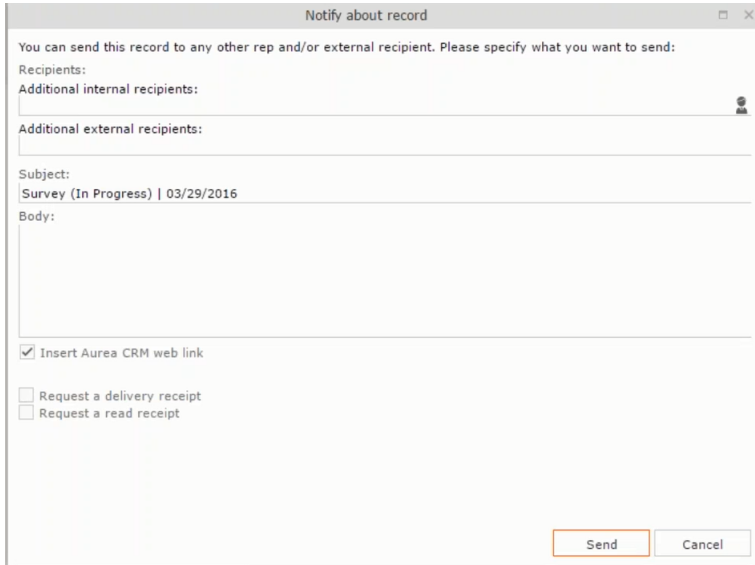


- After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.



You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

- After entering the default values, click **Save Default Values** and then click **Proceed** to return to the campaign designer window.

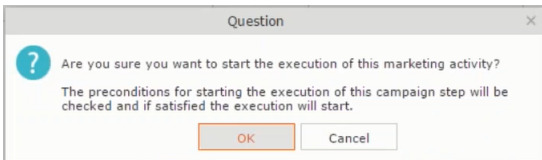


Notice that the Phone and Letter channels icons are now in green.

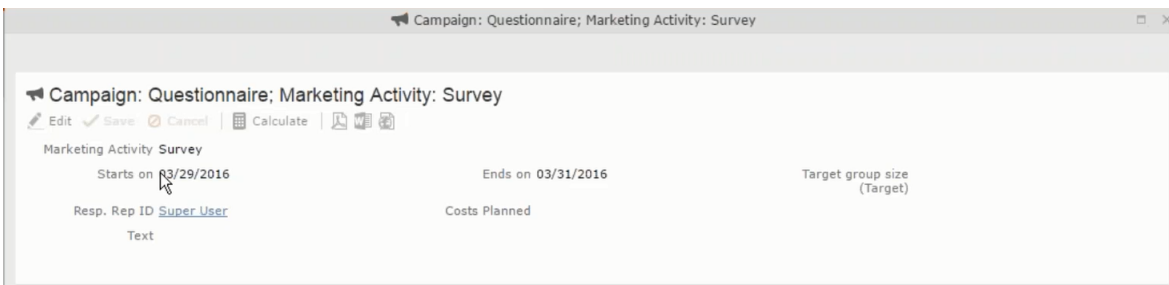
Adding the Target Group and Execution Definition

To define the channels and formats for a marketing activity, perform the following steps:

- Open the required campaign in the campaign designer.
- On the marketing activity container:
 - Click to expand the container.



- Click the target group icon to open the **Target Group**.



and **Execution Definition** window.

Campaign: Questionnaire; Marketing Activity: Survey

*Marketing Activity **Survey** + ▾
 *Starts on 03/29/2016 ▾ *Ends on 03/31/2016 ▾ Target group size (Target)
 Resp. Rep ID **Super User** Costs _____
 Currency _____ + ▾
 Text _____

You can create the target group and define execution type using the following buttons:

- New Query – Use this to create a target group using the Standard Query process.
- New Quick Query – Use this to create a target group using the Quick Query process.
- Load Query – Use this to search for and load a query that is already created and saved.
- Select/Rework Target Group – Use this to select a different target group or modify the target group.
- Define Execution Type – This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:

New: Equipment

Save

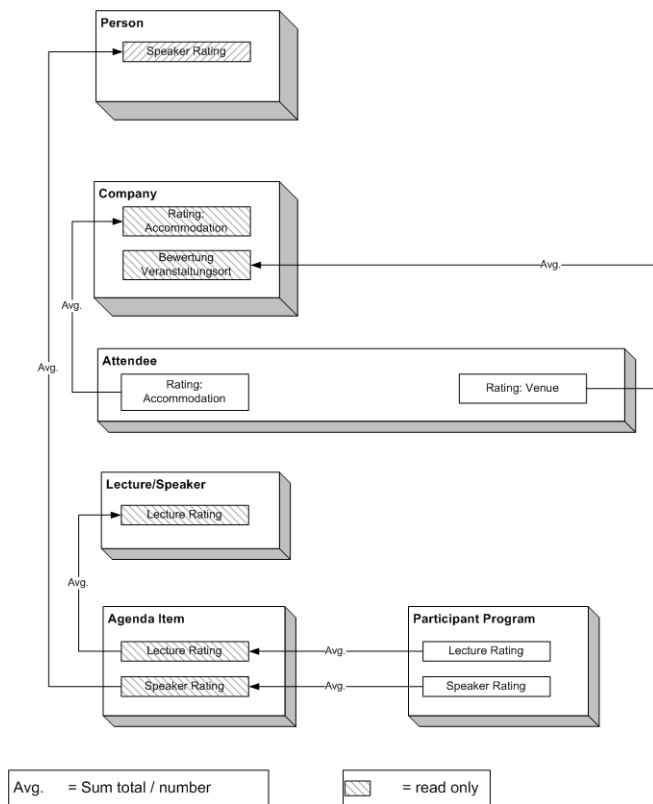
Equipment **Beamer** + ▾

Description _____

Costs _____ Currency _____ + ▾

Quantity **1** Equipment Unit _____ + ▾

the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.



3. To create the target groups and define the execution type, perform one of the following:

- Using the New Query button:

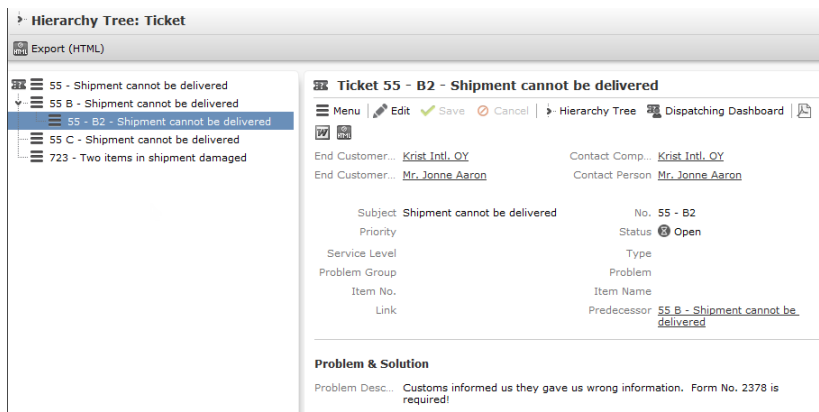
1. Click New Query to open the standard New: Query window.
2. Enter the **Query Name** and the **UQL syntax** for the query and run the query to get a list of entities for the target group. These are added to the target group.

Note: Instead of using an UQL, you can specify the infoarea, the fields to search, and the conditions by using the buttons in the Formatted and Conditions sections.

3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:

- Edit target group until – Specify the date until the target group can be updated based on the result of the query.
- Execution Type – Select the execution type from the drop-down list.

4. Click to open the **Create Target Group** step window.



If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.



5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below.

The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons is displayed in green. See the screenshot below.

Search Tickets

Search Results << < 1 - 5 of 24 >>

No.	Priority	Subject	Status	Created on	End Customer Co...	Problem	Processed by ID
1...	Medium	Monitor fl...	Open	19.04.2013	Gabrieli	Monitor	Peter Parker
123	Medium	Problem	Open	05.03.2014	SunTea	Maintenance	Kazuko Kanzaki

24.04 - 26.04.2014 New Activity

Reps	Thu 24.04.2014	Fri 25.04.2014	Sat 26.04.2014
	04 08 12 16 20	04 08 12 16 20	04 08 12 16
Chris Aki			
Dominik Landertinger			
John Doe			
Kazuko Kanzaki			
Simon Eder			
Stephen Smith			

Today: Tue 13 May, 2014

Group reps by No grouping

Ticket-related rep

Activity Defaults


Type Telephone

Subject

Duration

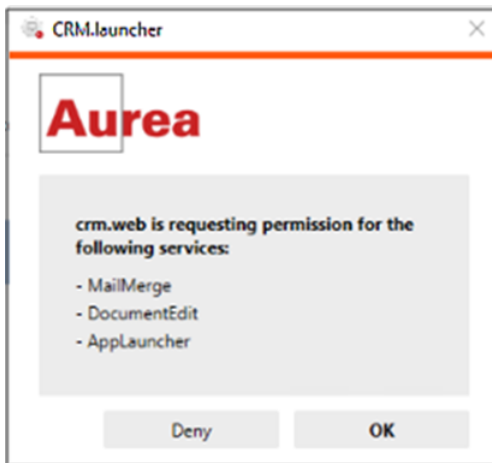
Unit

Purpose

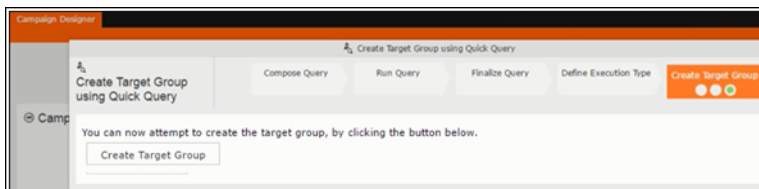
- To edit the target group click . The Edit Target Group window opens. You can use the search queries to add more recipients to the target group.

Note: The target group icon turns Red () after the “Until” date.

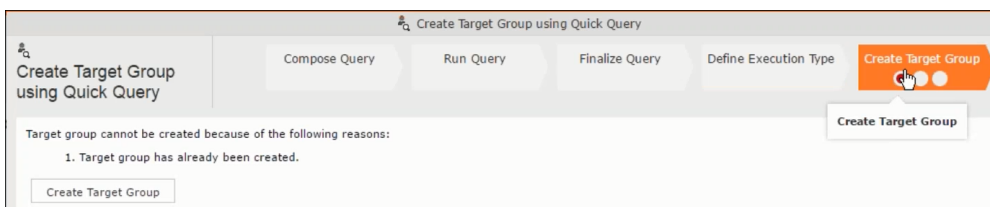
- To create the target groups and define the execution type using the New Quick Query option, perform one of the following:
 - Click the New Quick Query button from the Target Group & Execution Definition window. The Create Target Group using Quick Query window is opened.



2. Select the Root Info Area from the dropdown list.
3. Click **Run Query**. The query results are listed. Click Finalize Query.
4. Define if the query results are Private Query or Public Query. Enter a name in **Save As ...** field.
5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.



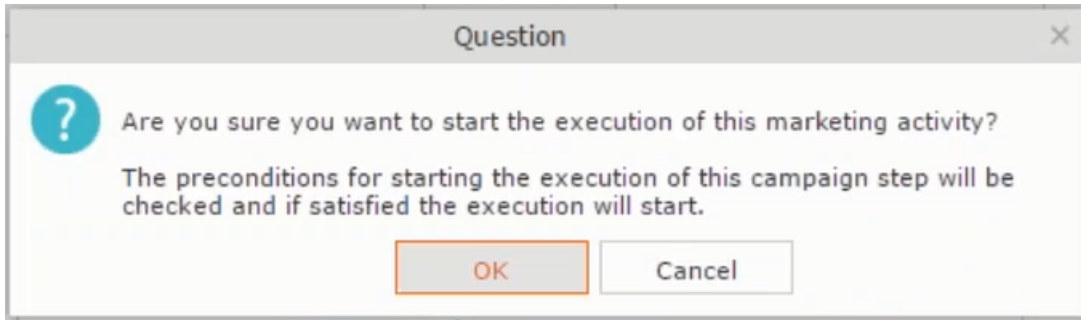
If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:



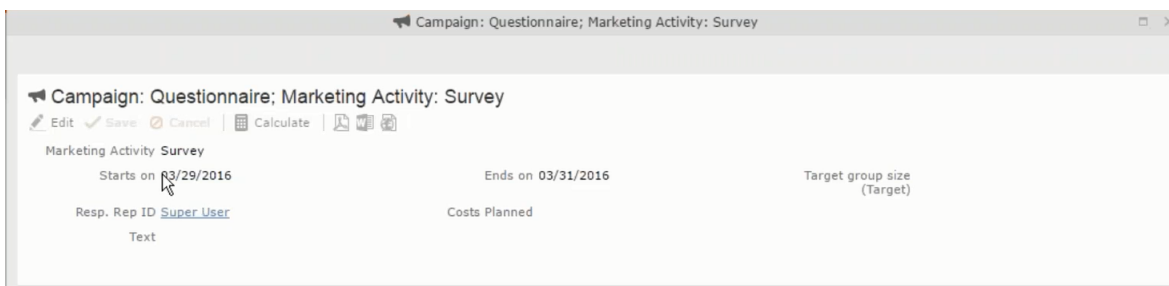
6. Click **Create Target Group** to complete creating the target group.

Selecting or modifying the target group

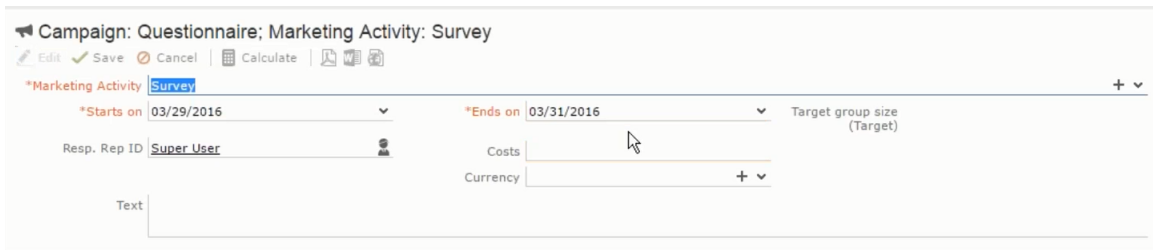
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
 - Click OK to expand the container.



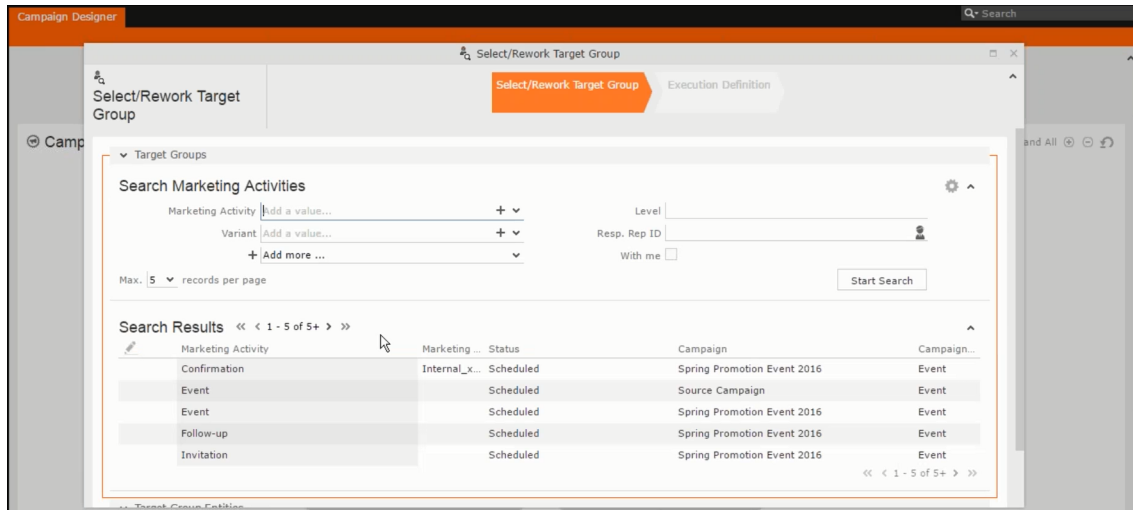
- Click the target group icon to open the **Target Group**



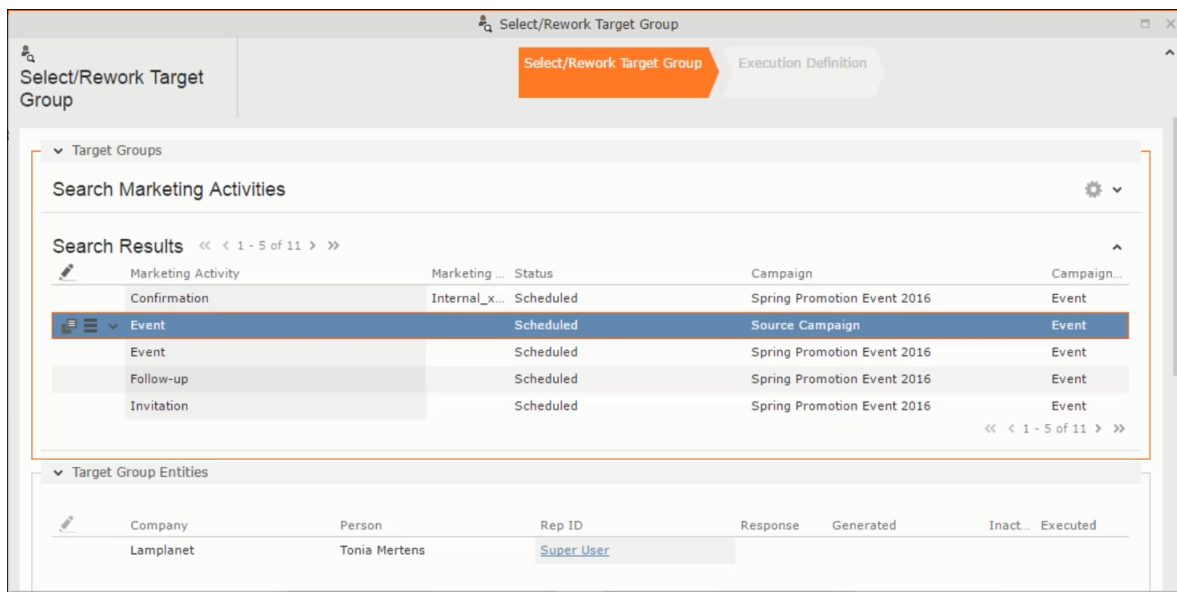
- and **Execution Definition** window.



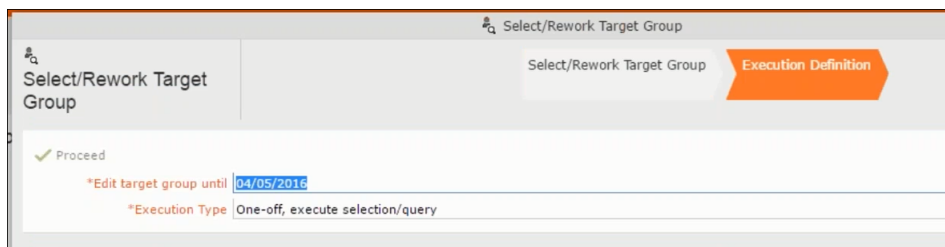
3. Click **Select/Rework Target Group**. The **Select/Rework Target Group** window displays.



4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.



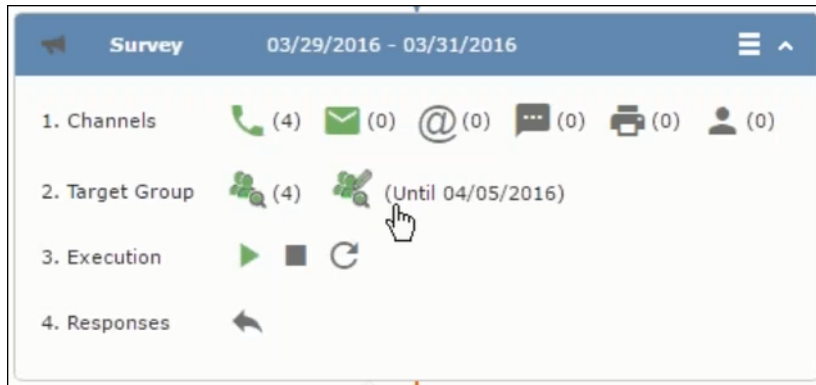
5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.



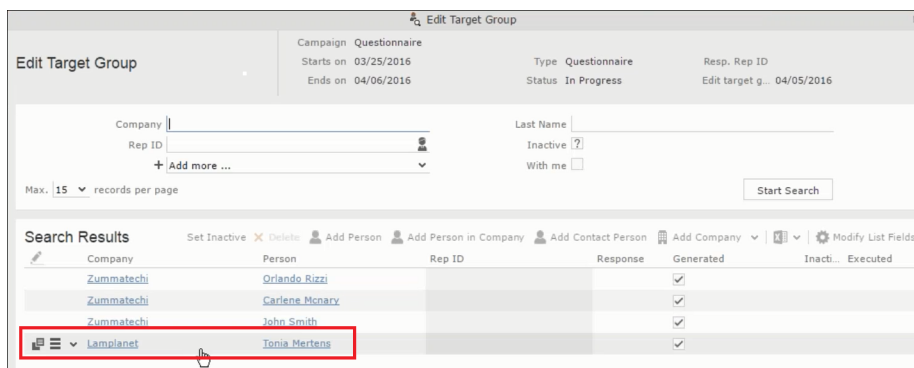
6. Specify the following information:

- **Edit target group until** – Specify the date until the target group can be updated.
- **Execution Type** – Select the execution type from the drop-down list.

7. Click Proceed. The campaign designer window opens.



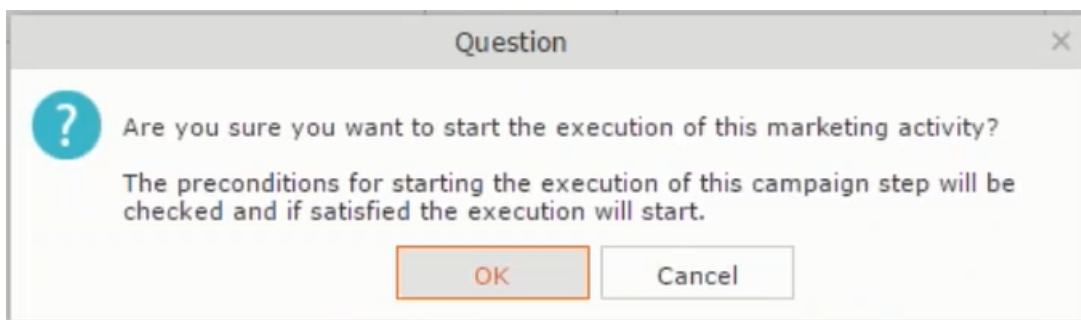
8. Click  to view the newly added participant to the target group.



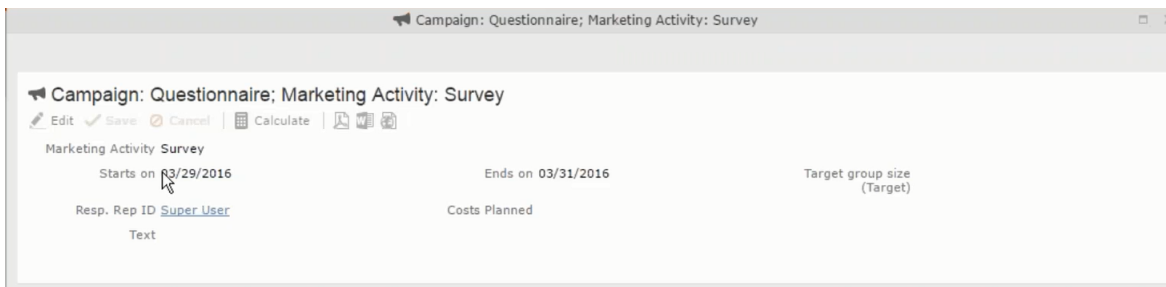
Defining Execution Type

To define an execution type, perform the following:

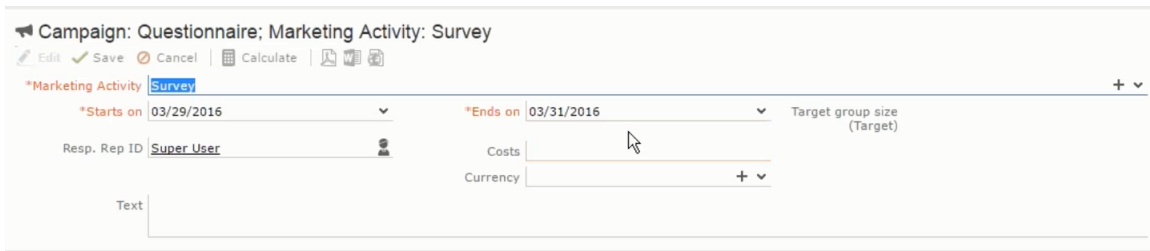
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
 - Click OK to expand the container.



- Click the target group icon to open the **Target Group**



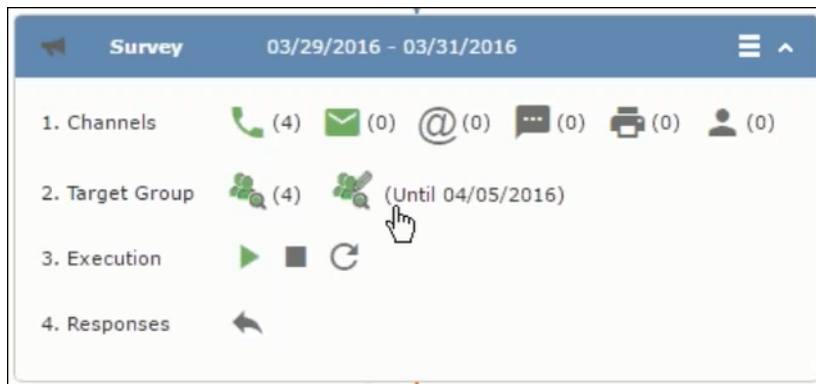
- and **Execution Definition** window.



3. Specify the following information:

- **Edit target group until** – Specify the date until the target group can be updated.
- **Execution Type** – Select the execution type from the drop-down list.

4. Click Proceed. The campaign designer window opens.



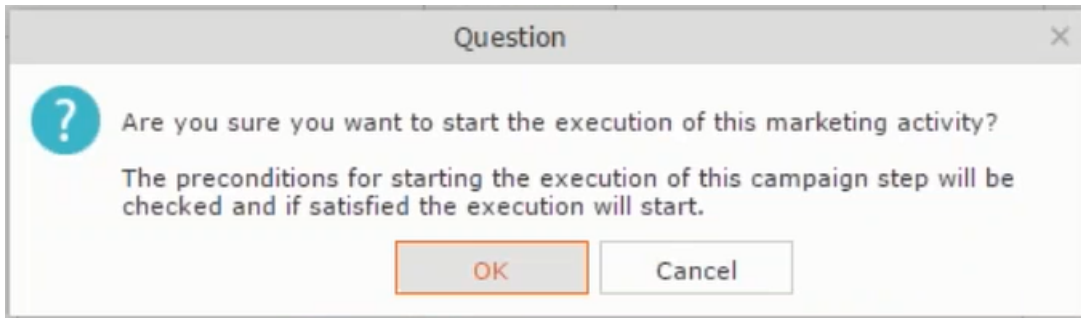
Executing a Marketing Activity

To execute a marketing activity, the following conditions should be met:

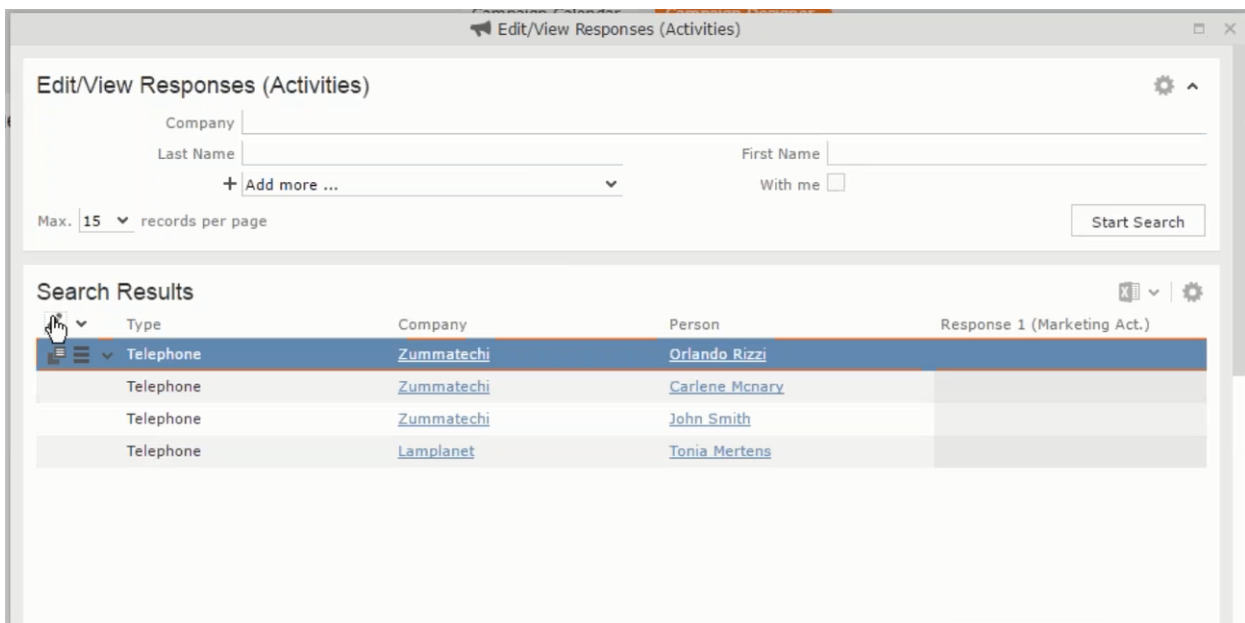
- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.
- The current date should be within the scope of the start and end dates of the campaign.
- The “Edit target group until date” has to be defined. This date is visible besides the edit target group icon (📅).

To execute a marketing activity, perform the following steps:

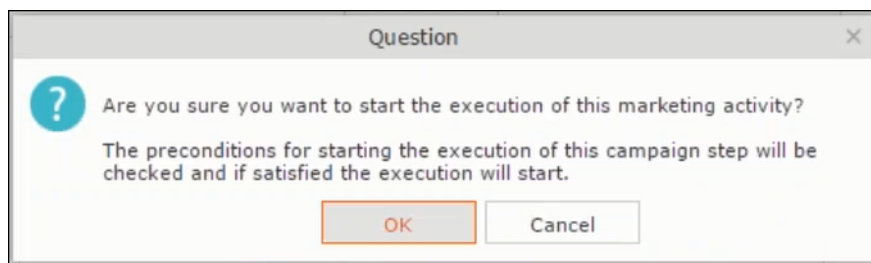
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
 - Click OK to expand the container.



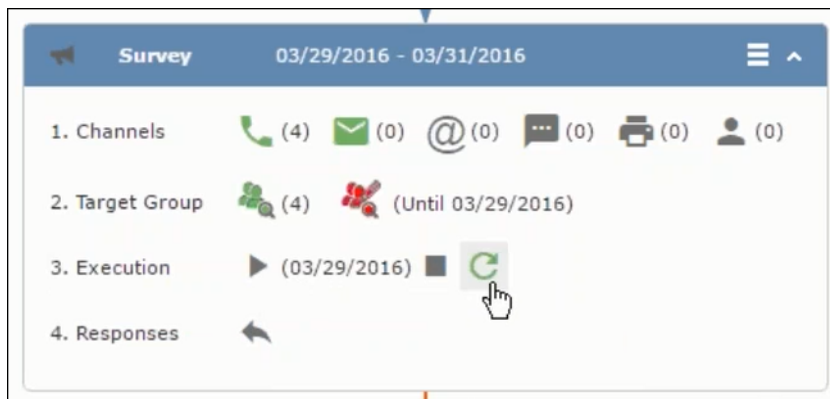
- The following screenshot shows the **Survey** marketing activity container.



3. Click the ► button on the **Execution** row. A query window pops up asking you to confirm the operation.



4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.




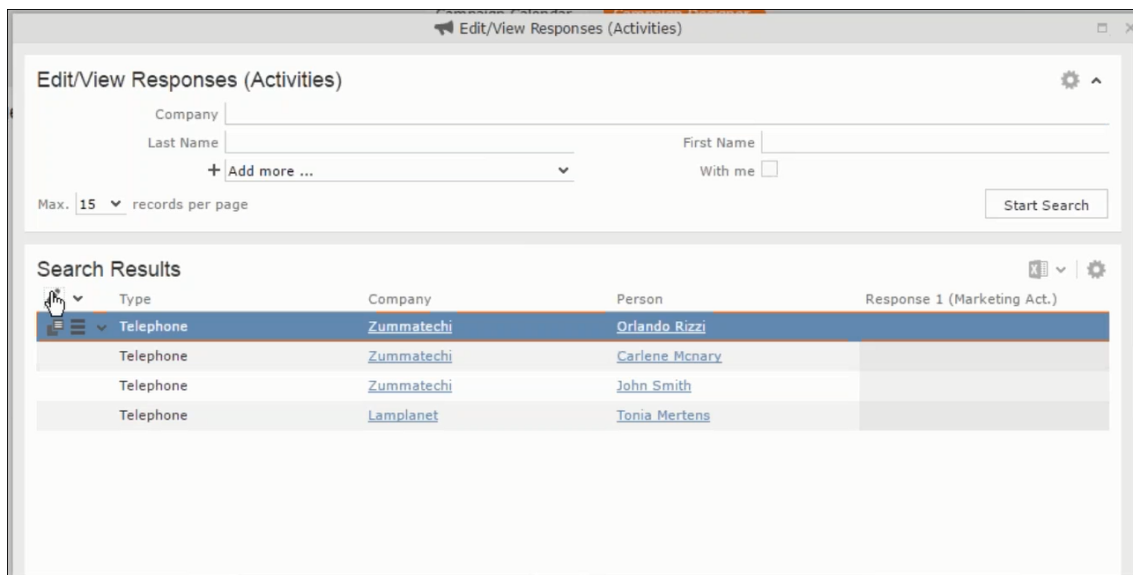
The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

Note: The edit target group icon is now in red (✂). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

Editing/Viewing the Responses for a Marketing Activity

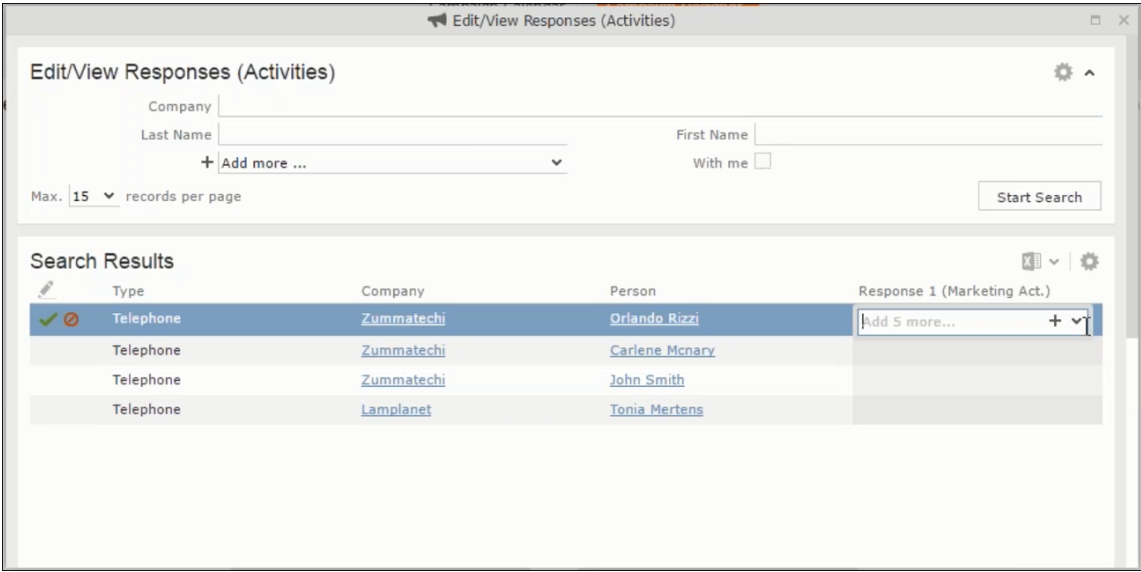
To edit or view the responses for a marketing activity, perform the following steps:

1. Click  icon in the responses row. The Edit/View Response (Activities) window opens.

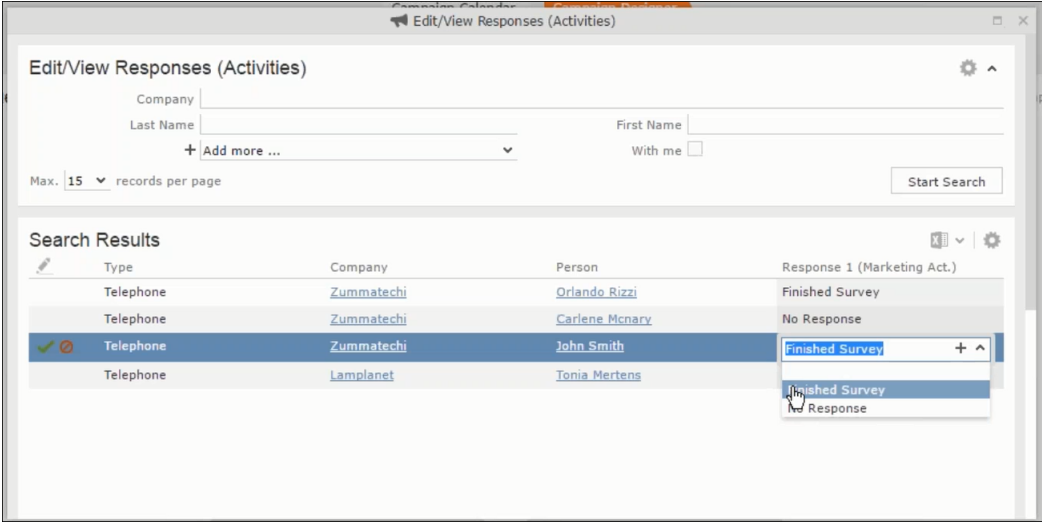


You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.

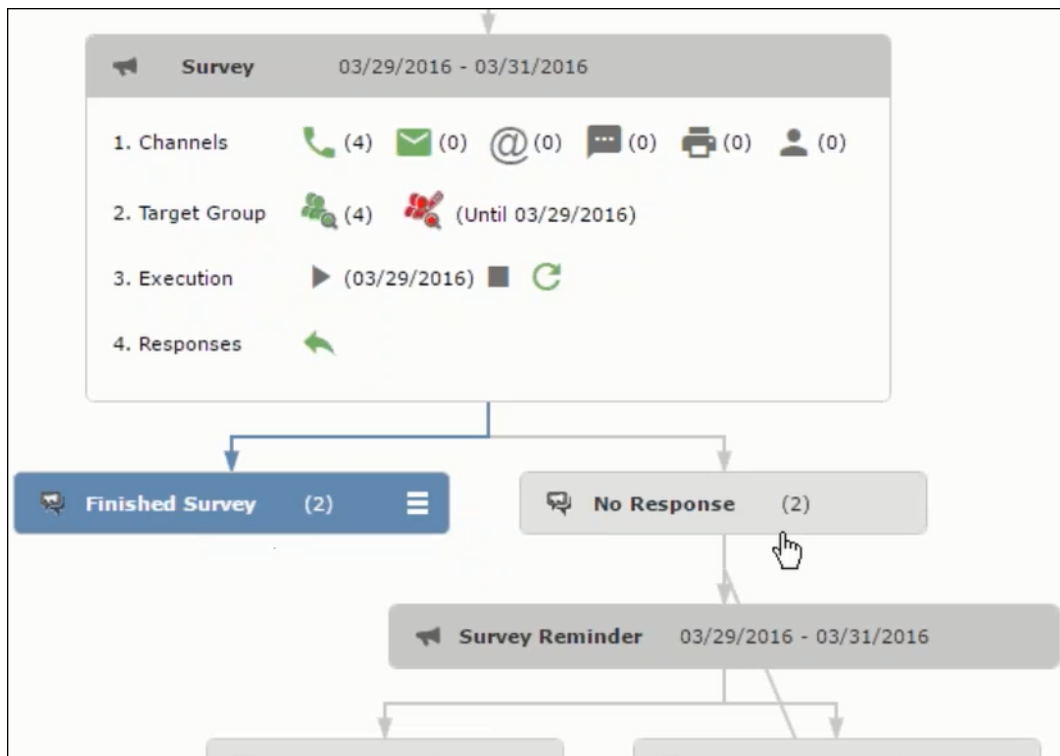


3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.



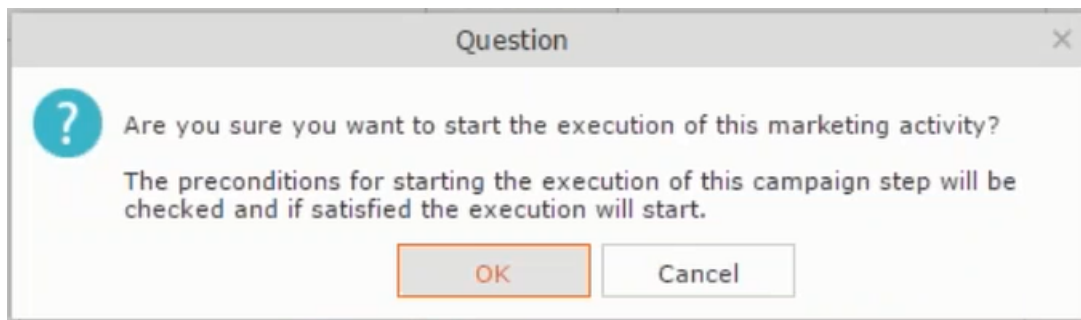
Edit the responses for all the participants.

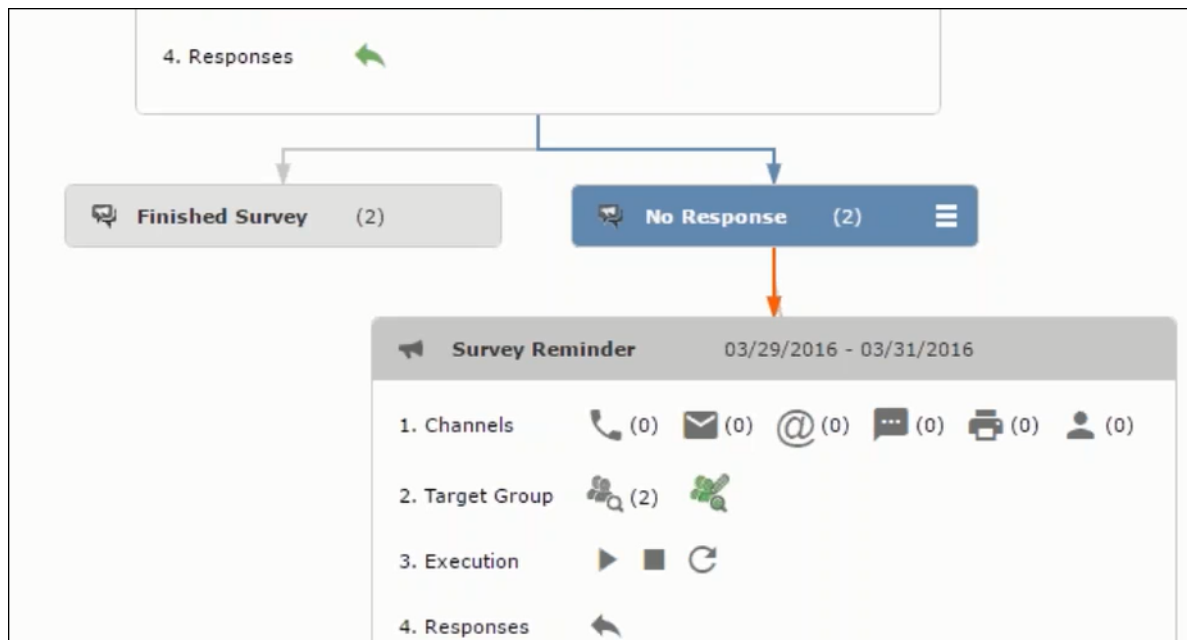
4. Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.



Notice the “(2)” in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

5. Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.





You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

6. Click  to open the **Edit Target Group** window for the **Survey Reminder** follow-up marketing activity.

The 'Edit Target Group' window shows search results for participants. The search criteria include Company, Rep ID, Last Name, Inactive, and With me. The search results table is as follows:

Company	Person	Rep ID	Response	Generated	Inacti...	Executed
Lamplanet	Tonia Mertens	Super User	No Response			
Zummatechi	Carlene McNary	Super User	No Response			

You can see that the two members with “No Response” in the **Response** column are listed.

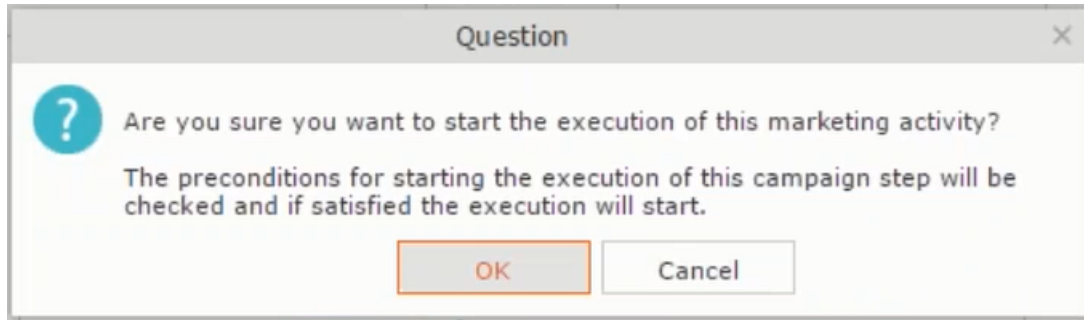
Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

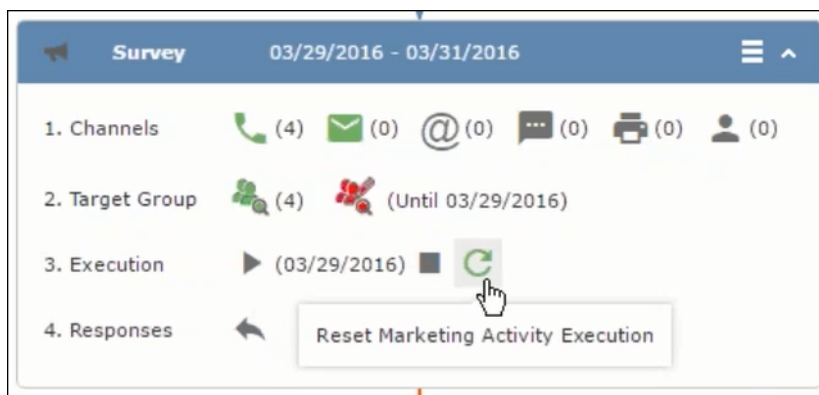
- All generated target group entities marked as “Generated” are deleted.
- The target group entities marked as “non Generated” are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:


1. Open the required campaign in the campaign designer.
2. On the marketing activity container, click to expand the container.

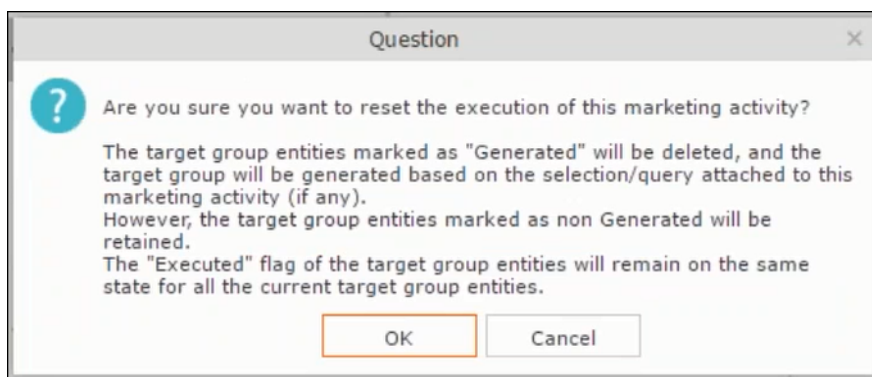


The following screenshot shows the **Survey** marketing activity container.

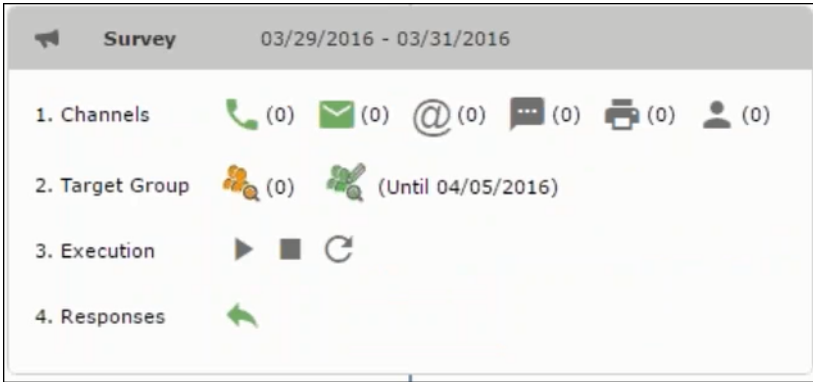


Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click  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.

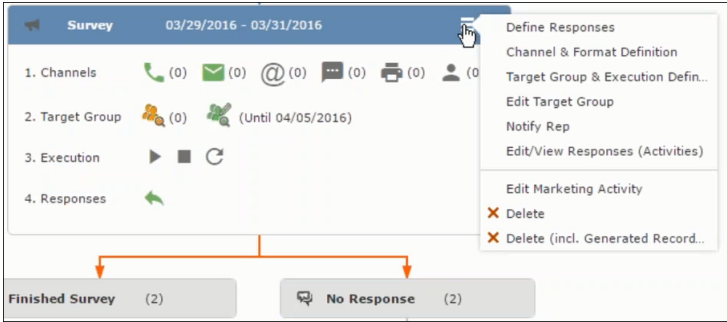


Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

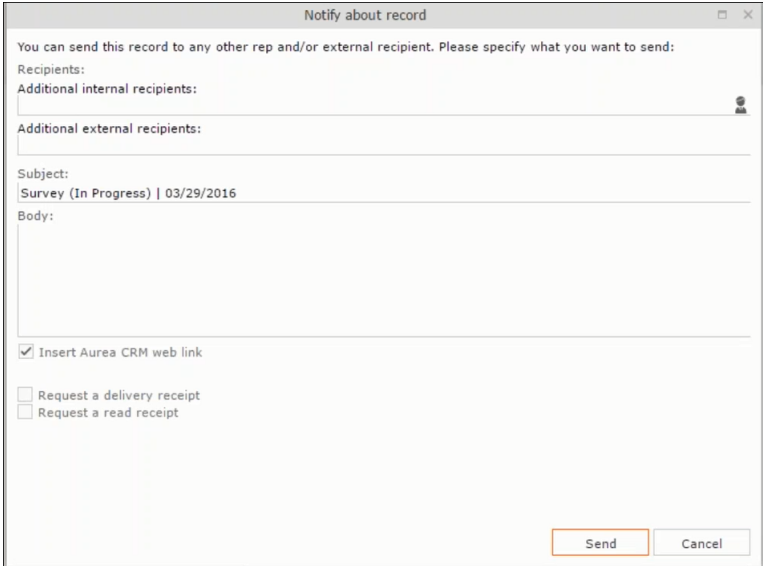
Notifying Reps about a marketing activity

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:

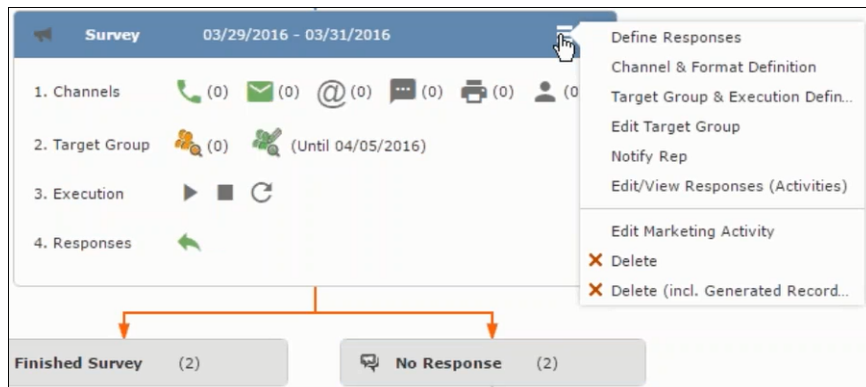
- **Recipients** – Add the internal and external recipients (reps) who receive the notification.
- **Subject** – Edit the subject of the notification email in this text field. You can also use the automatically generated subject.
- **Body** – Enter the notification content in the Body field.
- **Insert 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.

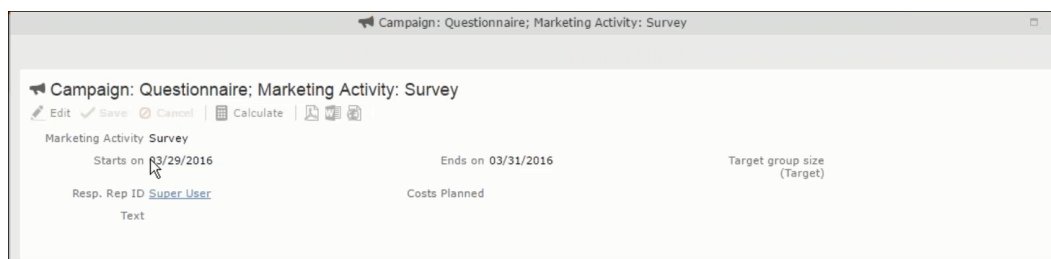
Editing a Marketing Activity

To edit a marketing activity, perform the following:

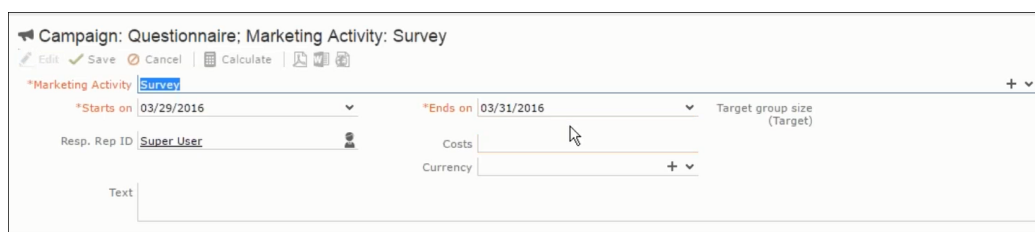
1. Open the required campaign in the campaign designer.
2. From the context menu of a marketing activity container, select **Edit Marketing Activity**.



3. The marketing activity window opens.



4. Click Edit to start editing the marketing activity.

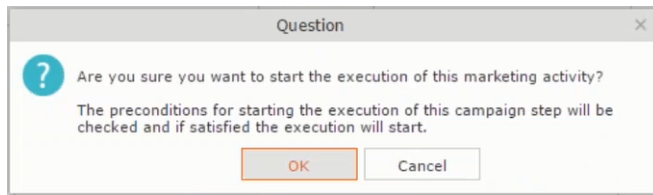


5. Make the required changes and click **Save**.

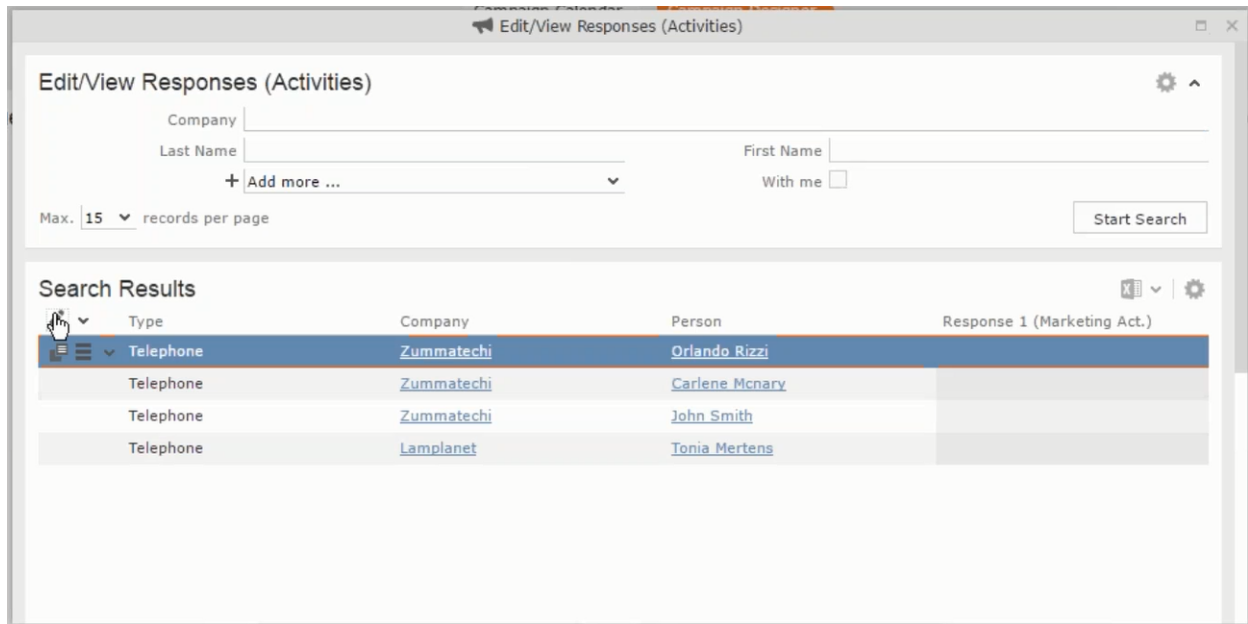
Defining Channels and Formats used in a Marketing Activity

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.



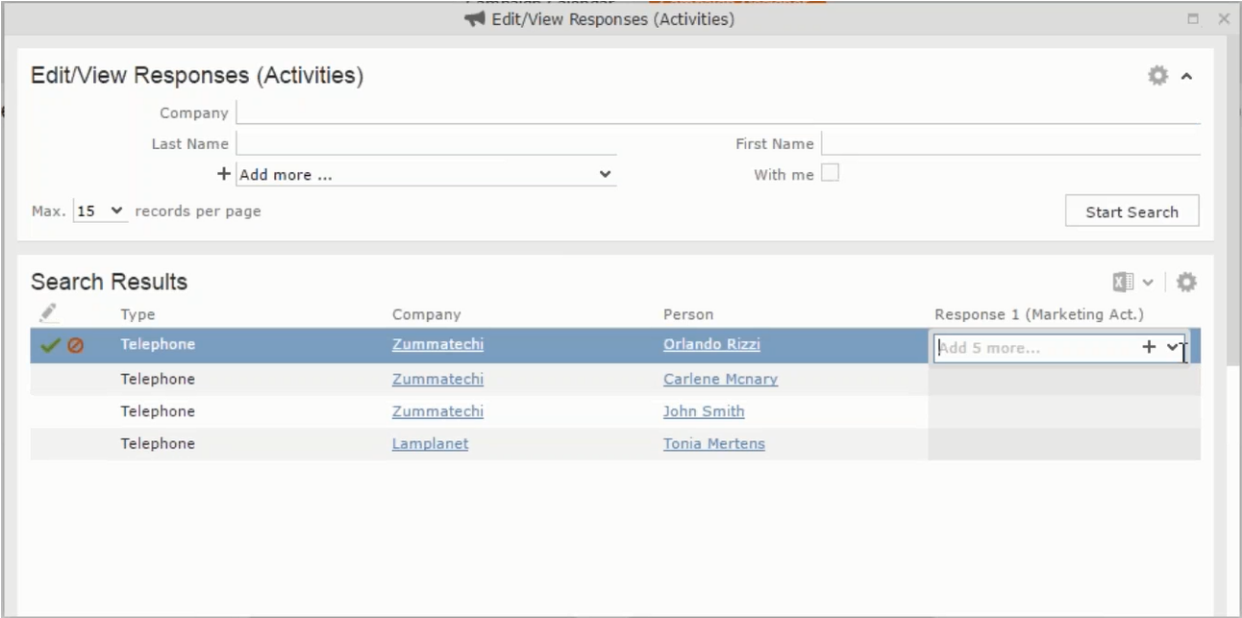
The following screenshot shows the **Survey** marketing activity container.



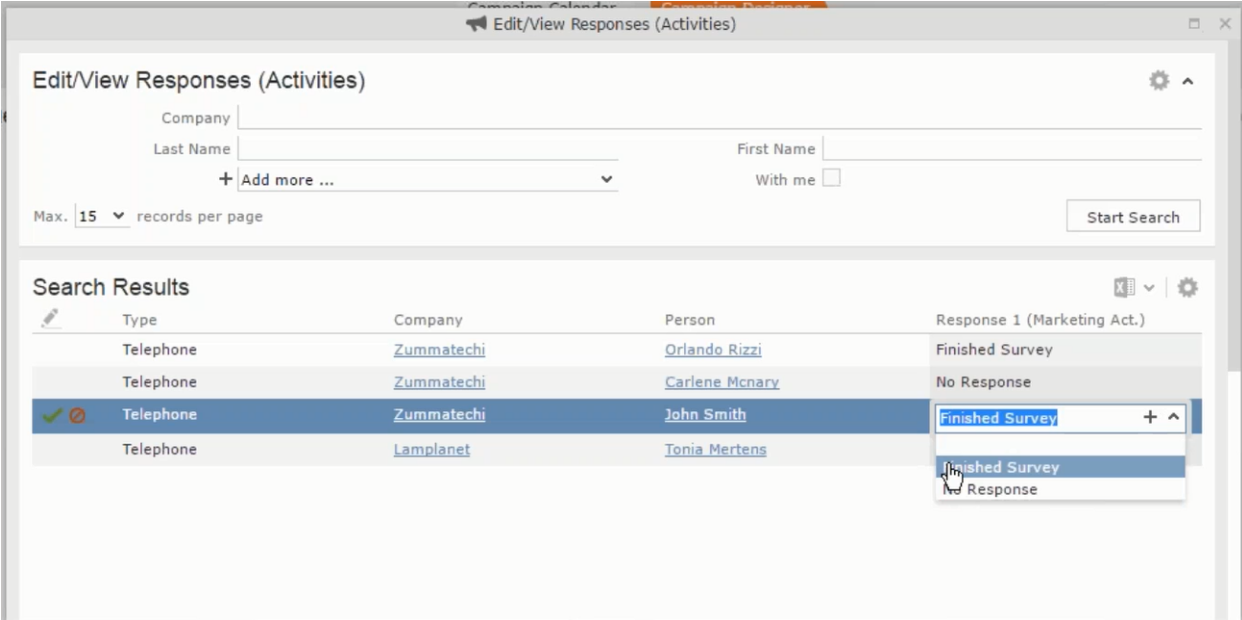
The following is a brief description of the components of a marketing activity:

Channels - The first row shows the available channels of communication for a marketing activity. The following channels are available:

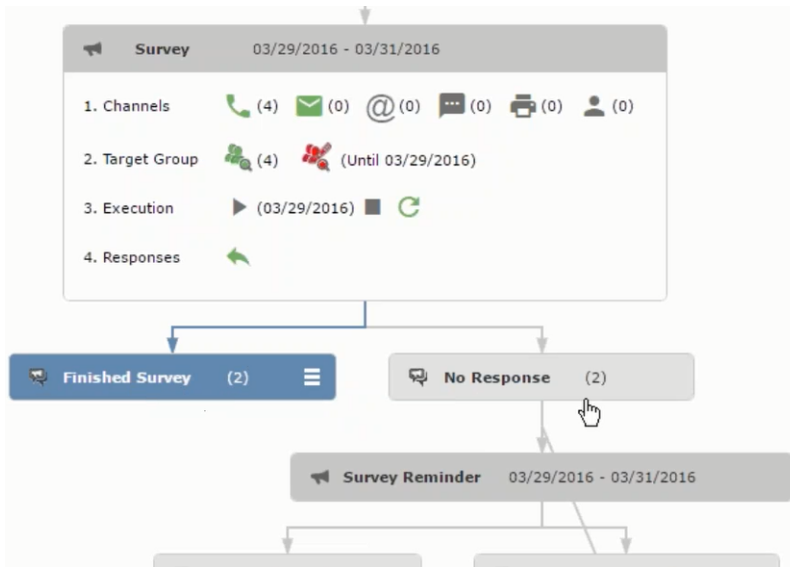
- Phone



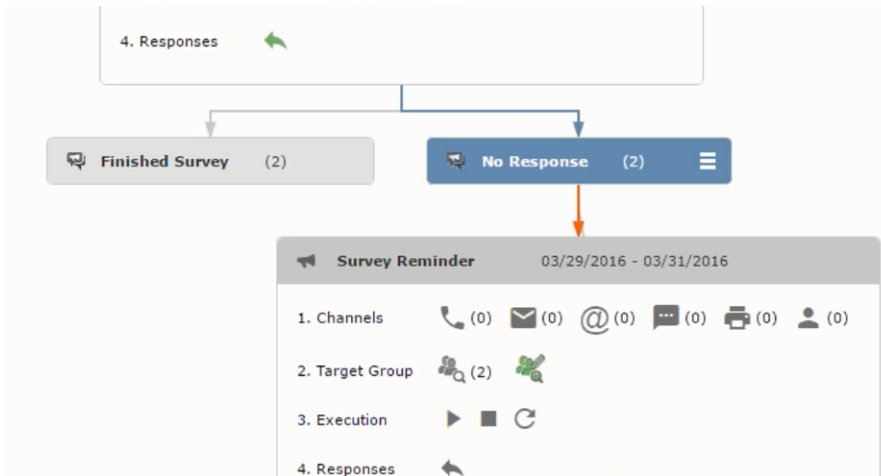
- Letter



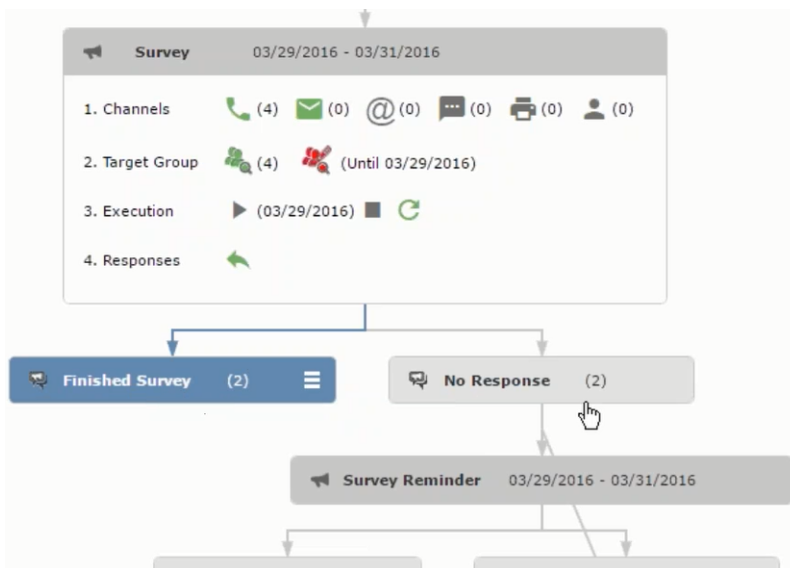
- Email



- SMS



- Fax



- In-person

Company	Person	Rep ID	Response	Generated	Inacti...	Executed
Lamplanet	Tonia Mertens	Super User	No Response			
Zummatechi	Carlene McNary	Super User	No Response			

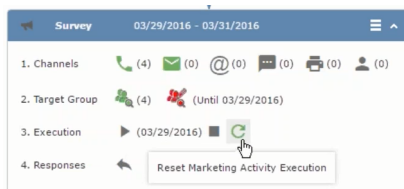
The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

Target Group – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

Execution – In this step, you can execute and start the marketing activity.

Responses – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.



The channel and format definition process contains three phases: **Define Channel(s) > Define Format > Define Default Values**. The window opens on the **Define Channel(s)** phase.

- **Define Channels** – In this phase you can select the channels that are used to approach the customers for the marketing activities.
- **Define Format** – In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.
- **Define Default values** – You can define the default values for the marketing activities that are generated.

4. Provide the following information in the **Define Channel(s)** phase:

Format Definition

- **Format Name** – You can give a name to the format definition or retain the automatically generated name. This field is mandatory.
- **Lock** – Select this check box to lock the message format for the marketing activity.
- **Private** - Select this check box to keep the message generated for the marketing activity private.

Preferred Channels

- **Fixed** – You can select one fixed channel.

Note: You cannot select variable channel, if you select a fixed channel.

- **Variable (Priority)** – You can select multiple channels with variable priorities for the channels.
- **Generate** – This selection generates activities for all entities to represent the successful generation during the marketing activity execution. This is selected by default and cannot be changed.

Save Channel(s) – Click this button to save the Channel format details you configured on this page.

Load Format – Click this button to open the Channel Formats search window. Select the required format previously created, from the search result and load it. You can then edit the format as required.

Proceed – Click this button to go to the next step, **Define Format**.

Note: If you have not saved the channel definition, you are prompted to save the channel configuration details before proceeding.

5. Click **Save Channel(s)**. Click **Proceed** to open the **Define Format** window.

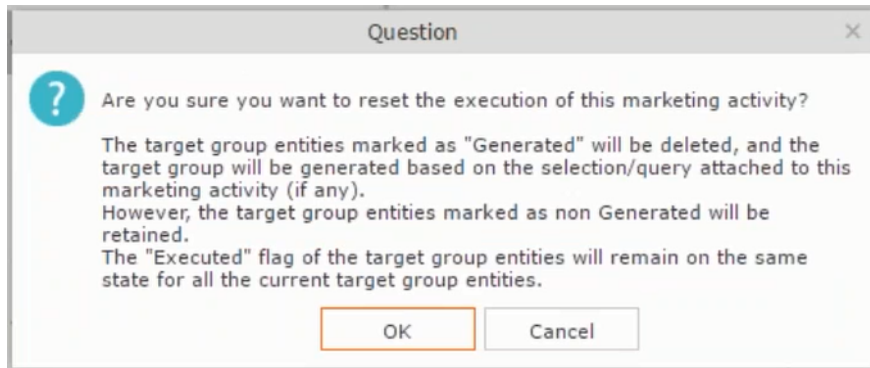


The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

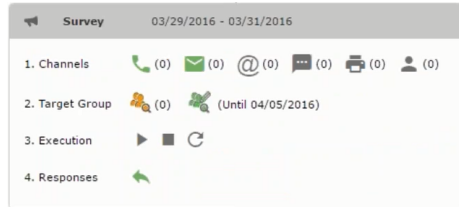
Note: The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window.

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.

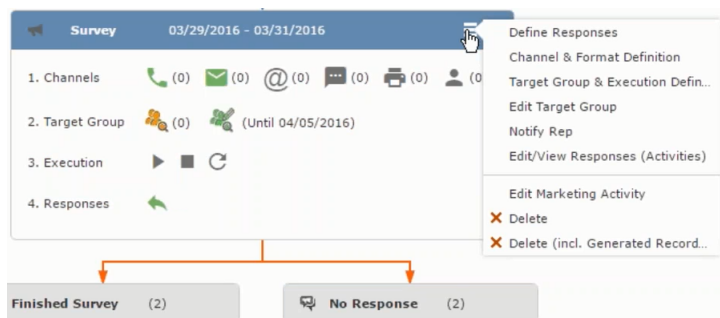
If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.



- 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.



- After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.



You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

8. After entering the default values, click **Save Default Values** and then click **Proceed**. You are returned to the campaign designer window.

Notify about record

You can send this record to any other rep and/or external recipient. Please specify what you want to send:

Recipients:

Additional internal recipients:

Additional external recipients:

Subject:
Survey (In Progress) | 03/29/2016

Body:

Insert Aurea CRM web link

Request a delivery receipt

Request a read receipt

Send Cancel

Notice that the Phone and Letter channels icons are now in green.

Adding the Target Group and Execution Definition

To define the channels and formats for a marketing activity, perform the following steps:

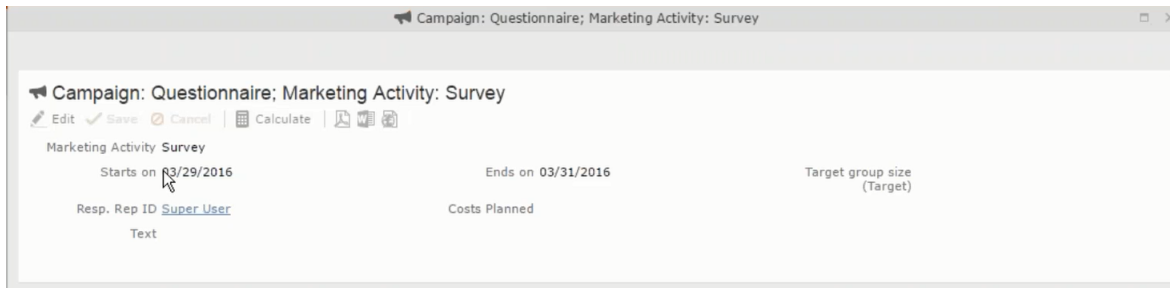
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
 - Click to expand the container.

Question

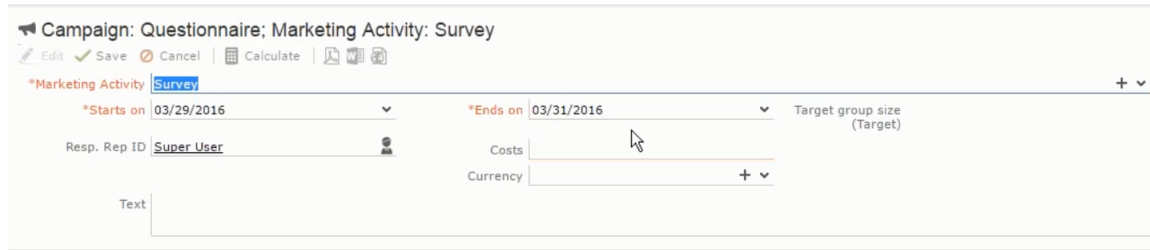
Are you sure you want to start the execution of this marketing activity?
The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.

OK Cancel

- Click the target group icon to open the **Target Group**.



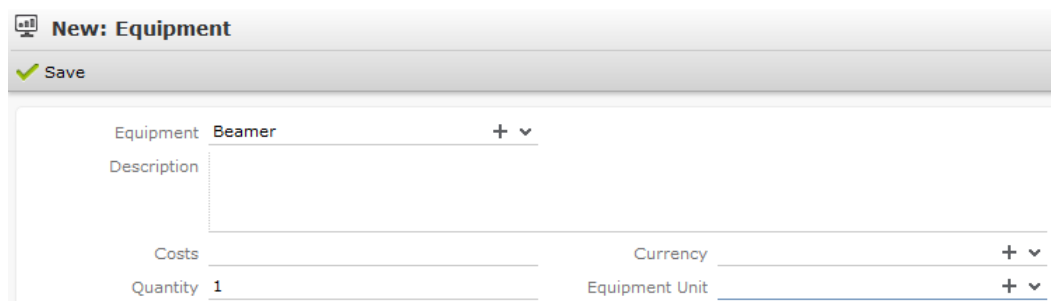
and **Execution Definition** window.



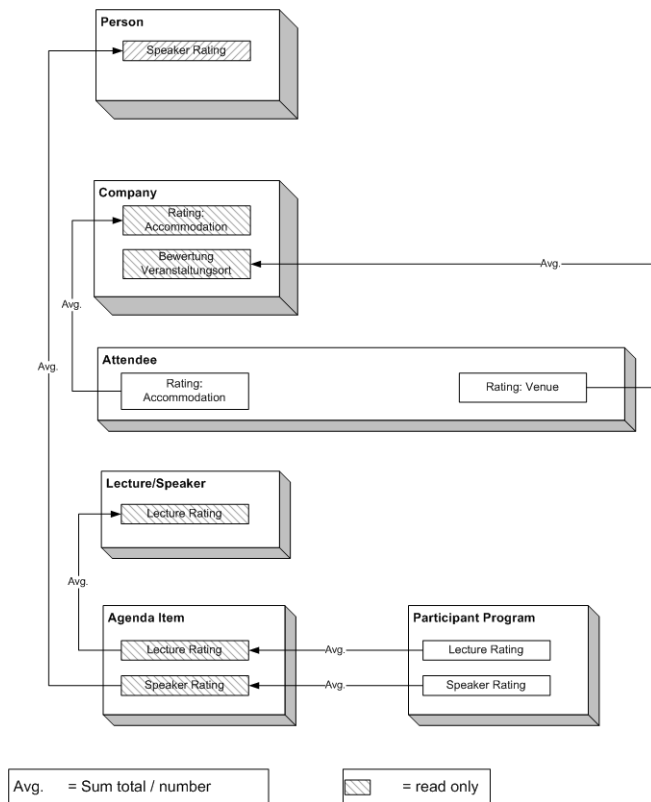
You can create the target group and define execution type using the following buttons:

- **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:

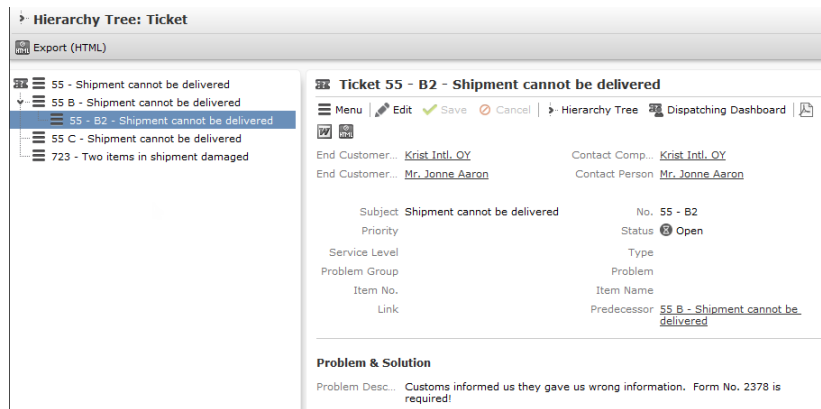
1. Click New Query to open the standard New: Query window.
2. Enter the **Query Name** and the **UQL syntax** for the query and run the query to get a list of entities for the target group. These are added to the target group.

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.

The screenshot displays the 'Search Tickets' interface. At the top, there is a search bar and a 'Search Results' section showing a list of tickets. The second ticket is highlighted, showing details like 'No. 123', 'Priority Medium', 'Subject Problem', 'Status Open', 'Created on 05.03.2014', 'End Customer Co... SunTea', 'Problem Maintenance', and 'Processed by ID Kazuko Kanzaki'.

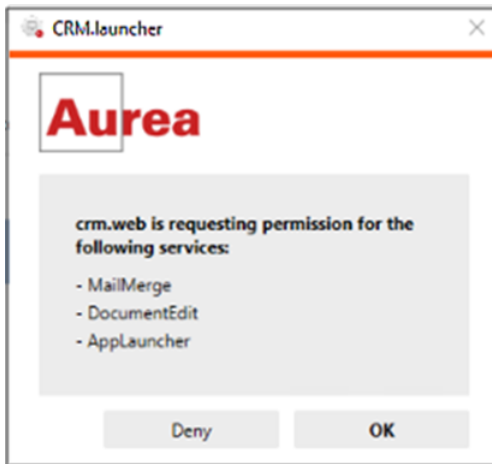
Below the search results is a calendar view for the period '24.04 - 26.04.2014'. The calendar shows a grid of days with a 'Reps' column on the left. The 'Reps' column lists several representatives: Chris Aki, Dominik Landertinger, John Doe, Kazuko Kanzaki, Simon Eder, and Stephen Smith. The calendar grid shows activity slots for Thursday (24.04.2014), Friday (25.04.2014), and Saturday (26.04.2014). A red icon is visible in the slot for Friday, 25.04.2014, at 12:00.

On the left side of the calendar, there are several settings and filters, including 'Today: Tue 13 May, 2014', 'Group reps by No grouping', 'Ticket-related rep', and 'Activity Defaults' with fields for Type, Subject, Duration, Unit, and Purpose.

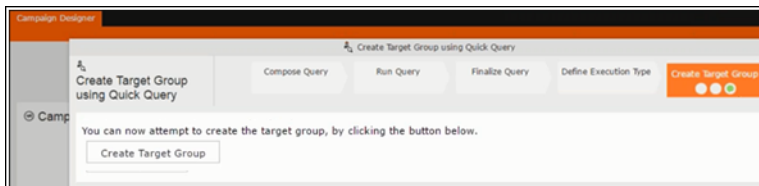
6. To edit the target group click . The Edit Target Group window opens. You can use the search queries to add more recipients to the target group.

Note: The target group icon turns Red () after the “Until” date.

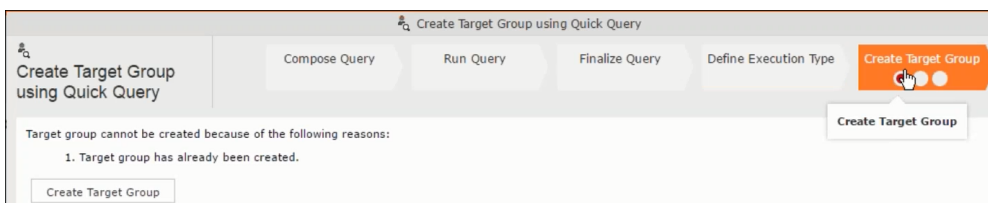
- To create the target groups and define the execution type using the New Quick Query option, perform one of the following:
 - Click the New Quick Query button from the Target Group & Execution Definition window. The Create Target Group using Quick Query window is opened.



2. Select the Root Info Area from the dropdown list.
3. Click **Run Query**. The query results are listed. Click Finalize Query.
4. Define if the query results are Private Query or Public Query. Enter a name in **Save As ...** field.
5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.



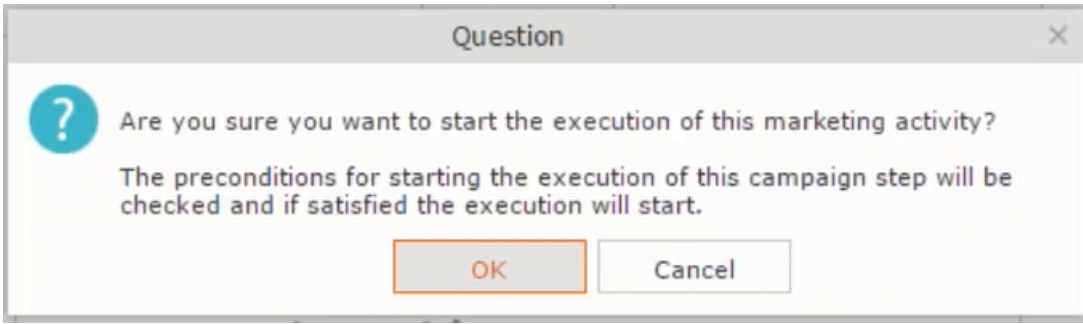
If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:



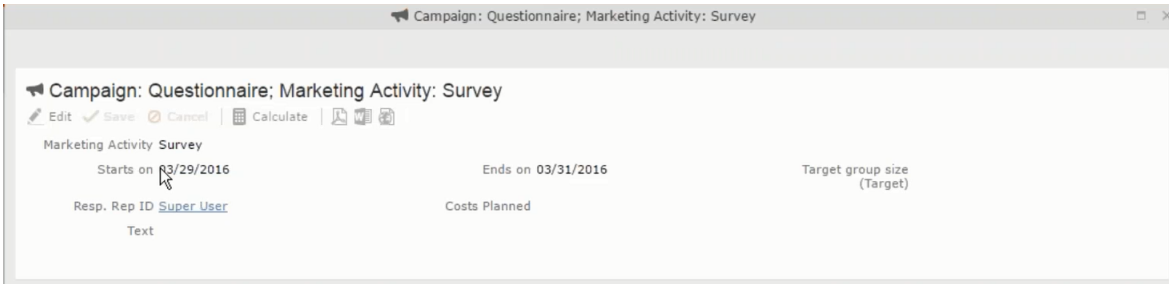
6. Click **Create Target Group** to complete creating the target group.

Selecting or modifying the target group

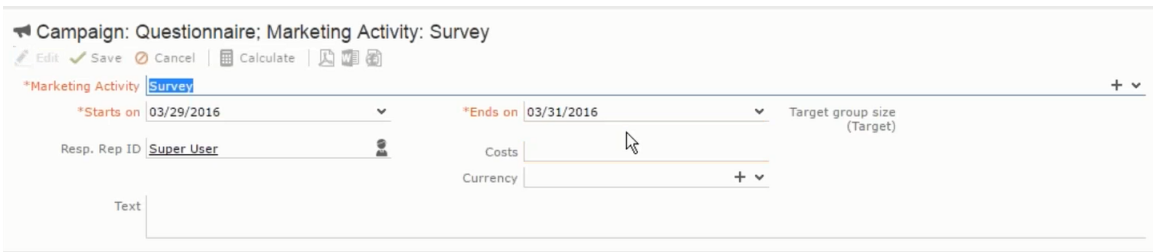
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
 - Click OK to expand the container.



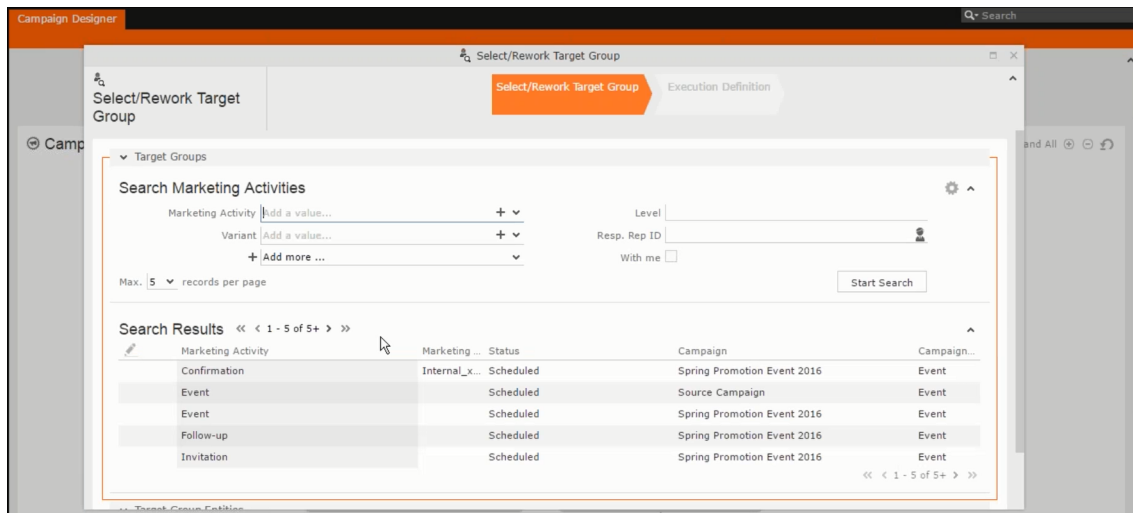
- Click the target group icon to open the **Target Group**



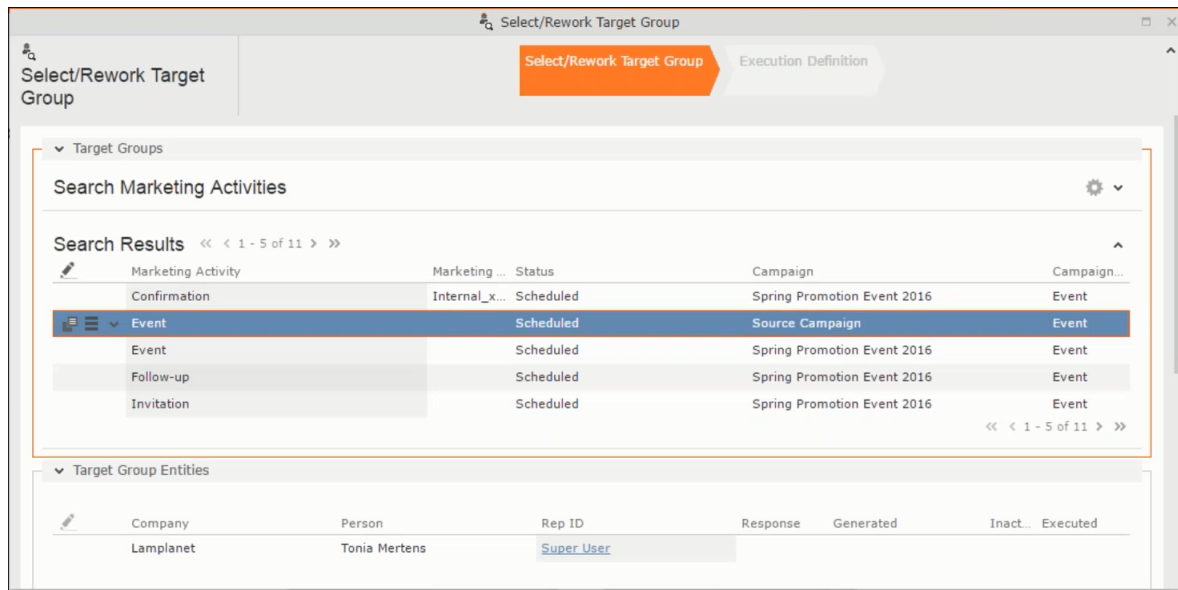
- and **Execution Definition** window.



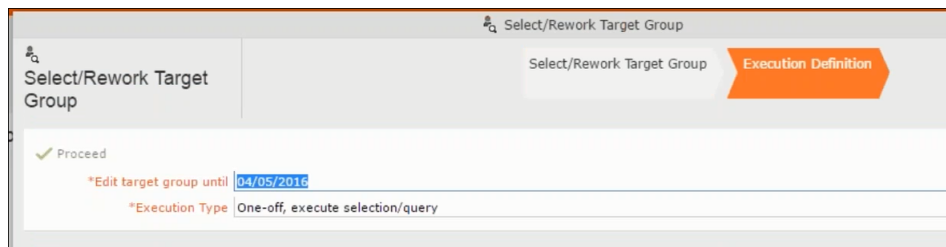
3. Click **Select/Rework Target Group**. The **Select/Rework Target Group** window displays.



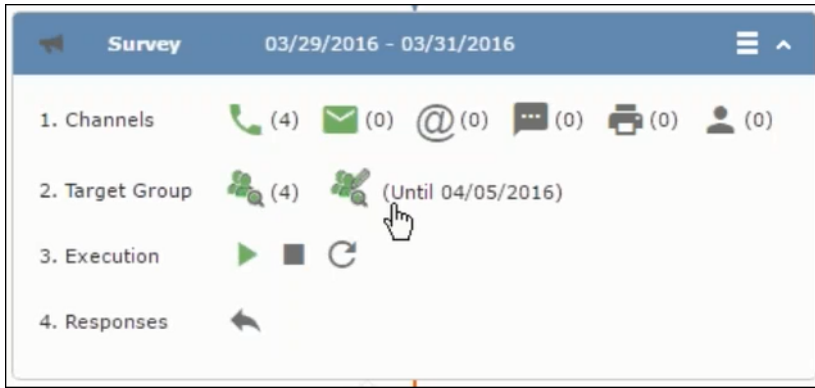
4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.



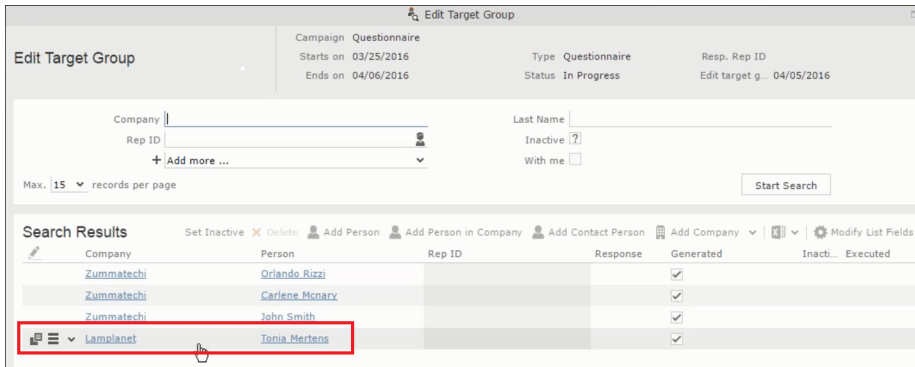
5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.



6. Specify the following information:
- **Edit target group until** – Specify the date until the target group can be updated.
 - **Execution Type** – Select the execution type from the drop-down list.
7. Click Proceed. The campaign designer window opens.



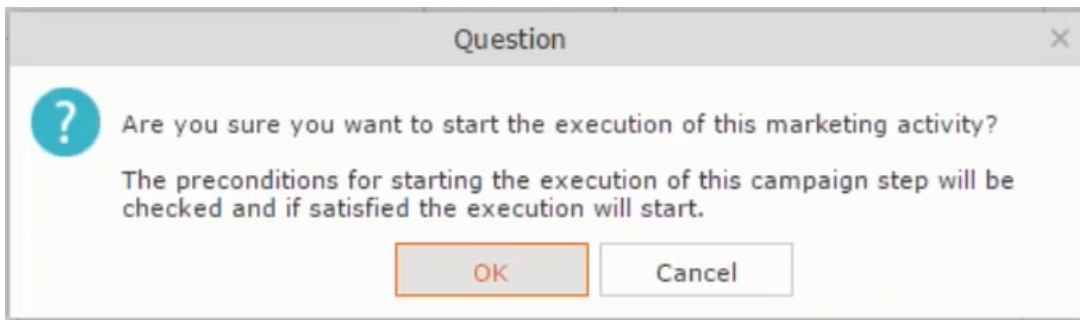
8. Click  to view the newly added participant to the target group.



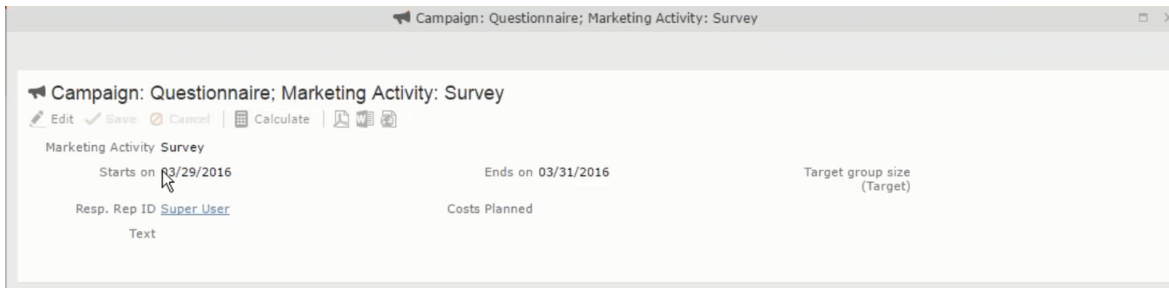
Defining Execution Type

To define an execution type, perform the following:

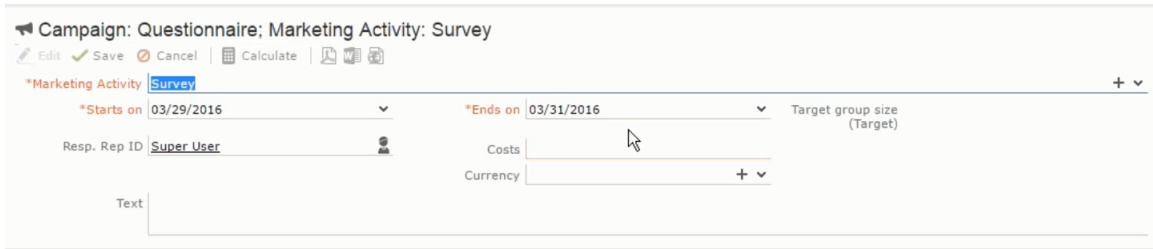
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
 - Click OK to expand the container.



- Click the target group icon to open the **Target Group**



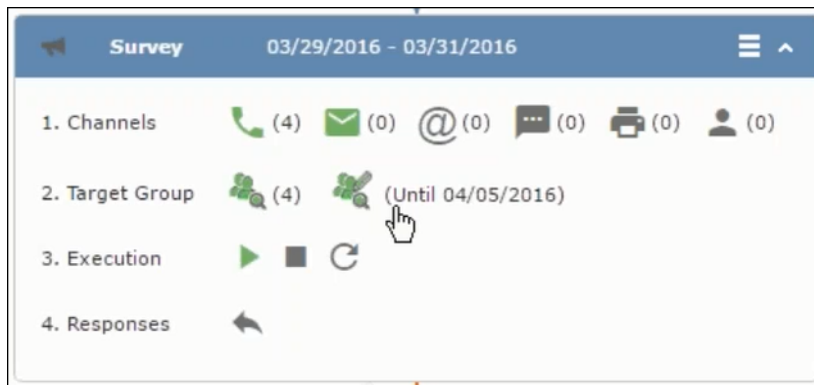
- and **Execution Definition** window.



3. Specify the following information:

- **Edit target group until** – Specify the date until the target group can be updated.
- **Execution Type** – Select the execution type from the drop-down list.


4. Click Proceed. The campaign designer window opens.



Executing a Marketing Activity

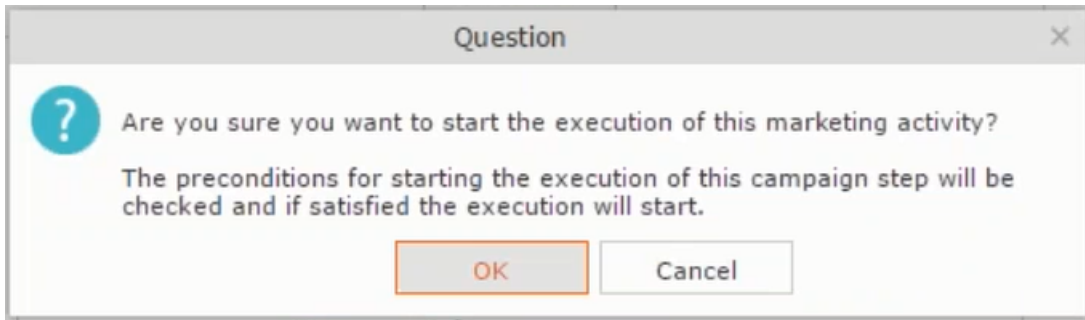
To execute a marketing activity, the following conditions should be met:

- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.

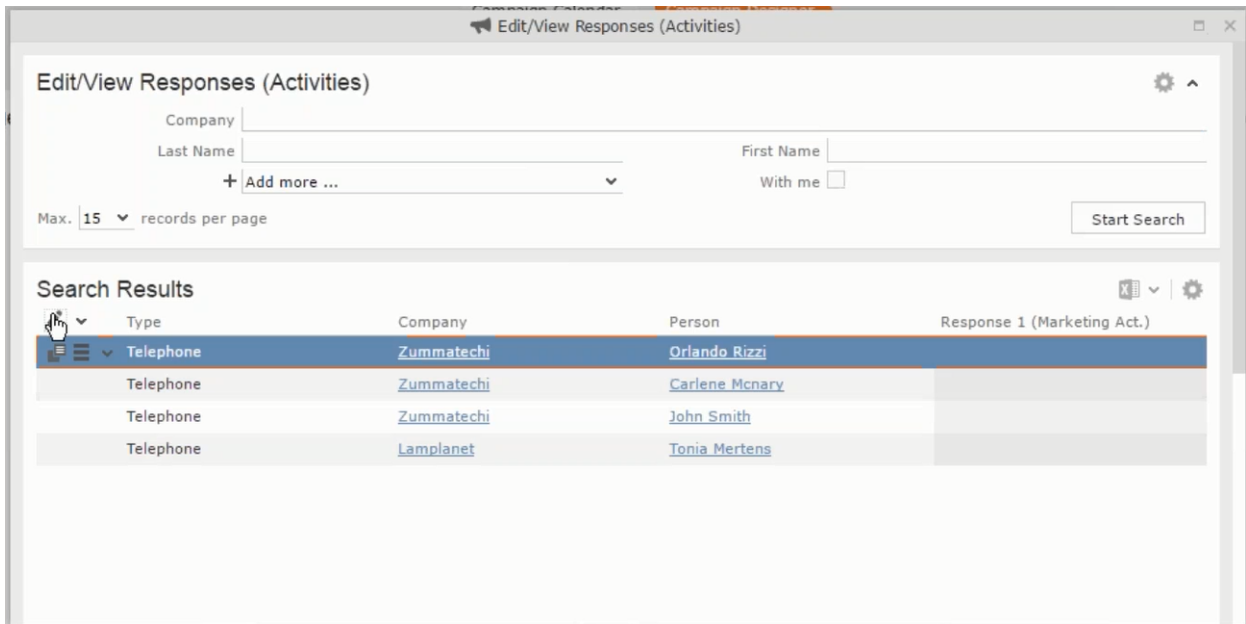
- The current date should be within the scope of the start and end dates of the campaign.
- The “Edit target group until date” has to be defined. This date is visible besides the edit target group icon ().

To execute a marketing activity, perform the following steps:

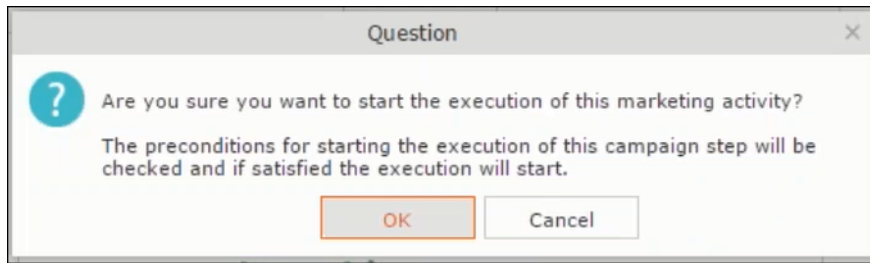
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
 - Click OK to expand the container.



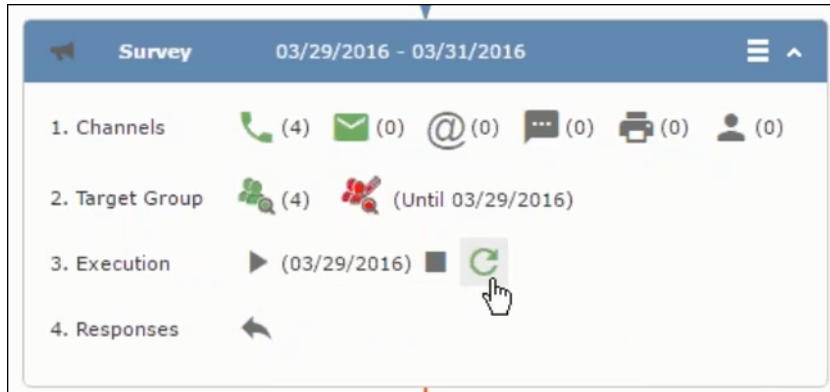
- The following screenshot shows the **Survey** marketing activity container.



3. Click the ► button on the **Execution** row. A query window pops up asking you to confirm the operation.



4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.




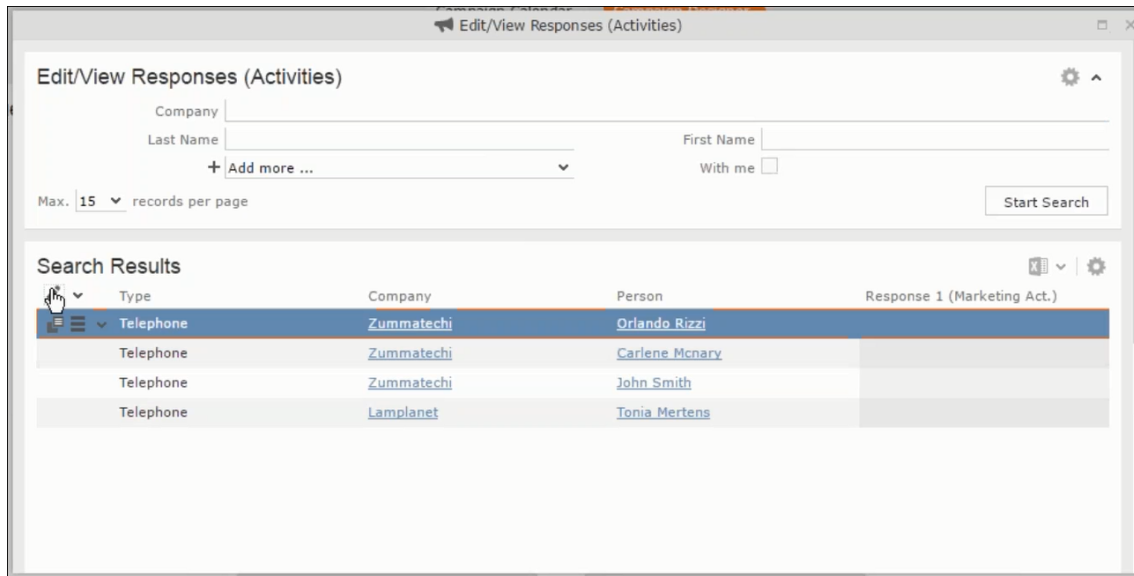
The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

Note: The edit target group icon is now in red (✂). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

Editing/Viewing the Responses for a Marketing Activity

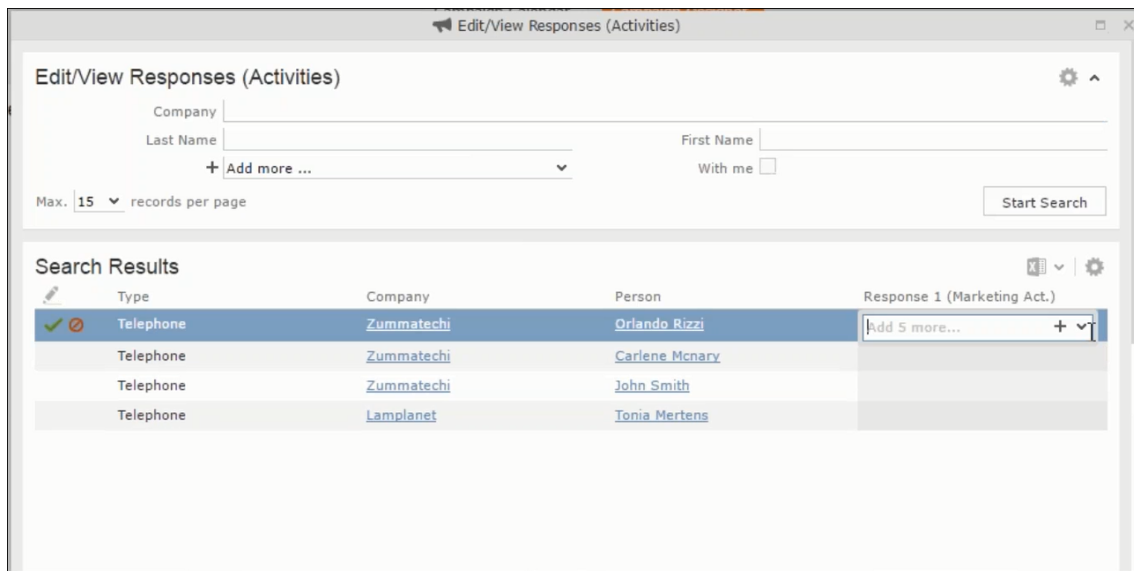
To edit or view the responses for a marketing activity, perform the following steps:

1. Click  icon in the responses row. The Edit/View Response (Activities) window opens.

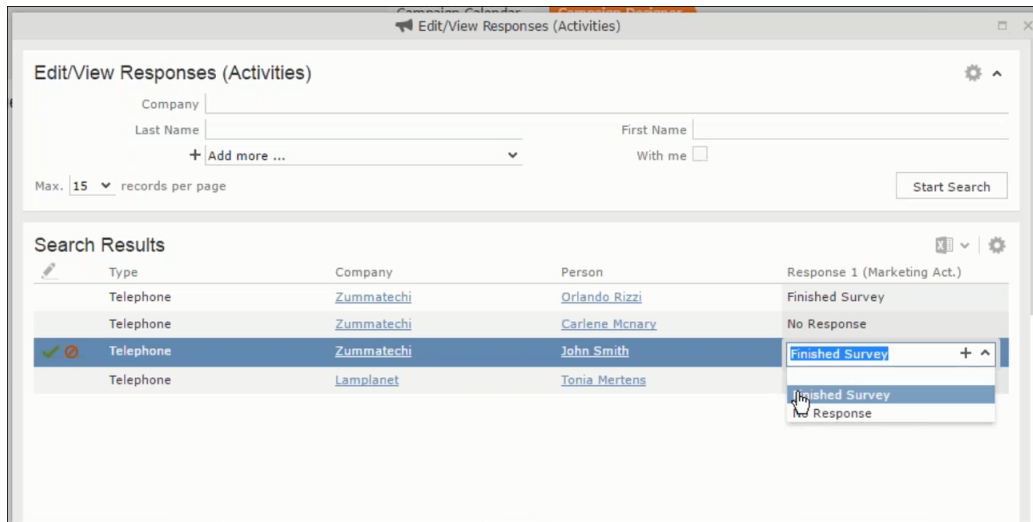


You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.

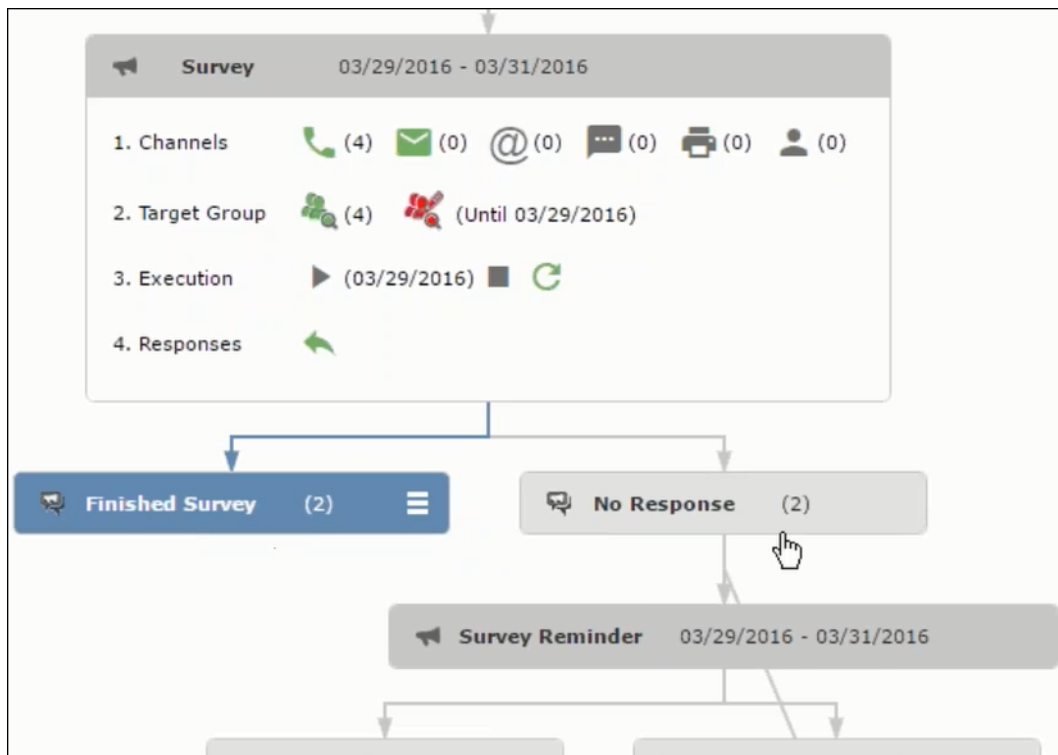


3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.



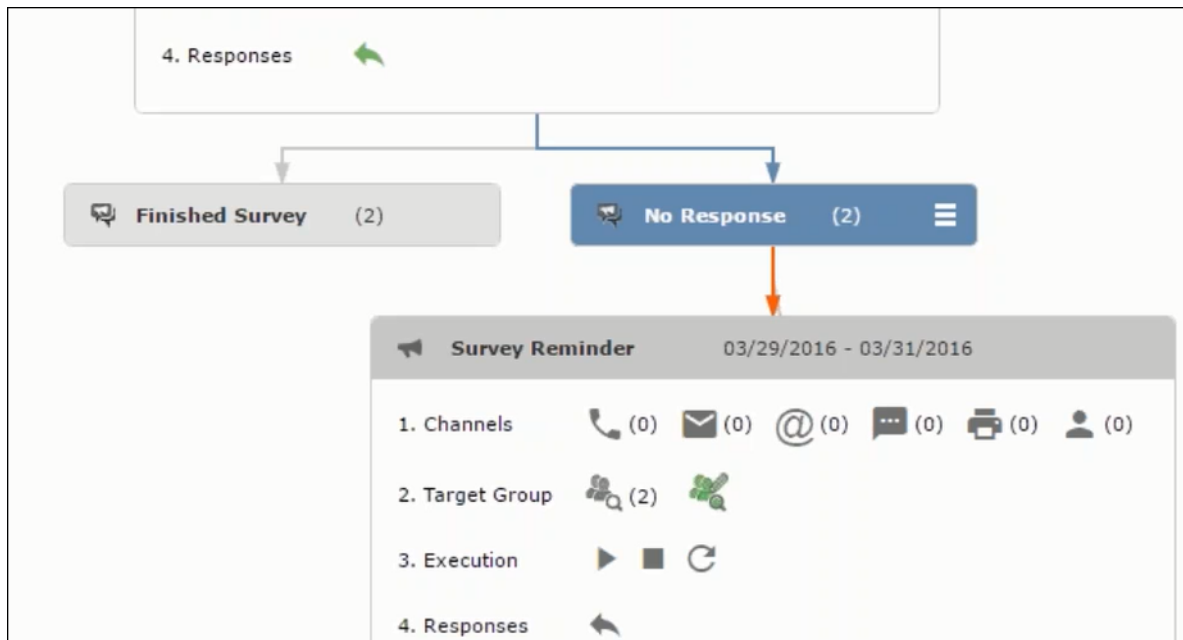
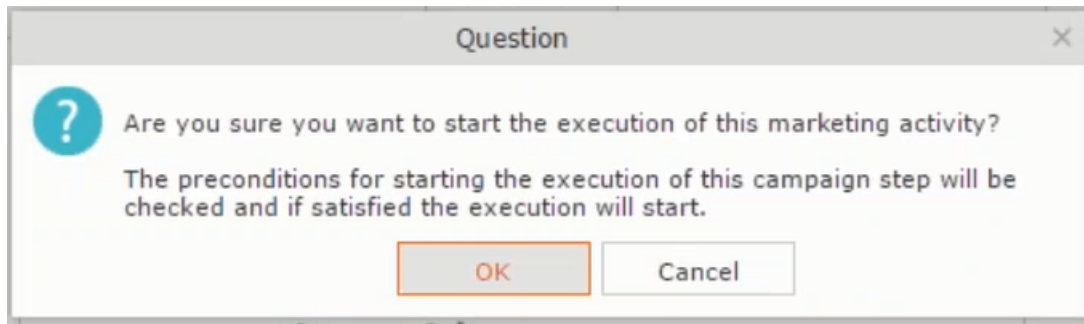
Edit the responses for all the participants.

- Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.



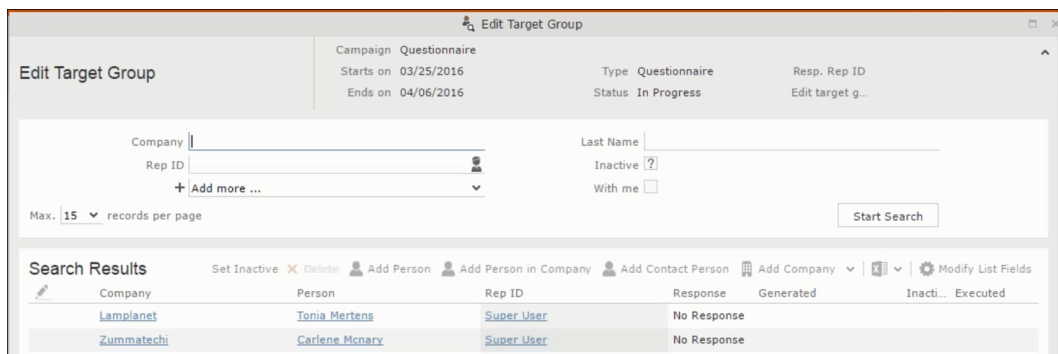
Notice the “(2)” in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

- Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.



You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

6. Click  to open the **Edit Target Group** window for the **Survey Reminder** follow-up marketing activity.



You can see that the two members with “No Response” in the **Response** column are listed.

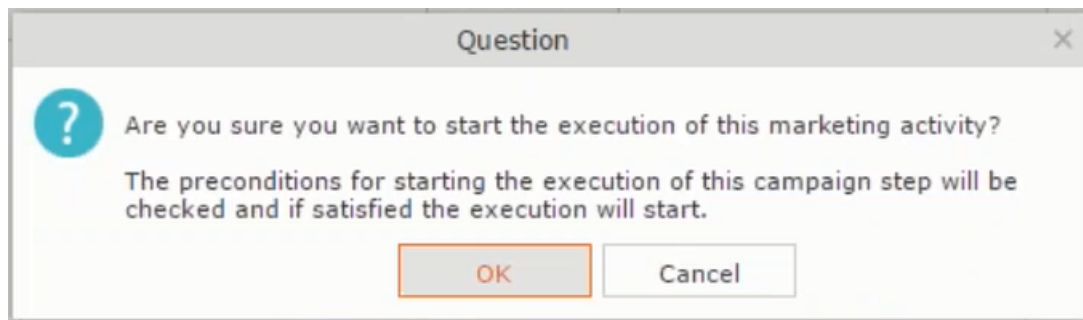
Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

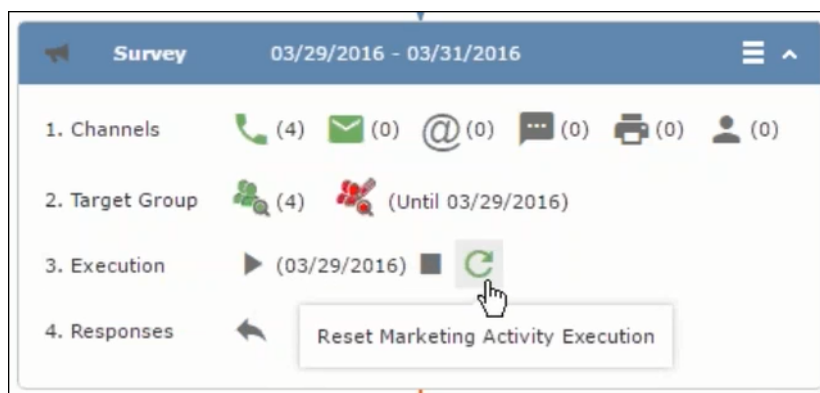
- All generated target group entities marked as “Generated” are deleted.
- The target group entities marked as “non Generated” are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:


1. Open the required campaign in the campaign designer.
2. On the marketing activity container, click to expand the container.

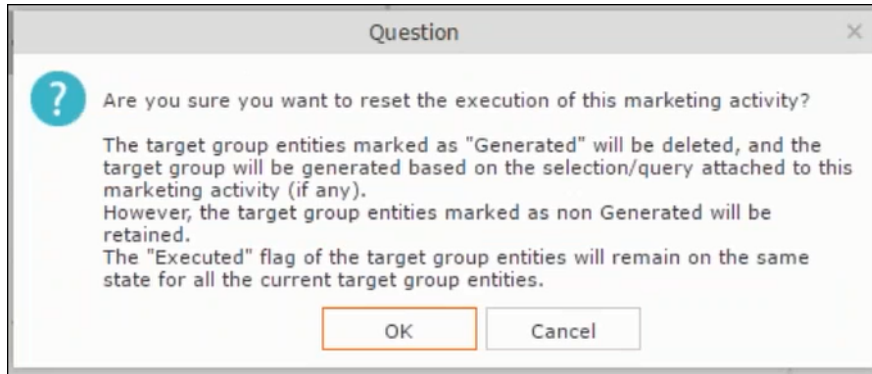


The following screenshot shows the **Survey** marketing activity container.

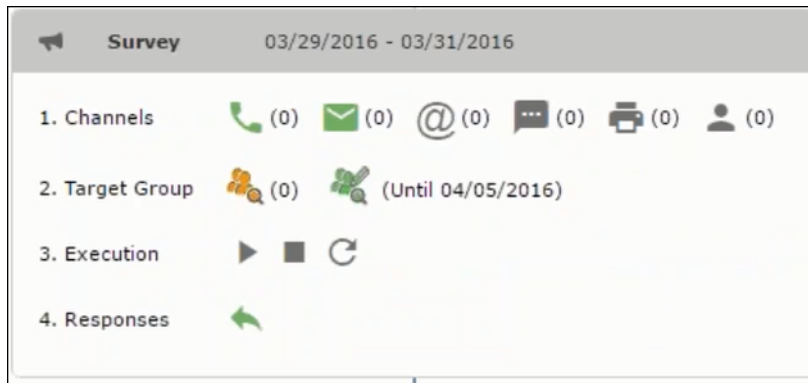


Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click  to reset the marketing activity execution. A confirmation window displays.



4. Click **OK**. The target group is reset and the target group is regenerated. The edit target group until date is reset.

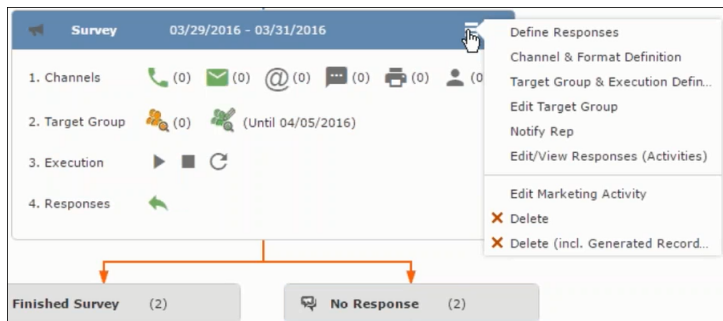


Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select **Notify Rep**.



2. The Notify about record opens.

Notify about record

You can send this record to any other rep and/or external recipient. Please specify what you want to send:

Recipients:

Additional internal recipients:

Additional external recipients:

Subject:
Survey (In Progress) | 03/29/2016

Body:

Insert Aurea CRM web link

Request a delivery receipt

Request a read receipt

Send Cancel

Enter the following information:

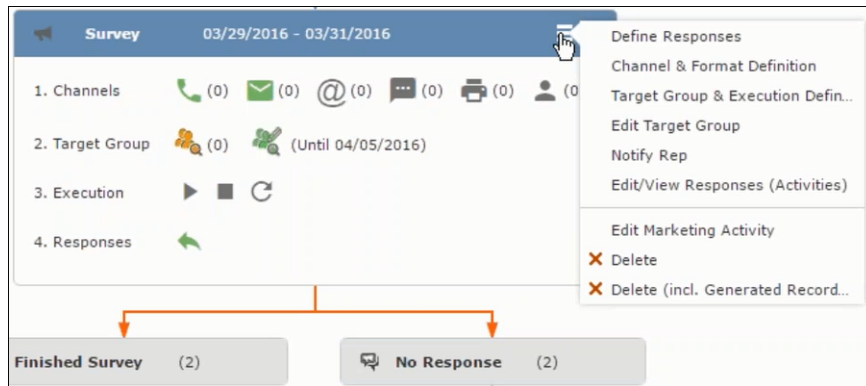
- **Recipients** – Add the internal and external recipients (reps) who receive the notification.
- **Subject** – Edit the subject of the notification email in this text field. You can also use the automatically generated subject.
- **Body** – Enter the notification content in the Body field.
- **Insert Aurea CRM web link** – Select this checkbox if you want to add the company URL in the notification.
- **Request a delivery receipt** – Select this checkbox if you want a receipt of delivery.
- **Request a read receipt** – Select this checkbox if you want to know if the notification was read by the recipient.

3. Click **Send** to send the notification to the selected reps.

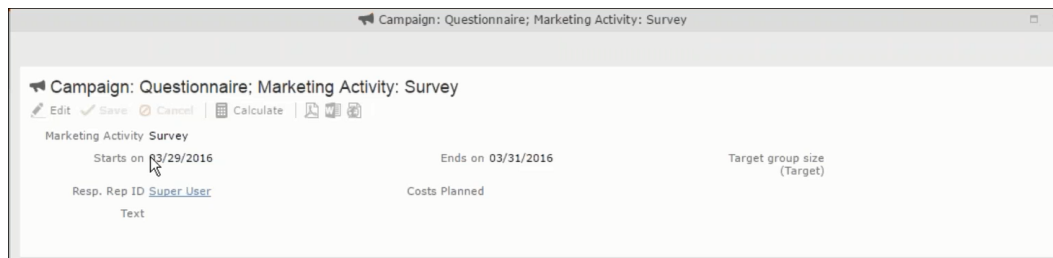
Editing a Marketing Activity

To edit a marketing activity, perform the following:

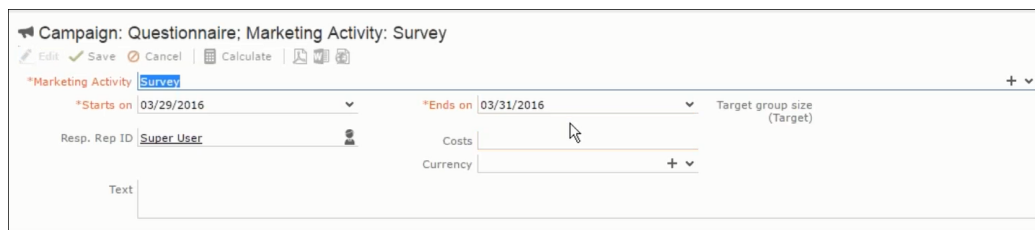
1. Open the required campaign in the campaign designer.
2. From the context menu of a marketing activity container, select **Edit Marketing Activity**.



3. The marketing activity window opens.



4. Click Edit to start editing the marketing activity.



5. Make the required changes and click **Save**.

Email Campaign Management

Email Campaign Management Using Aurea Campaign Manager (formerly called Lyris HQ)

As part of a campaign, the marketing activities can be carried out using multiple channels, like letters, fax, telephone, and email. Generally the email channel is the most preferred channel for marketing activities. While Aurea CRM provides its own email channel, it does not provide all the capabilities of a dedicated Email marketing solution. In order to provide a sophisticated email marketing channel Aurea CRM is integrated with Aurea Lyris HQ, a full-fledged Email marketing solution. Aurea CRM Enterprise edition users can use Lyris HQ to handle their email marketing activities and take full advantage of the sophisticated email marketing capabilities of Lyris HQ.

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](mailto: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 689.

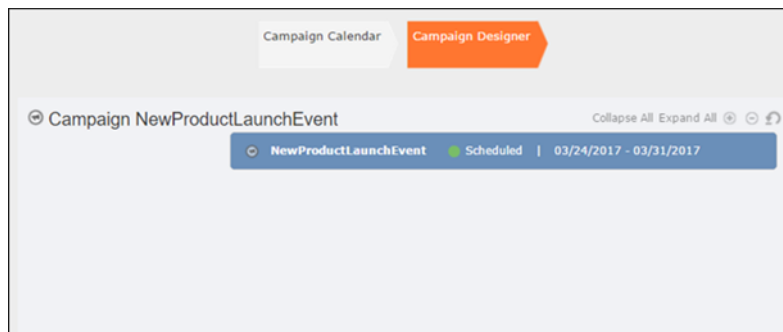
You can transfer a marketing activity to Lyris HQ from the campaign designer or from the standard editor for marketing activities.

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.

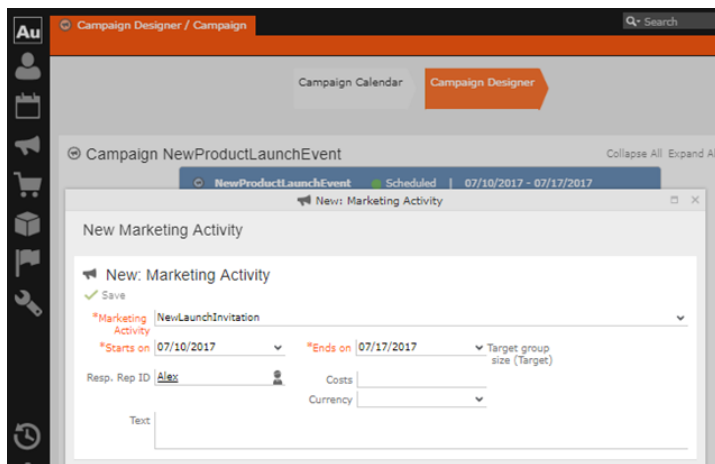
Transferring from the Campaign Designer

To transfer a marketing activity to Lyris HQ from the campaign designer, perform the following:

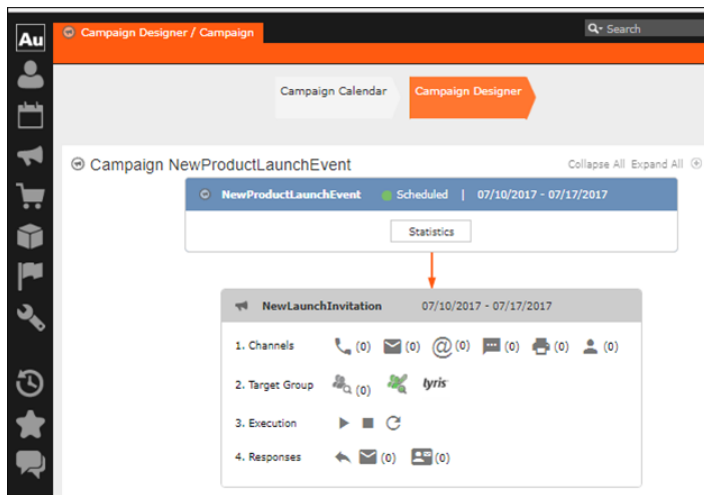
1. Open an existing campaign or create a new campaign. For more information, see [Viewing a campaign](#) on page 680 or [Creating a new campaign from scratch](#) on page 681. The following screenshot shows the example **NewProductLaunchEvent** campaign.



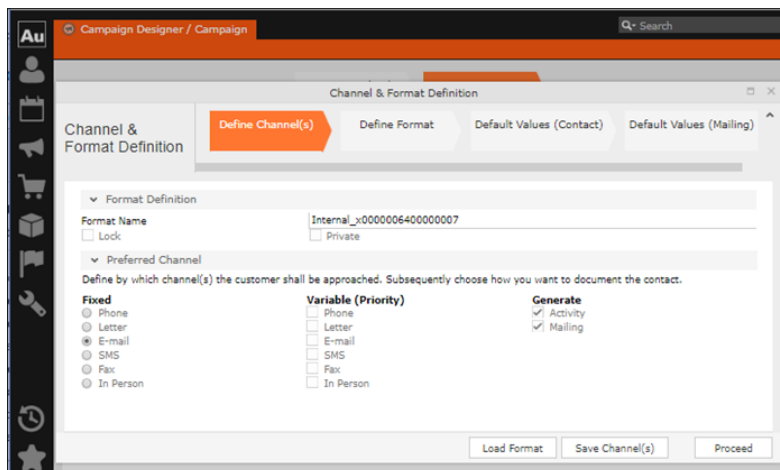
2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.



3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.
4. Click Save to create the new marketing activity container in the campaign designer.



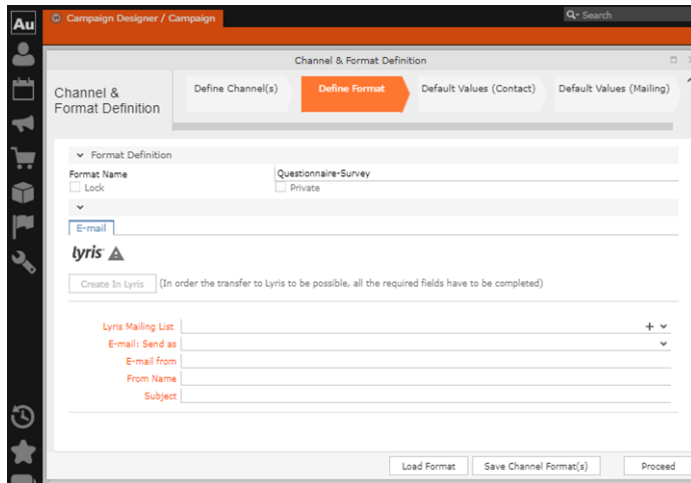
5. Click (email channel). The Channel & Format Definition page displays.



- a. Select the E-mail channel radio button under the Fixed column.
- b. Select the Activity and Mailing options under the Generate column. These are optional.

Note: If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

6. Click Save Channel(s).
7. Click Proceed, to go to the format definition phase. The Define Format page displays.



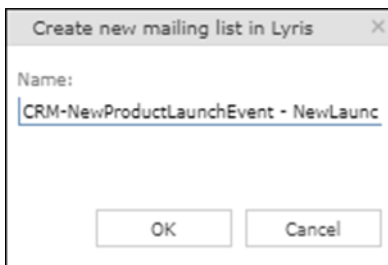
You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

Note: The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

- **Lyris Mailing List:** Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:

1. Click +. The Create new mailing list in Lyris dialog displays.

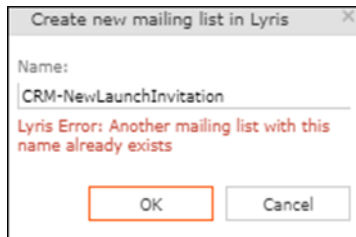


A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation).

In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation. You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

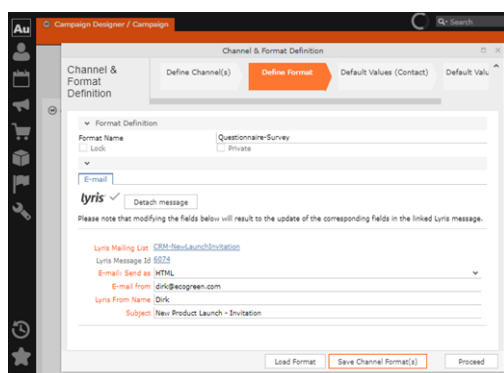


- **E-mail: Send as:** Select the desired format of the email you wish to send: HTML or Text
- **E-mail From:** Enter the email address of the marketing email sender.
- **From Name:** Enter the name of the sender.
- **Subject:** Enter the subject for the email.

Note: The above fields are used as properties of the email messages that are created in Lyris.

9. Click Save Channel Format(s). After the channel format is saved, the Create in Lyris button gets activated.
10. Click Create in Lyris.

A dummy message is created in Lyris for the marketing activity. Depending on your selection for the E-mail Send as field the dummy message is a text or HTML message. A tick appears besides the **lyris** icon on successful creation of the message. And a Detach message button displays. The ids for the mailing list and message created in Lyris are displayed along with the links to the instances in Lyris. See the screenshot below.



Click Detach Message to delete the message created in Lyris. Once the message is detached, all the attributes of the message are cleared, including the links in the Lyris Message ID and Lyris Mailing List fields. The corresponding message created in Lyris is also deleted. If the message is already sent then any responses received for the message are ignored by Lyris and Aurea CRM does not get any event corresponding to the message.

11. Click Save Channel Format(s).

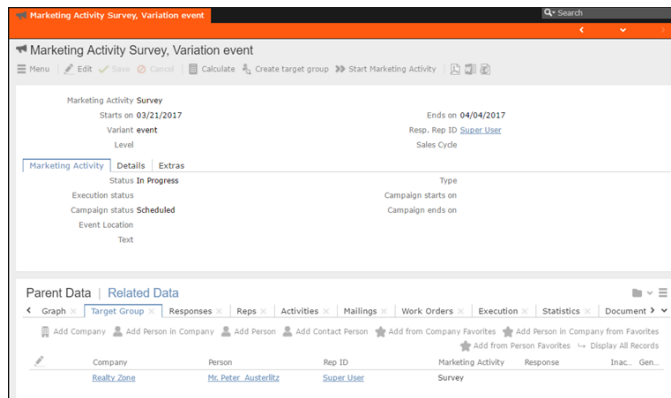
12. Click Proceed.

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
2. Enter the search filters and click Start Search. The search results list displays.
3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.



Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.
5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.

You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

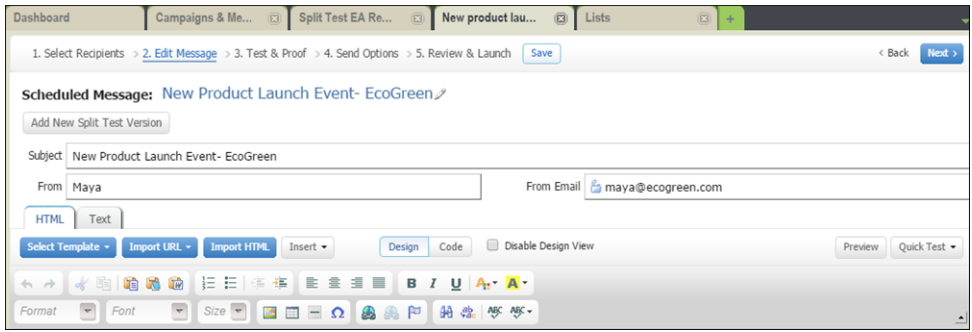
- The remaining steps are similar to those listed for transferring a marketing activity to Lyris from the campaign designer, see steps 8 to 10 in the topic [Transferring from the Campaign Designer](#) on page 748.

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.

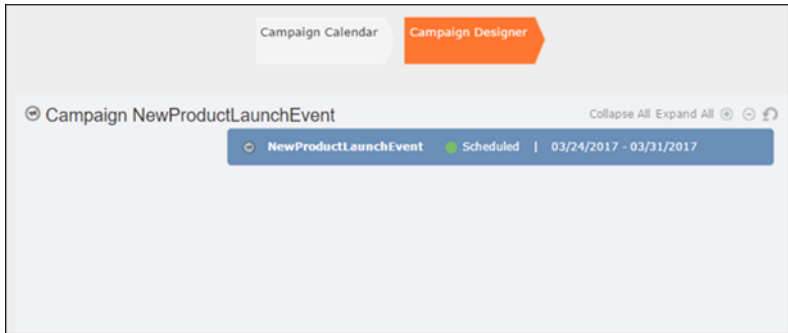


Note: Automatic transfer of changes to Lyris can take some time.

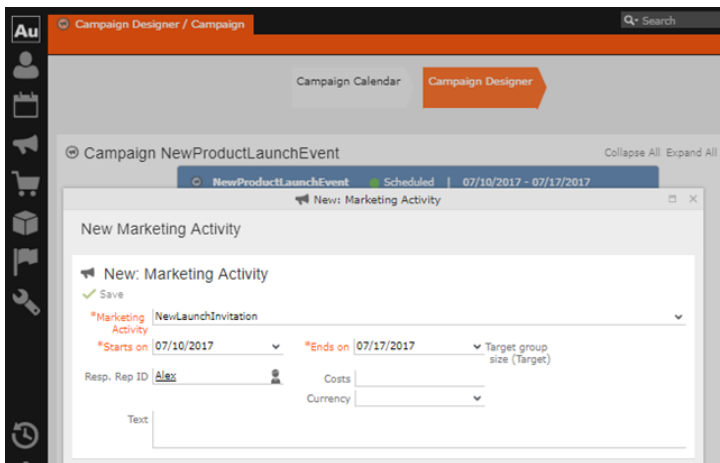
Transferring from the Campaign Designer

To transfer a marketing activity to Lyris HQ from the campaign designer, perform the following:

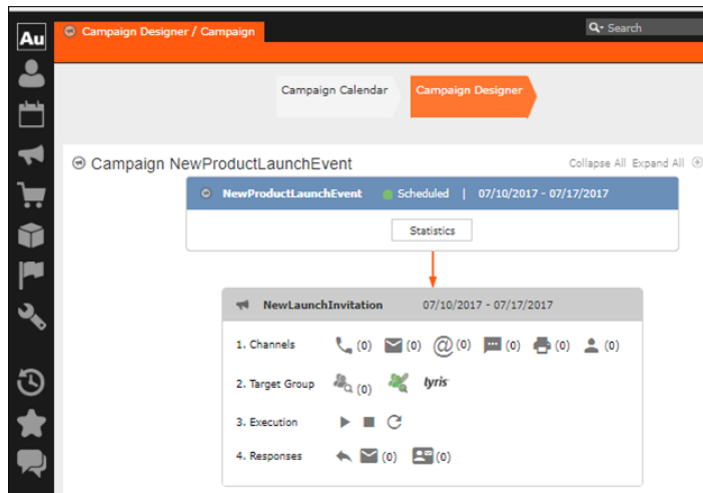
1. Open an existing campaign or create a new campaign. For more information, see [Viewing a campaign](#) on page 680 or [Creating a new campaign from scratch](#) on page 681. The following screenshot shows the example **NewProductLaunchEvent** campaign.



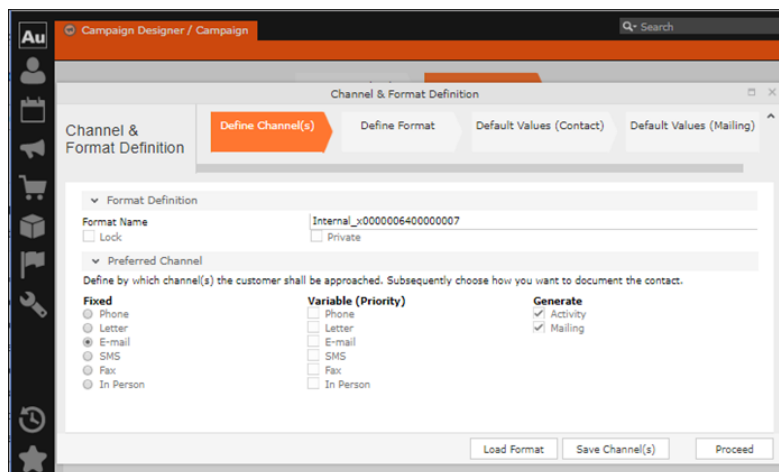
2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.



3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.
4. Click Save to create the new marketing activity container in the campaign designer.



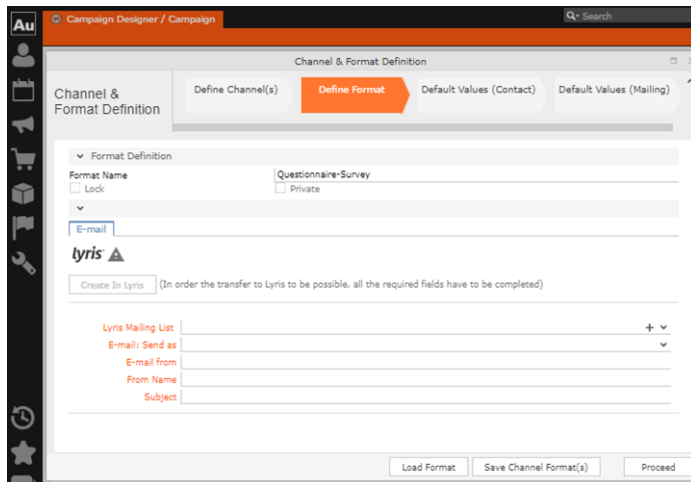
5. Click (email channel). The Channel & Format Definition page displays.



- a. Select the E-mail channel radio button under the Fixed column.
- b. Select the Activity and Mailing options under the Generate column. These are optional.

Note: If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

6. Click Save Channel(s).
7. Click Proceed, to go to the format definition phase. The Define Format page displays.



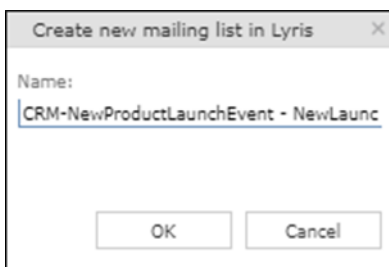
You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

Note: The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

- Lyris Mailing List: Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:

1. Click +. The Create new mailing list in Lyris dialog displays.



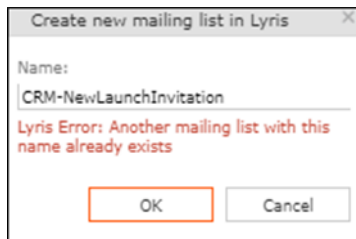
A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation).

In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation.

You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

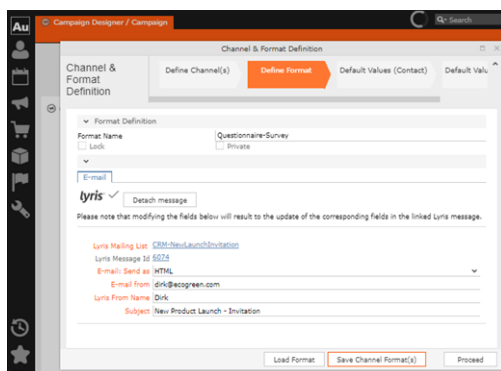


- **E-mail: Send as:** Select the desired format of the email you wish to send: HTML or Text
- **E-mail From:** Enter the email address of the marketing email sender.
- **From Name:** Enter the name of the sender.
- **Subject:** Enter the subject for the email.

Note: The above fields are used as properties of the email messages that are created in Lyris.

9. Click Save Channel Format(s). After the channel format is saved, the Create in Lyris button gets activated.
10. Click Create in Lyris.

A dummy message is created in Lyris for the marketing activity. Depending on your selection for the E-mail Send as field the dummy message is a text or HTML message. A tick appears besides the **lyris** icon on successful creation of the message. And a Detach message button displays. The ids for the mailing list and message created in Lyris are displayed along with the links to the instances in Lyris. See the screenshot below.



Click Detach Message to delete the message created in Lyris. Once the message is detached, all the attributes of the message are cleared, including the links in the Lyris Message ID and Lyris Mailing List fields. The corresponding message created in Lyris is also deleted. If the message is already sent then any responses received for the message are ignored by Lyris and Aurea CRM does not get any event corresponding to the message.

11. Click Save Channel Format(s).

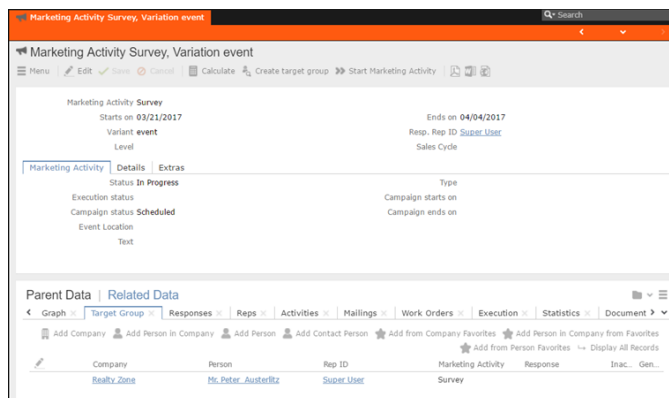
12. Click Proceed.

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
2. Enter the search filters and click Start Search. The search results list displays.
3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.



Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.
5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.

You should see the Lyriss Email channel definition page. If Lyriss is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyriss email marketing channel.

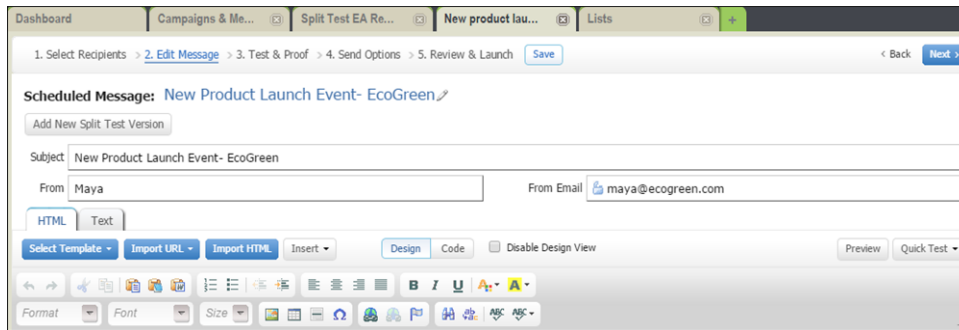
- The remaining steps are similar to those listed for transferring a marketing activity to Lyriss from the campaign designer, see steps 8 to 10 in the topic [Transferring from the Campaign Designer](#) on page 748.

Making changes to the marketing activity transferred to Lyriss

When you modify and save the message details of a marketing activity that is already transferred to Lyriss, the changes are automatically transferred to the corresponding Lyriss instance of the marketing activity's message.

For example, in the screenshots below, the E-mail from, Lyriss From Name and Subject field values are changed and the channel format is saved. The screenshots of Lyriss 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 Lyriss message.



Note: Automatic transfer of changes to Lyris can take some time.

Transferring a CRM Target group to Lyris HQ

Learn to transfer a CRM target group to Lyris HQ.

Once you have transferred the marketing activity to Lyris, you have to create the target group and execution definition for the marketing activity, for more information see [Adding the Target Group and Execution Definition](#) on page 722. 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.

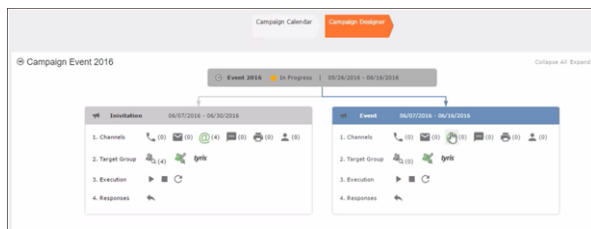
4. **Overview**—this phase displays the number of active target group entities that are eligible to be transferred to Lyris.
5. **Schedule Transfer**—this phase schedules the transfer and ensures that the transfer process remains active until all the entities are transferred to Lyris. For example, if 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

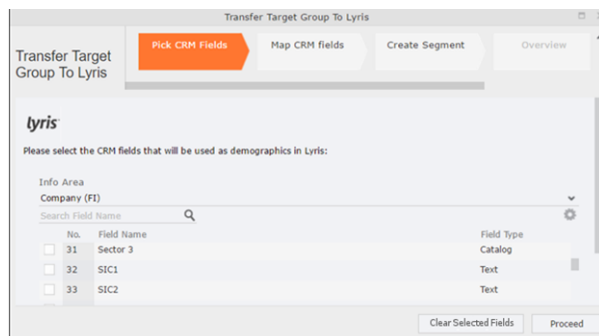
Transferring from the Campaign designer

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:

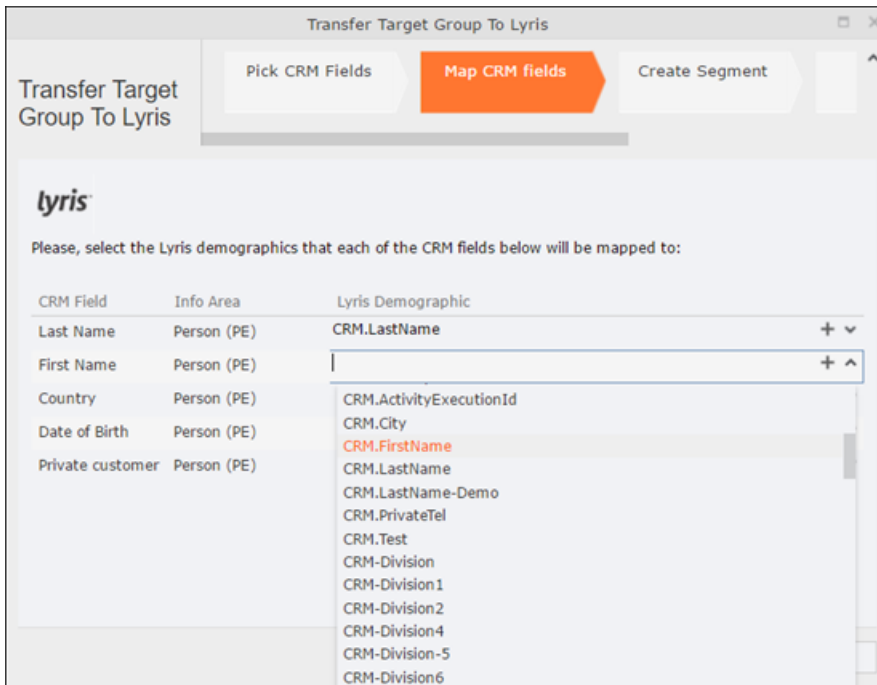
- The SeqNo, and StatNo fields.
- The fields for which the user does not have view rights.
- The fields containing email addresses. They are automatically transferred.

4. Click Proceed. The Map CRM fields tab gets activated and the following message displays: *Please wait until the mappings between CRM fields and Lyriss demographic mappings are loaded...*

Aurea CRM communicates with Lyriss server to retrieve the corresponding Lyriss demographics and displays the mapping table.

To map the CRM fields listed in the table with the retrieved Lyriss demographics, perform the following:

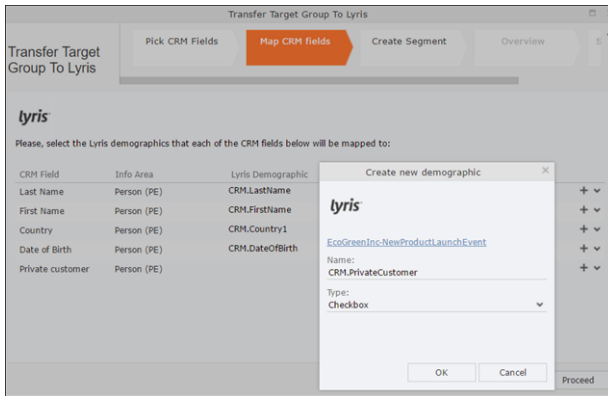
- a. Click in the Lyriss Demographics column to display the list of demographics retrieved from the Lyriss server and select the appropriate demographic for each of the listed CRM field. The demographics listed available are the ones that are compatible with the CRM field based on the CRM Field type. See the screenshot below:



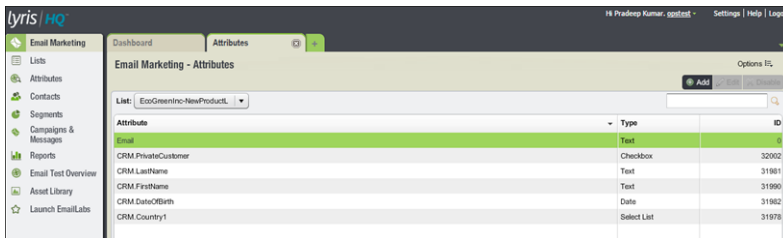
If you cannot find an appropriate Lyriss demographic for the CRM field, you can create a new Lyriss demographic. See the next step.

- b. To create a new demographic, perform the following:
 - a. Click +. The Create new demographic dialog displays.
 - b. Enter a name for the demographic. A suggested name (name of the corresponding CRM field) is displayed for the demographic to be created in the **Name** textbox. You can also specify a name according to your preference.
 - c. Select the type of the demographic from the Type field.

In the screenshot below a new demographic for the field private customer is created. It is named CRM.PrivateCustomer and the type selected is a Checkbox.

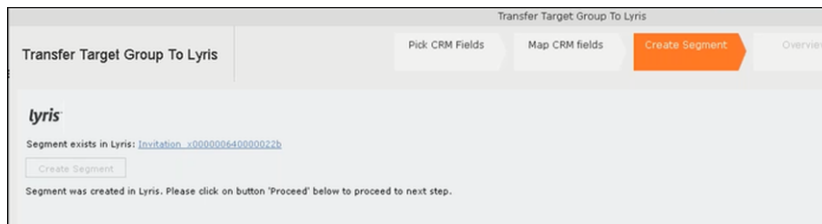


- d. Click OK. The new demographic is created in Lyris.
- e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.



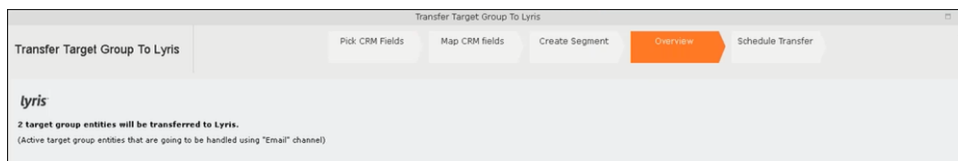
- 5. Click Proceed. The Create Segment tab displays.
- 6. Click Create Segment. A segment for this mailing list is created in Lyris.

The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.



When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

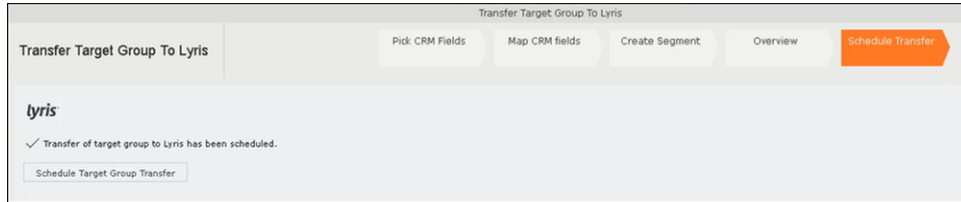
- 7. Click Proceed. The Overview tab displays.



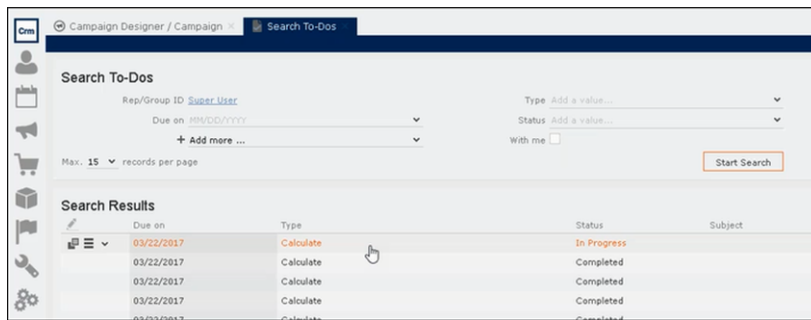
The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

Note: If there are no target group entities for the email channel available to be transferred to Lyriss, then a message “*No target group entities are eligible to be transferred to Lyriss*” is displayed. You should go back and create the target group.

8. Click Proceed. The Schedule Transfer tab displays.
9. Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

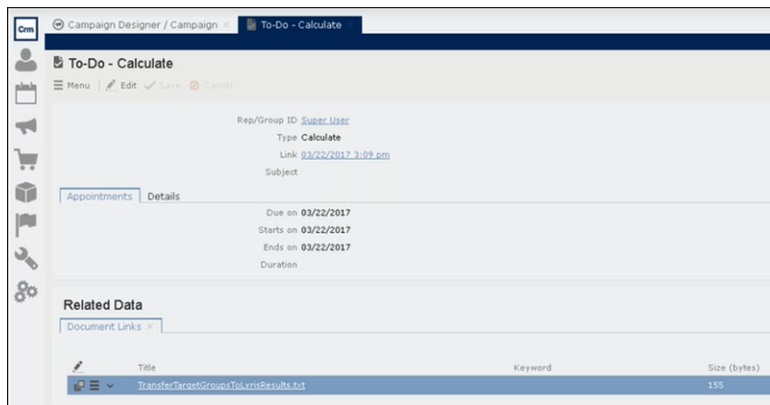


10. To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.



The transfer status changes to Completed, once the target group is transferred successfully.

11. To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.



Open the document to find the information on the transfer process.

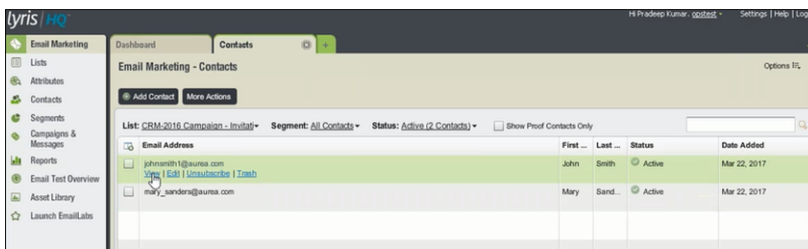
```

TransferTargetGroupsToLyrismResults (16).txt - Notepad
File Edit Format View Help
2017.03.22 16:09:40 | Result: Success
2017.03.22 16:09:40 | Successfully transferred in chunk: 2
2017.03.22 16:09:40 | Not transferred in chunk: 0
2017.03.22 16:09:40 | Target groups in chunk: 2
2017.03.22 16:09:40 | Chunk size: 10
2017.03.22 16:09:40 | Target groups left to transfer: 2
2017.03.22 16:09:40 | ErrorMessage:
2017.03.22 16:09:40 | Errors count: 0

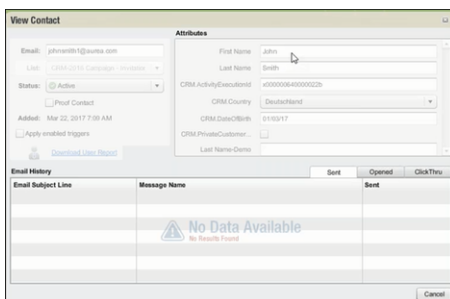
```

12. You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:

- a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.



- b. Click View to open the details of the contact generated. The View Contacts dialog displays.



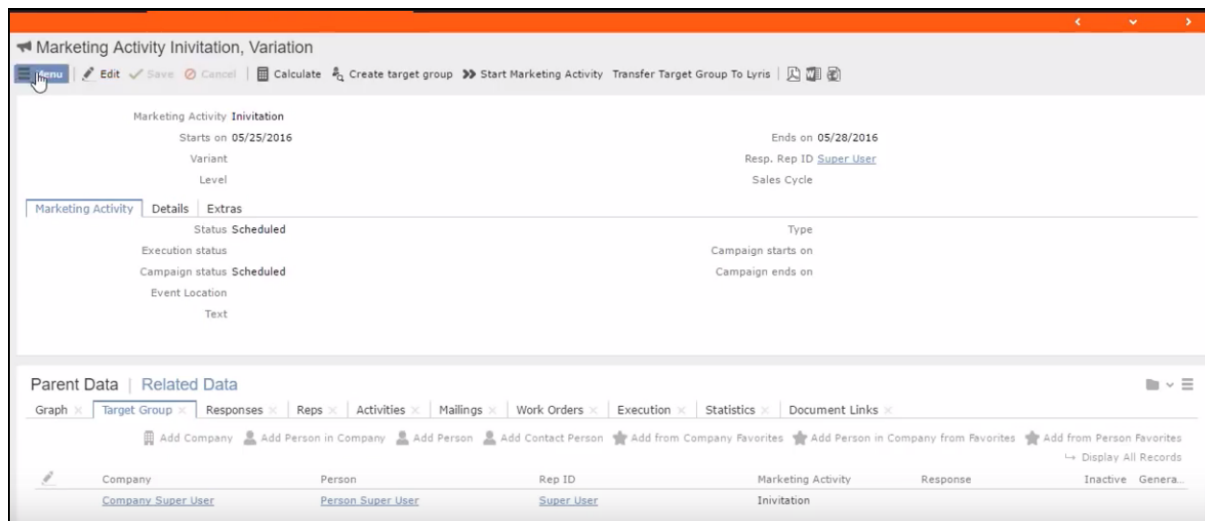
The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyris

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

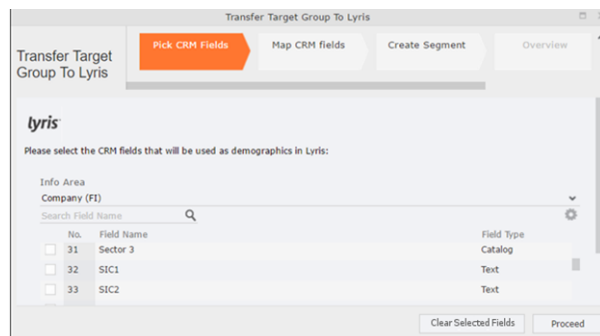
To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
2. Enter the search filters and click **Start Search**. The search results list displays.
3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.



Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select **Related Data > Target Group** tab.
5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.
6. Once your target group is defined, click the Transfer Target Group to Lyris link. The Transfer Target Group to Lyris page displays.



7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic [Transferring from the Campaign designer](#) on page 763.

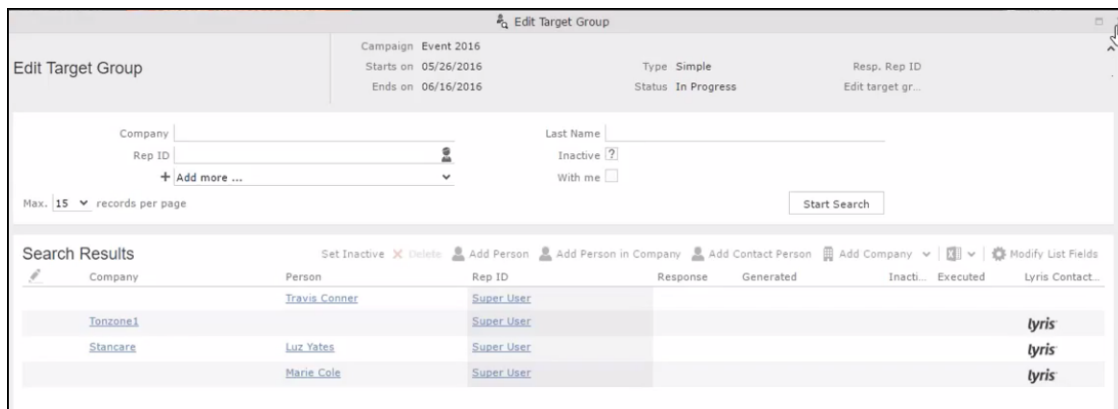
The remaining sections in this chapter talk about the effect of making changes to the target group in Aurea CRM and the corresponding changes in Lyris.

Adding or Deleting member(s) from a Target group

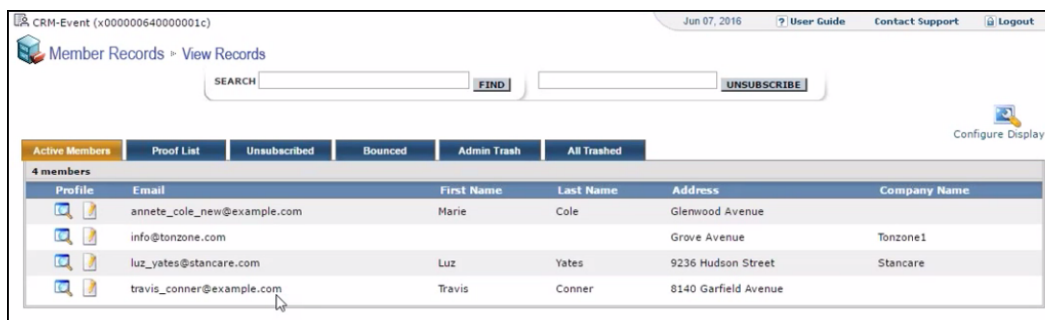
When you add a member to or delete a member from a target group that is already transferred to Lyris, a corresponding member entity is added or deleted from the corresponding mailing list on Lyris.

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.



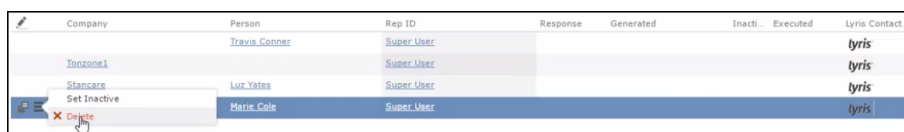
As visible in the screenshot above, a new member (Travis Conners) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.



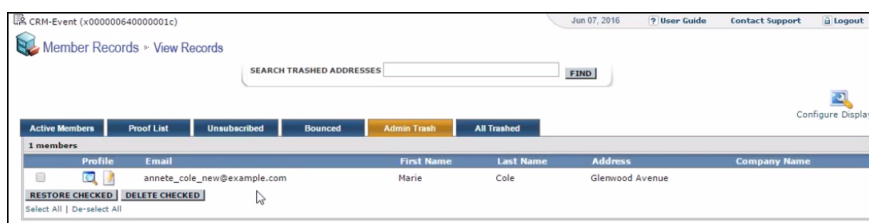
As you can see the new person is added to the list of active participants in the corresponding mailing list.

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.



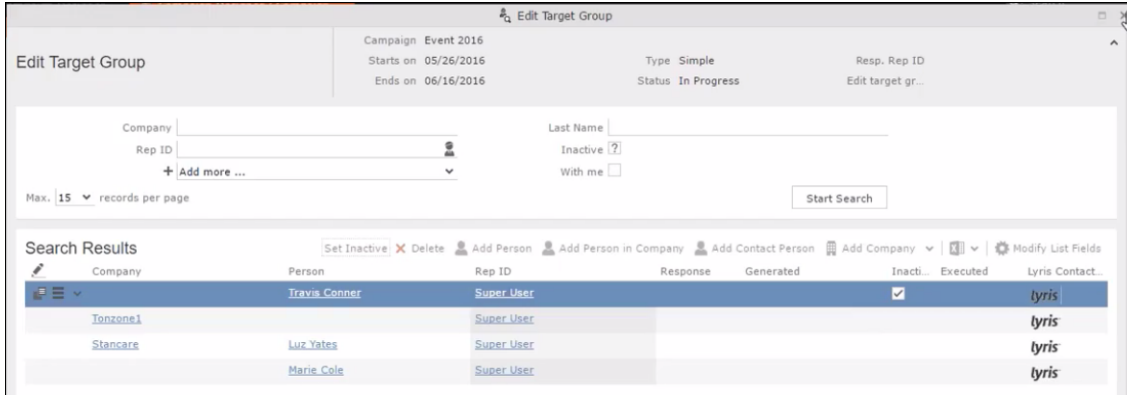
Member **Marie Cole** is deleted from the target group.



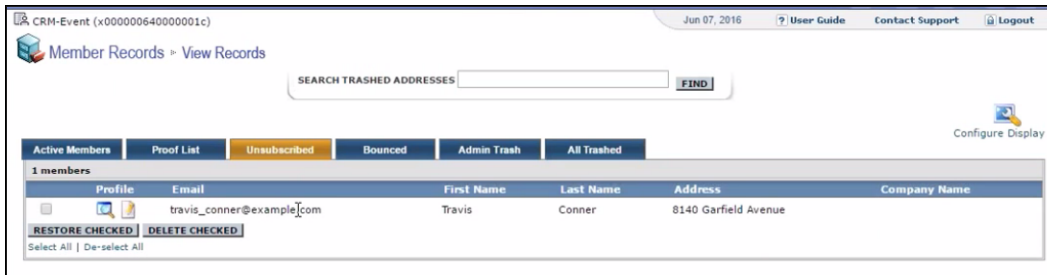
Member Marie Cole is moved from **Active Members** list to **Admin Trash** list.

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 Lyriss. 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 Lyriss.

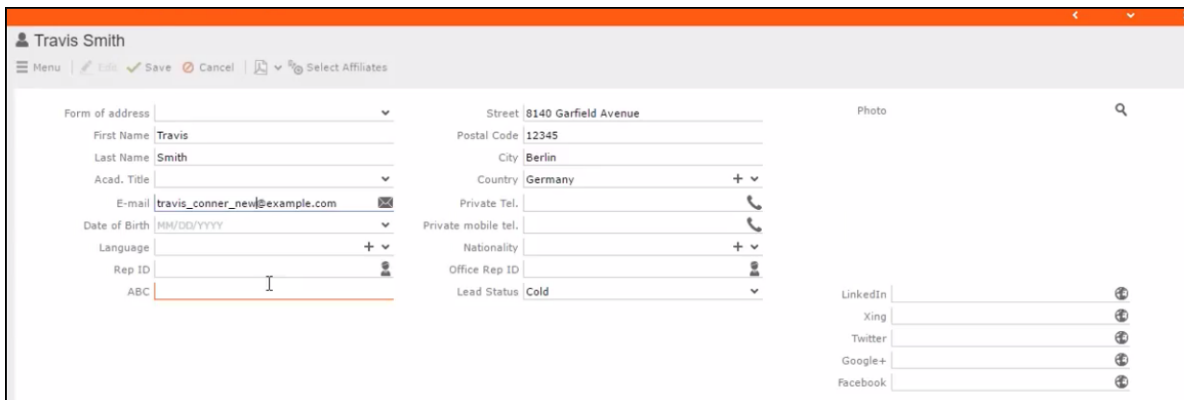


Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyriss from the **Unsubscribed** list to the **Active Members** list.

Changing the attributes of a target group entity

If the attribute of a target group member already transferred to Lyriss is changed, the changes are automatically transferred to Lyriss.

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 Lyriss.



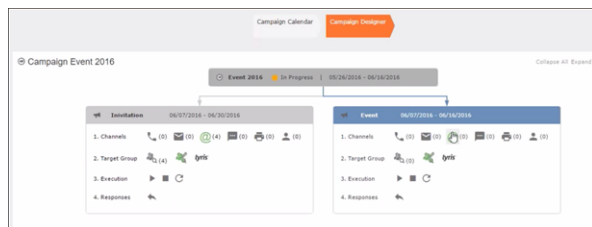
The corresponding changes to the member record in Lyris is shown in the screenshot below.

Profile	Email	First Name	Last Name	Address	Company Name
	info@tonzone.com			Grove Avenue	Tonzone1
	luz_yates@stancare.com	Luz	Yates	9236 Hudson Street	Stancare
	travis_smith@example.com	Travis	Smith	8140 Garfield Avenue	Example

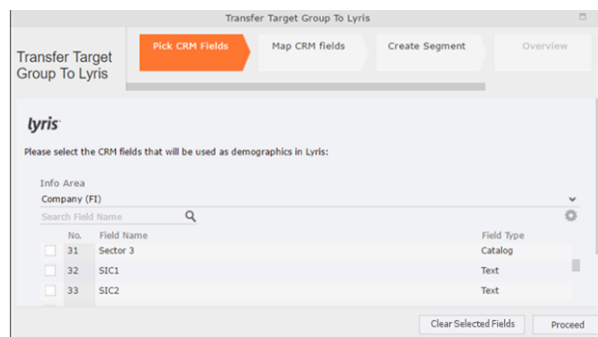
Transferring from the Campaign designer

To transfer a target group for a marketing activity to CRM designer:

1. Open the marketing activity in the campaign designer.



2. Click in the Target Group row. The Transfer Target Group to Lyris page displays.



3. Click the Pick CRM Fields tab. To select the required CRM fields to be included as attributes for the contacts in the target group, perform the following:
 - a. Select the required Infoarea from the Info Area dropdown list.
 - b. Click the check box to select the required field from each infoarea. You can search for specific fields by typing the field name in the Search Field Name filter. You can sort the displayed fields by name or type by clicking the respective field headers: Field Name or Field Type.
 - c. Repeat the above steps to select the required fields from different infoareas.

The following fields from the infoareas are not displayed:

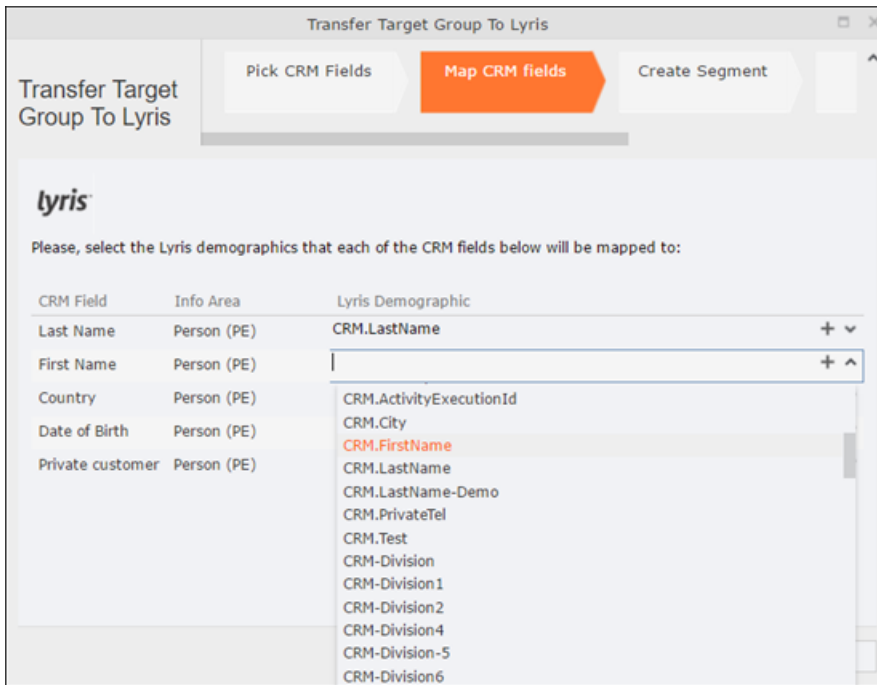
- The SeqNo, and StatNo fields.
- The fields for which the user does not have view rights.
- The fields containing email addresses. They are automatically transferred.

4. Click Proceed. The Map CRM fields tab gets activated and the following message displays: *Please wait until the mappings between CRM fields and Lyris demographic mappings are loaded...*

Aurea CRM communicates with Lyris server to retrieve the corresponding Lyris demographics and displays the mapping table.

To map the CRM fields listed in the table with the retrieved Lyris demographics, perform the following:

- Click in the Lyris Demographics column to display the list of demographics retrieved from the Lyris server and select the appropriate demographic for each of the listed CRM field. The demographics listed available are the ones that are compatible with the CRM field based on the CRM Field type. See the screenshot below:

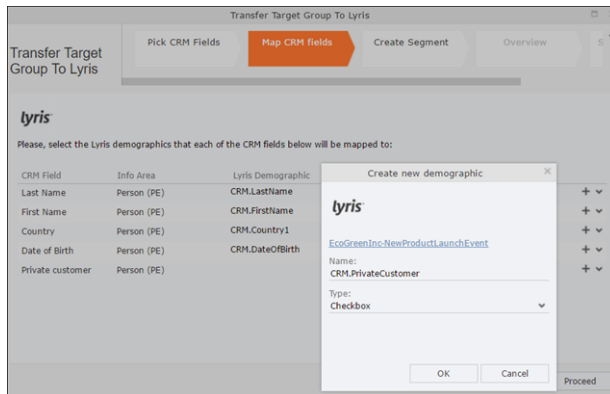


If you cannot find an appropriate Lyris demographic for the CRM field, you can create a new Lyris demographic. See the next step.

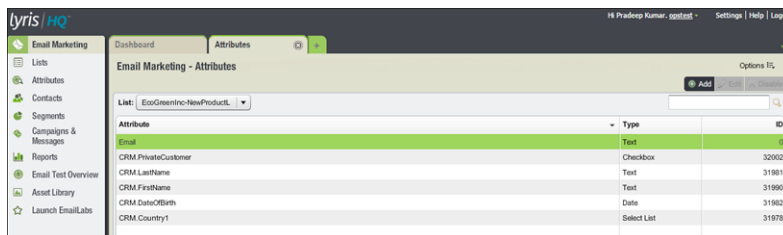
- To create a new demographic, perform the following:
 - Click +. The Create new demographic dialog displays.
 - Enter a name for the demographic. A suggested name (name of the corresponding CRM field) is displayed for the demographic to be created in the **Name** textbox. You can also specify a name according to your preference.

- c. Select the type of the demographic from the Type field.

In the screenshot below a new demographic for the field private customer is created. It is named CRM.PrivateCustomer and the type selected is a Checkbox.

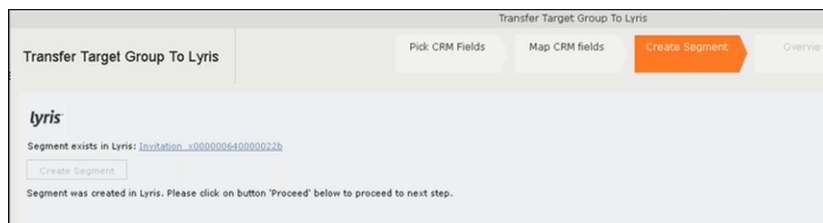


- d. Click OK. The new demographic is created in Lyris.
- e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.



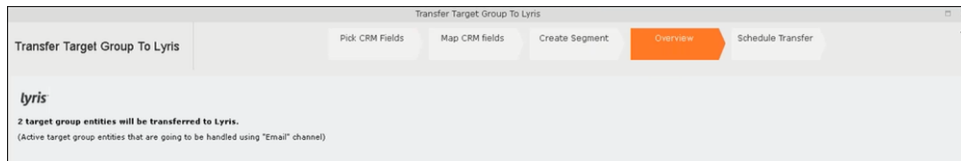
5. Click Proceed. The Create Segment tab displays.
6. Click Create Segment. A segment for this mailing list is created in Lyris.

The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.



When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

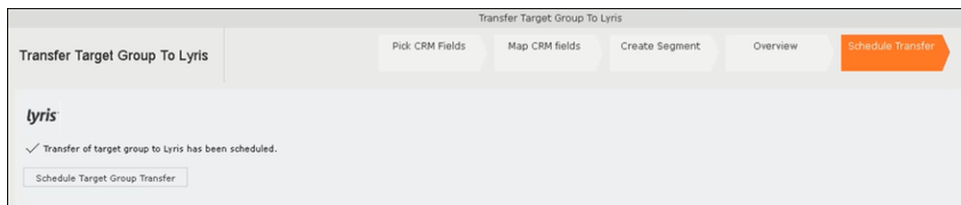
7. Click Proceed. The Overview tab displays.



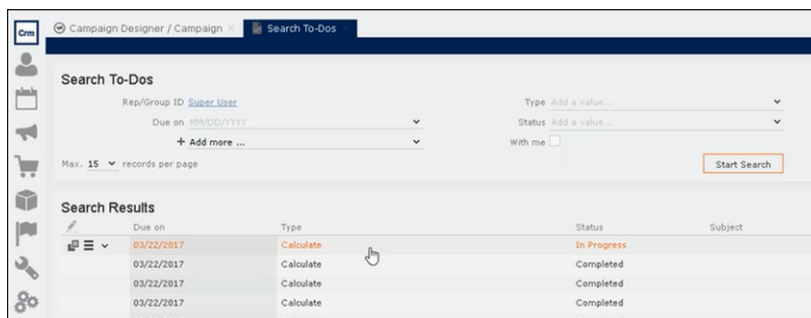
The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

Note: If there are no target group entities for the email channel available to be transferred to Lyris, then a message “No target group entities are eligible to be transferred to Lyris” is displayed. You should go back and create the target group.

8. Click Proceed. The Schedule Transfer tab displays.
9. Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

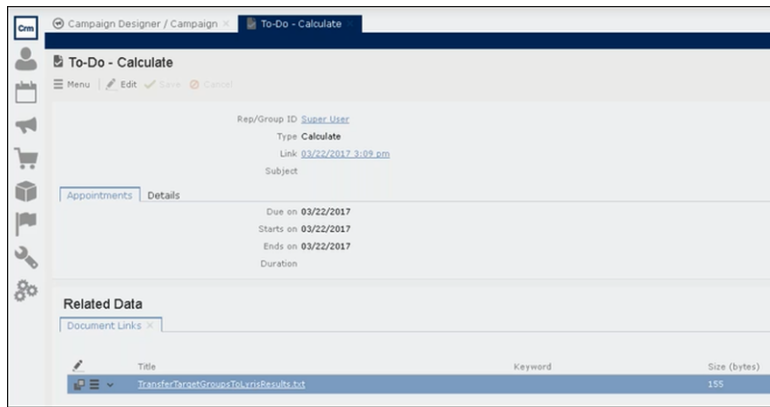


10. To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.

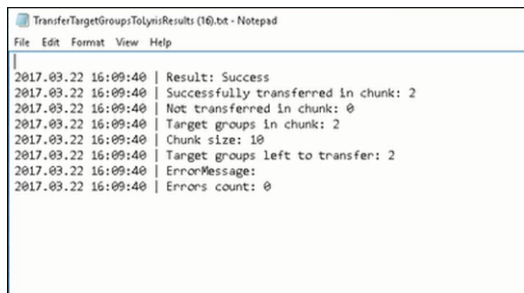


The transfer status changes to Completed, once the target group is transferred successfully.

11. To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.

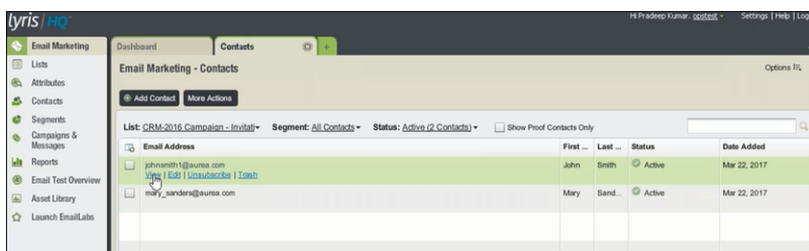


Open the document to find the information on the transfer process.

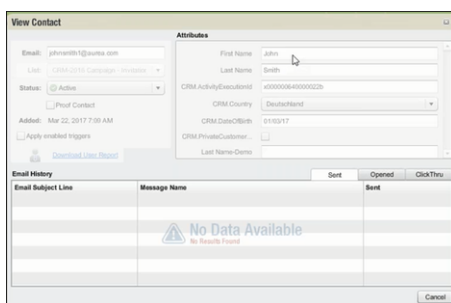


12. You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:

- a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.



- b. Click View to open the details of the contact generated. The View Contacts dialog displays.



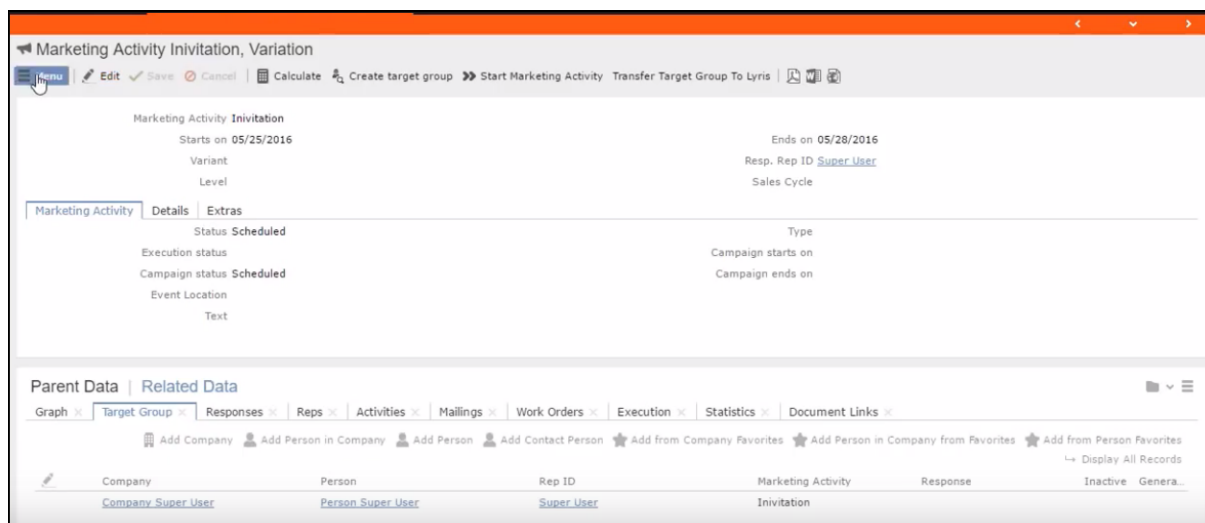
The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyrus

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyrus from the standard editor.

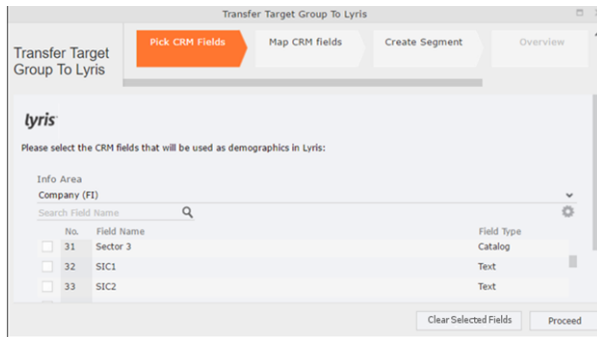
To transfer a marketing activity from the standard editor to Lyrus, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
2. Enter the search filters and click **Start Search**. The search results list displays.
3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.



Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select **Related Data > Target Group** tab.
5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.
6. Once your target group is defined, click the Transfer Target Group to Lyrus link. The Transfer Target Group to Lyrus page displays.



7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic [Transferring from the Campaign designer](#) on page 763.

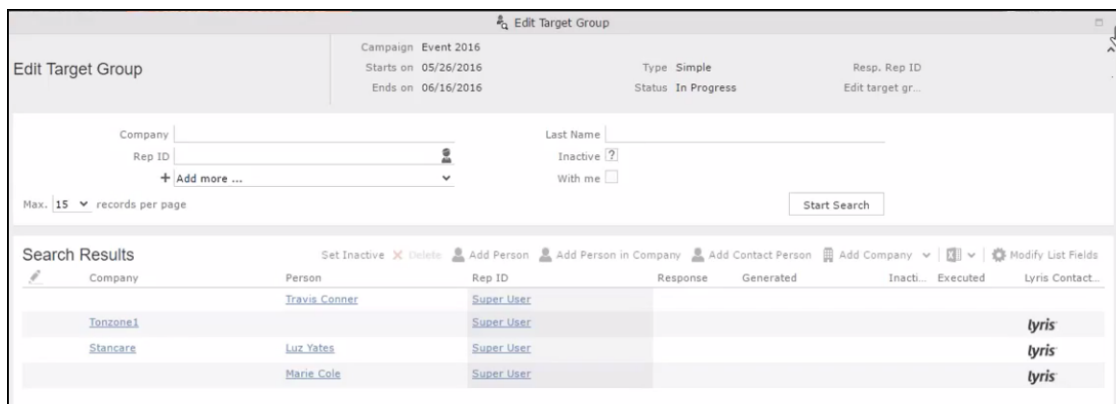
The remaining sections in this chapter talk about the effect of making changes to the target group in Aurea CRM and the corresponding changes in Lyris.

Adding or Deleting member(s) from a Target group

When you add a member to or delete a member from a target group that is already transferred to Lyris, a corresponding member entity is added or deleted from the corresponding mailing list on Lyris.

Adding a member to the target group

In the screenshots below, a fourth member is added to the target group and the corresponding change in Lyris is shown.



As visible in the screenshot above, a new member (Travis Connors) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.



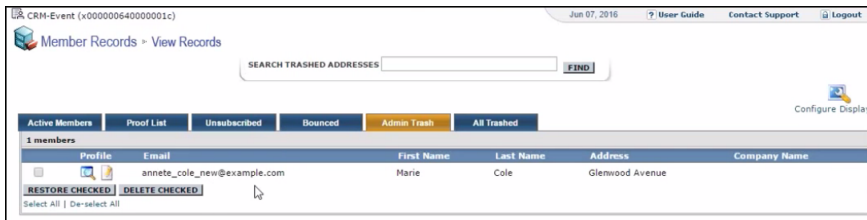
As you can see the new person is added to the list of active participants in the corresponding mailing list.

Deleting a member from the target group

If you delete a member from the target group on Aurea CRM, the corresponding mailing list member in Lyris is moved from **Active members** to the **Admin Trash** list.



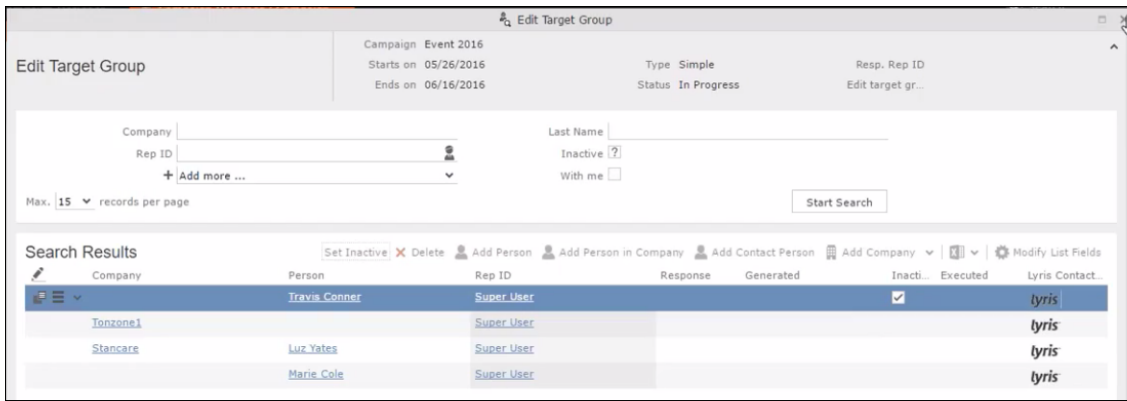
Member **Marie Cole** is deleted from the target group.



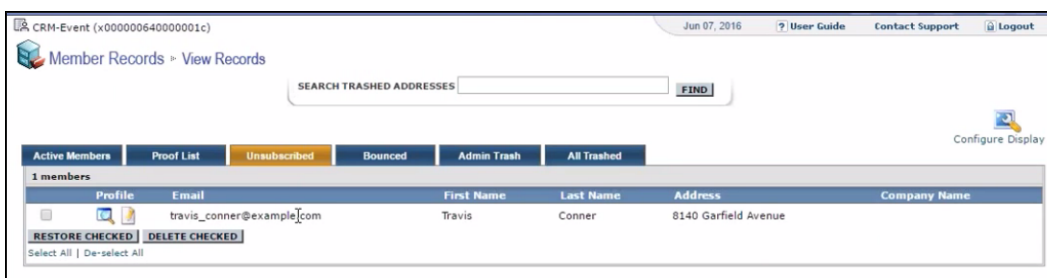
Member Marie Cole is moved from **Active Members** list to **Admin Trash** list.

Activating or deactivating a target group entity

Deactivating a target group member in Aurea CRM, moves the corresponding member record to the unsubscribed list in Lyris. The following screenshot shows the person entity (Travis Connors) deactivated (**Inactive**) in **Edit Target Group** window.



The corresponding entity is now moved to the unsubscribed list of member records in Lyris.

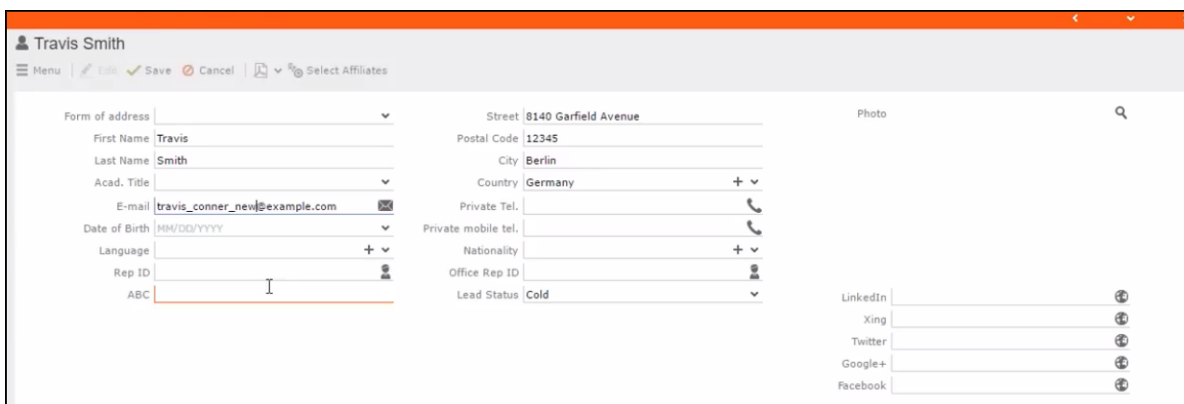


Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyris from the **Unsubscribed** list to the **Active Members** list.

Changing the attributes of a target group entity

If the attribute of a target group member already transferred to Lyris is changed, the changes are automatically transferred to Lyris.

In the following screenshots the last name of person entity Conner is changed to Smith, and his email id is changed to the same is reflected in Lyris.



The corresponding changes to the member record in Lyris is shown in the screenshot below.

CRM-Event (x000000640000001c) Jun 07, 2016 User Guide Contact Support Logout

Member Records > View Records

SEARCH FIND UNSUBSCRIBE

Configure Display

Active Members Proof List Unsubscribed Bounced Admin Trash All Trashed

3 members

Profile	Email	First Name	Last Name	Address	Company Name
	info@tonzone.com			Grove Avenue	Tonzone1
	luz_yates@stancare.com	Luz	Yates	9236 Hudson Street	Stancare
	tsvis_conner_new@example.com	Travis	Smith	8140 Garfield Avenue	

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Events

Events

Learn about event planning, management and monitoring in Aurea CRM.

Aurea CRM allows you to depict the thematic and organizational structure of events by adding events as campaigns and executing the following steps:

- **Planning:** Estimate the number of participants, select a venue and speakers, and create an agenda.
- **Approval:** The responsible persons verify and approve the event (its budget and/or compliance-relevant aspects).
- **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.
- **Follow-up:** You can evaluate the event and calculate the costs.

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. Functions specific to events are described in the following sections.

Planning Events

Learn to add, manage and monitor details of events.

To plan an event:

1. Add a new campaign.
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.
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. 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 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.
6. Enter information on any required equipment in the **Equipment** info area.
7. Add the agenda.
8. Select speakers and lecture topics.
9. Create a query that returns the persons and companies that should attend the event. 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.
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.

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.

New: Equipment

✓ Save

Equipment **Beamer** + ▾

Description

Costs _____ Currency _____ +

Quantity **1** Equipment Unit _____ +

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 **(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.

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.
2. The event needs to be approved or verified by the responsible rep.
 - 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 receive a message when the campaign has been approved or verified.

Approving/Verifying Events

If you are responsible for approving or verifying events, you are informed using a To-Do record whenever a campaign has been submitted.

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.
3. You can determine which lectures participants attend.
4. Upon receiving responses, e.g. to invitations, enter the responses.
5. Once the event has been held, you need to enter whether participants actually attended the event.

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 cancellations etc. on the **Registration** tab
- Enter information on the participant's accommodation on the **Hotel** tab, e.g. name of the hotel, type of room, 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.

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 (>> on page 283), 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 cancellation date entered. The target group record added for the original follow-up activity is deleted, and a new target group record is added for the new follow-up activity.

Note: Attention: When entering responses, ensure that you only select a single answer. Multiple responses can lead to undesired results.

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.

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  (**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: Note: You can add agenda items to campaigns for events consisting of only a single track.

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

Learn how to approve or reject 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.
2. The event needs to be approved or verified by the responsible rep.
 - 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: 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: 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 receive a message when the campaign has been approved or verified.

Approving/Verifying Events

If you are responsible for approving or verifying events, you are informed using a To-Do record whenever a campaign has been submitted.

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.

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: Note: The campaign's start date must be in the future, otherwise the **Budget approval required** and **Verification Required** check boxes cannot be enabled. If the start date is not in the future at the time of submission, these check boxes are disabled automatically by the system (without notification).

5. Save the record.

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You receive a message when the campaign has been approved or verified.

Approving/Verifying Events

If you are responsible for approving or verifying events, you are informed using a To-Do record whenever a campaign has been submitted.

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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.
3. You can determine which lectures participants attend.
4. Upon receiving responses, e.g. to invitations, enter the responses.
5. Once the event has been held, you need to enter whether participants actually attended the event.

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.

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 (>> on page 283), 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.

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: 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.

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 (>> on page 283), 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.

You can rate the venue, the speakers of the event, and provide an overall rating.

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, 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.

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: 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**

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

Customer Service

Learn how to handle customer service tasks.

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. You can display the ticket hierarchy.
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.

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.

Note: Your administrator needs to define that tasks can be added to tickets. In Aurea CRM win, this is defined in the desktop settings, see [Link](#) tab in the Aurea CRM win Administrator Guide.



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).

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 is 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.

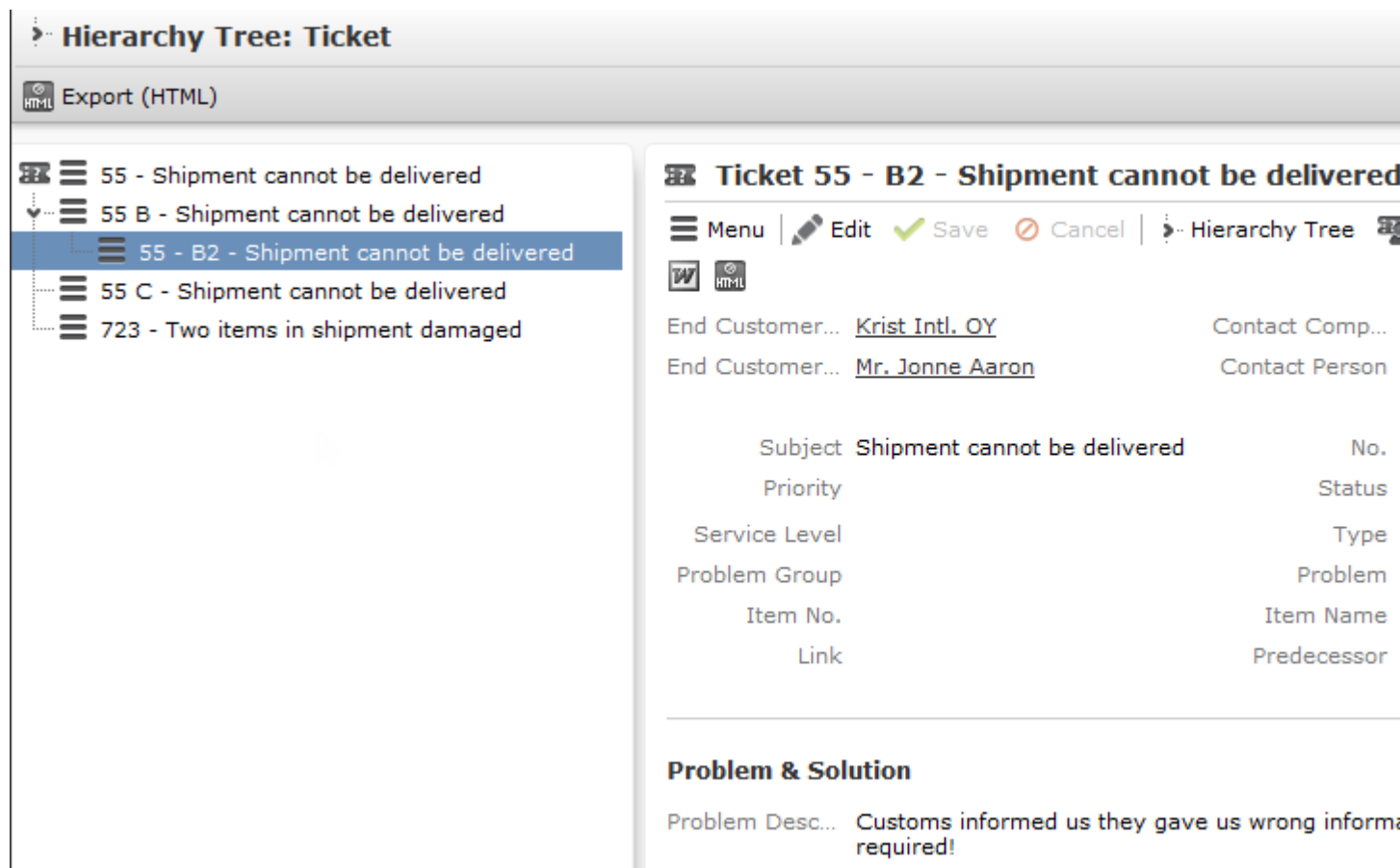
If more than one customer notifies you of a problem, resulting in more than one ticket for the same problem that are subsequently linked with each other, these related tickets are also displayed in the tree.

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.



The screenshot shows a software interface for managing tickets. On the left, a 'Hierarchy Tree: Ticket' is displayed, showing a tree structure of related tickets. The selected ticket is '55 - B2 - Shipment cannot be delivered'. On the right, the details for this ticket are shown, including the subject, priority, service level, problem group, item number, and link. The 'Problem & Solution' section is also visible, showing the problem description: 'Customs informed us they gave us wrong information required!'.

Hierarchy Tree: Ticket

Export (HTML)

- 55 - Shipment cannot be delivered
- 55 B - Shipment cannot be delivered
 - 55 - B2 - Shipment cannot be delivered**
 - 55 C - Shipment cannot be delivered
- 723 - Two items in shipment damaged

Ticket 55 - B2 - Shipment cannot be delivered

Menu | Edit | Save | Cancel | Hierarchy Tree

End Customer... Krist Intl. OY | Contact Comp...
 End Customer... Mr. Jonne Aaron | Contact Person

Subject	Shipment cannot be delivered	No.
Priority		Status
Service Level		Type
Problem Group		Problem
Item No.		Item Name
Link		Predecessor


Problem & Solution

Problem Desc... Customs informed us they gave us wrong information required!

Rep Skills

Rep skills are defined by your administrator. These qualifications can be taken into account when assigning tickets, >> on page 294. 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 access 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.

Search Tickets

Search Results << < 1 - 5 of 24 > >>

No.	Priority	Subject	Status	Created on	End Customer Co...	Problem	Proo
1...	Medium	Monitor fl...	Open	19.04.2013	Gabrieli	Monitor	Pete
123	Medium	Problem	Open	05.03.2014	SunTea	Maintenance	Kazu

24.04 - 26.04.2014 New Activity ⊖

← Apr 2014 →

W	Mon	Tue	Wed	Thu	Fri	Sat	Sun
14	31	1	2	3	4	5	6
15	7	8	9	10	11	12	13
16	14	15	16	17	18	19	20
17	21	22	23	24	25	26	27
18	28	29	30	1	2	3	4
19	5	6	7	8	9	10	11

Today: Tue 13 May, 2014

Group reps by No grouping
Ticket-related rep

Activity Defaults

Type Telephone

Subject _____

Duration _____

Unit _____

Purpose _____

Reps	Thu 24.04.2014					Fri 25.04.2014				
	04	08	12	16	20	04	08	12	16	20
Chris Aki					☎					
Dominik Landertinger										
John Doe					☎					
Kazuko Kanzaki										
Simon Eder					☎					
Stephen Smith										

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: 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, see [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**.



Note: Note: Additional fields can be transferred from the ticket to the activity, see Aurea CRM web [DispatchingDashboard](#) in the Administrator Guide.

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: 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.

You can display the ticket hierarchy.

14. Save the record.

Note: 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.

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, >> on page 139.

Note: 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.



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).

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 is 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.

Hierarchy Tree: Ticket

Export (HTML)

- 55 - Shipment cannot be delivered
 - 55 B - Shipment cannot be delivered
 - 55 - B2 - Shipment cannot be delivered**
 - 55 C - Shipment cannot be delivered
 - 723 - Two items in shipment damaged

Ticket 55 - B2 - Shipment cannot be delivered

Menu | Edit | Save | Cancel | Hierarchy Tree

End Customer... Krist Intl. OY Contact Comp...

End Customer... Mr. Jonne Aaron Contact Person

Subject	Shipment cannot be delivered	No.
Priority		Status
Service Level		Type
Problem Group		Problem
Item No.		Item Name
Link		Predecessor

Problem & Solution

Problem Desc... Customs informed us they gave us wrong inform... required!

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, >> on page 294. 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, >> on page 154.

Search Tickets

Search Results << < 1 - 5 of 24 > >>

No.	Priority	Subject	Status	Created on	End Customer Co...	Problem	Proo
1...	Medium	Monitor fl...	Open	19.04.2013	Gabrieli	Monitor	Peter
123	Medium	Problem	Open	05.03.2014	SunTea	Maintenance	Kazu

24.04 - 26.04.2014 New Activity

Apr 2014

W	Mon	Tue	Wed	Thu	Fri	Sat	Sun
14	31	1	2	3	4	5	6
15	7	8	9	10	11	12	13
16	14	15	16	17	18	19	20
17	21	22	23	24	25	26	27
18	28	29	30	1	2	3	4
19	5	6	7	8	9	10	11

Today: Tue 13 May, 2014

Group reps by **No grouping**

Ticket-related rep

Activity Defaults

Type **Telephone**

Subject _____

Duration _____

Unit _____

Purpose _____

Reps

	Thu 24.04.2014					Fri 25.04.2014				
	04	08	12	16	20	04	08	12	16	20
Chris Aki					☎					
Dominik Landertinger										
John Doe					☎					
Kazuko Kanzaki										
Simon Eder					☎					
Stephen Smith										

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: **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**, >> on page 152.

Note: Note: Additional fields can be transferred from the ticket to the activity, >> Aurea CRM web *DispatchingDashboard* in the Administrator Guide.

29

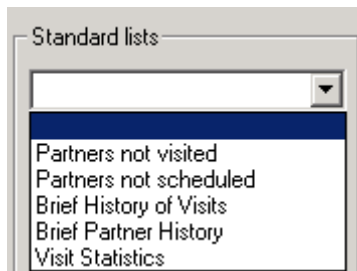
Print Lists

Print Lists

Learn how to fetch partner information from a standard print list.

To access print list, do the following:

1. Select **File > Print** from the menu.
2. Choose one of the standard lists:



Note: Note: If you do not select a standard list, the current info area's mask/list is printed.

You can restrict the data that is printed using the **Selection criteria**.

Aurea CRM win can print the following standard lists:

- Partners not visited
- Partners not scheduled
- Brief partner history
- Brief history of visits
- Visit statistics

Partners Not Visited

This standard list outputs information on companies that have not been visited. A company counts as having been visited if an activity of the type "Visit" with the status "Completed" is stored for the specified time period.

You can limit companies and persons by:

Rep: One page containing the matching companies is output per rep: If a company has several account managers, the company is output for each of these reps. If you do not select any reps, a single list of all companies that have not been visited is printed.

Product: You can select which product groups (as defined in the **Account Manager** info area) to output. If you do not select a product group, all product groups are output.

From/To: Enter a time period to restrict the output to those companies not visited during a specific time period (i.e. there are no "Completed" visits over this time period).

Partners not scheduled

This option outputs a list of companies where no visits have been scheduled (i.e. no "Scheduled" visits are stored for the company).

You can limit companies and persons by:

Rep: One page containing the matching companies is output per rep: If a company has several account managers, the company is output for each of these reps. If you do not select any reps, a single list of all companies without scheduled visits is printed.

Product: You can select which product groups (as defined in the **Account Manager** info area) to output. If you do not select a product group, all product groups are output.

Co. Type: Select company types to restrict the output to companies of those types. If you do not select a company type, all types are output.

Brief History of Visits

This option prints a list of all "Completed" visits for one or more reps.

Enable the **Sum only** to only output sum totals instead of a complete list of all visits.

Rep: One page containing the matching companies is output per rep: If no rep is selected, all activities in the selected time period are printed.

Brief Partner History

This option prints an overview of the information stored on your partners in various info areas.

Each page contains an overview of the data stored in the **Company** and **Person** info areas. The **Activity Overview** section includes the number of completed visits per month.

If contact times have been defined for a company, these times are output. This information is taken from the **Contact Times** info area.

You can limit companies and persons by:

- **Current partner:** Outputs only the current company.
- **Selection:** Restricts the output to those records in a selection. Click on **Load** to choose the selection.

If you leave both options unchecked, information on all partners is printed.

Activity: Enable the **Activity** check box and enter a **Quantity** to determine how many activities to print (the most recent activities are printed if you restrict the number).

Note: Enable the **Note** check box and enter a **Quantity** to determine how many notes to print.

Interests: Prints data in the **Interest** info area.

Targeting: Surveys carried out for partners are printed. This information is taken from the **Survey** and **Survey Results** info areas.

Sample: Prints data in the **Sample** info area.

Sales Group: Prints data in the **Account Manager**, **Contact Times** and **Activity** info areas:

Data	Info Area	Explanation
Product category Account manager Area- Class	Account Manager	A line is output for each account manager.
Visit frequency Visit code	Contact Times	Only output if a contact times record exists for the account manager record.
Last activity	Activity	The last activity (if one exists) involving the rep

Visit Statistics

UpDate Marketing Evaluation	Visit - Statistics	27.07.1999 09:54 Page 1
-----------------------------	--------------------	-------------------------------

Rep.: Robert Miller
Block-No.:
Area:

Period: 01.01.1999 - 31.12.1999
Prod.Cat:

	Total Number	AS a %	Austria	USA	...	Surplus
Total Partners	6	100.00	3	2	...	1
Partners not Visited	1	16.67	0	1	...	0
Partners Visited	5	83.33	3	1	...	1
Number of A Partners	3	50.00	2	0	...	1
A Partners not Visited	0	0.00	0	0	...	0
A Partners Visited	3	100.00	2	0	...	1
A Partners Visited Once	0	66.67	0	0	...	0
A Partners Visited >Once	0	33.33	0	0	...	0
Number of B Partners	2	33.33	1	1	...	0
B Partners not Visited	1	50.00	0	1	...	0
B Partners Visited	1	50.00	1	0	...	0
B Partners Visited Once	0	100.00	0	0	...	0
B Partners Visited >Once	0	0.00	0	0	...	0
Number of C Partners	1	16.67	0	1	...	0
C Partners not Visited	0	0.00	0	0	...	0
C Partners Visited	1	100.00	0	1	...	0
C Partners Visited Once	1	100.00	0	0	...	0
C Partners Visited >Once	0	0.00	0	0	...	0
No. Other Partners	0	0.00	0	0	...	0
Other Partners not Visited	0	0.00	0	0	...	0
Other Partners Visited	0	0.00	0	0	...	0
Other Partners Visited Once	0	0.00	0	0	...	0
Other Partners Visited >Once	0	0.00	0	0	...	0

This option outputs statistics concerning the "Completed" visits within a certain time period. The following information is included:

- The number of companies in a block and area where a specific rep is the account manager
- How many A, B and C partners are assigned to account managers
- How often partners were visited in the selected time period
- Visits statistics for partners that meet specific conditions

The following options are available under **Analyze**:

- **Summary**: Outputs one page per rep.
- **Detail**: Outputs one page per rep, block and product category.

Use the **Selection criteria** to restrict the companies included in the statistics: If you do not select a product, area or a block all companies are output.

The options restrict the companies as follows:

- The **Block no.** and **Area** need to match the value in the company record.
- The **Rep** and **Product** need to match the rep and product category entered in the **Account Manager** record linked to the company.

Note: Note: The **Area** field exists in both the **Company** and the **Account Manager** info areas. However, only the field in the **Company** info area is taken into account. The **Rep** entered person records is also ignored.

The following companies are output:

- Companies where the block number and area match the selection criteria.
- An account manager record has been added for the company that contains at least one of the selected reps and product category (both criteria need to match in a single record).

The partners are classified as A, B, C and other partners. They are classified according to the entry in the **Account Manager** info area (**not** the entry in the **Company** info area). Each category includes a breakdown of the number of partners that were never visited, visited once, or visited several times. The percentage values are always refer to the previous level's entry. "Number of A partners" (=10) is split into "Visited A partners" and "Not visited A partners". Of the 10 A partners, 8 were visited (80%) and 2 were not (20%).

You can define up to 10 sets of conditions that are applied to the next columns. Select **Define Conditions > Company/Person in Company** to define the conditions and save them. These conditions need to be assigned to the print list in the **Configuration** info area. The statistics in these columns only apply to the companies that meet the conditions. The last column contains the companies that are do not match any of the conditions.

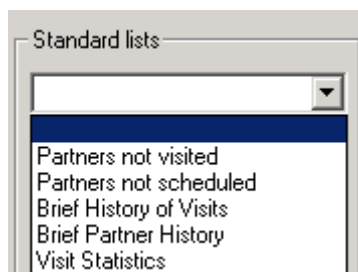
The conditions applied to companies and persons need to be entered in the **Configuration** info area (**Lists** category), e.g.:

- Column 1: Companies in Austria;Owner;Austria
- Column 2: Companies in Switzerland;Owner;Switzerland

- ...
- Column 10: Companies in the US;Priority 1;USA

Accessing the Print Lists

1. Select **File > Print** from the menu.
2. Choose one of the standard lists:



Note: Note: If you do not select a standard list, the current info area's mask/list is printed.

You can restrict the data that is printed using the **Selection criteria**.

Partners Not Visited

This standard list outputs information on companies that have not been visited. A company counts as having been visited if an activity of the type "Visit" with the status "Completed" is stored for the specified time period.

You can limit companies and persons by:

Rep: One page containing the matching companies is output per rep: If a company has several account managers, the company is output for each of these reps. If you do not select any reps, a single list of all companies that have not been visited is printed.

Product: You can select which product groups (as defined in the **Account Manager** info area) to output. If you do not select a product group, all product groups are output.

From/To: Enter a time period to restrict the output to those companies not visited during a specific time period (i.e. there are no "Completed" visits over this time period).

Partners not scheduled

This option outputs a list of companies where no visits have been scheduled (i.e. no "Scheduled" visits are stored for the company).

You can limit companies and persons by:

Rep: One page containing the matching companies is output per rep: If a company has several account managers, the company is output for each of these reps. If you do not select any reps, a single list of all companies without scheduled visits is printed.

Product: You can select which product groups (as defined in the **Account Manager** info area) to output. If you do not select a product group, all product groups are output.

Co. Type: Select company types to restrict the output to companies of those types. If you do not select a company type, all types are output.

Brief History of Visits

This option prints a list of all "Completed" visits for one or more reps.

Enable the **Sum only** to only output sum totals instead of a complete list of all visits.

Rep: One page containing the matching companies is output per rep: If no rep is selected, all activities in the selected time period are printed.

Brief Partner History

This option prints an overview of the information stored on your partners in various info areas.

Each page contains an overview of the data stored in the **Company** and **Person** info areas. The **Activity Overview** section includes the number of completed visits per month.

If contact times have been defined for a company, these times are output. This information is taken from the **Contact Times** info area.

You can limit companies and persons by:

- **Current partner:** Outputs only the current company.
- **Selection:** Restricts the output to those records in a selection. Click on **Load** to choose the selection.

If you leave both options unchecked, information on all partners is printed.

Activity: Enable the **Activity** check box and enter a **Quantity** to determine how many activities to print (the most recent activities are printed if you restrict the number).

Note: Enable the **Note** check box and enter a **Quantity** to determine how many notes to print.

Interests: Prints data in the **Interest** info area.

Targeting: Surveys carried out for partners are printed. This information is taken from the **Survey** and **Survey Results** info areas.

Sample: Prints data in the **Sample** info area.

Sales Group: Prints data in the **Account Manager**, **Contact Times** and **Activity** info areas:

Data	Info Area	Explanation
Product category Account manager Area- Class	Account Manager	A line is output for each account manager.
Visit frequency Visit code	Contact Times	Only output if a contact times record exists for the account manager record.
Last activity	Activity	The last activity (if one exists) involving the rep

Visit Statistics

UpDate Marketing Evaluation	Visit - Statistics	27.07.1999 09:54 Page 1
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Rep.: Robert Miller

Block-No.:

Period: 01.01.1999 - 31.12.1999

Prod.Cat.:

Area:

	Total Number	AS a %	Austria	USA	...	Surplus
Total Partners	6	100.00	3	2	...	1
Partners not Visited	1	16.67	0	1	...	0
Partners Visited	5	83.33	3	1	...	1
Number of A Partners	3	50.00	2	0	...	1
A Partners not Visited	0	0.00	0	0	...	0
A Partners Visited	3	100.00	2	0	...	1
A Partners Visited Once	0	66.67	0	0	...	0
A Partners Visited >Once	0	33.33	0	0	...	0
Number of B Partners	2	33.33	1	1	...	0
B Partners not Visited	1	50.00	0	1	...	0
B Partners Visited	1	50.00	1	0	...	0
B Partners Visited Once	0	100.00	0	0	...	0
B Partners Visited >Once	0	0.00	0	0	...	0
Number of C Partners	1	16.67	0	1	...	0
C Partners not Visited	0	0.00	0	0	...	0
C Partners Visited	1	100.00	0	1	...	0
C Partners Visited Once	1	100.00	0	0	...	0
C Partners Visited >Once	0	0.00	0	0	...	0
No. Other Partners	0	0.00	0	0	...	0
Other Partners not Visited	0	0.00	0	0	...	0
Other Partners Visited	0	0.00	0	0	...	0
Other Partners Visited Once	0	0.00	0	0	...	0
Other Partners Visited >Once	0	0.00	0	0	...	0

This option outputs statistics concerning the "Completed" visits within a certain time period. The following information is included:

- The number of companies in a block and area where a specific rep is the account manager
- How many A, B and C partners are assigned to account managers
- How often partners were visited in the selected time period
- Visits statistics for partners that meet specific conditions

The following options are available under **Analyze**:

- **Summary**: Outputs one page per rep.
- **Detail**: Outputs one page per rep, block and product category.

Use the **Selection criteria** to restrict the companies included in the statistics: If you do not select a product, area or a block all companies are output.

The options restrict the companies as follows:

- The **Block no.** and **Area** need to match the value in the company record.
- The **Rep** and **Product** need to match the rep and product category entered in the **Account Manager** record linked to the company.

Note: Note: The **Area** field exists in both the **Company** and the **Account Manager** info areas. However, only the field in the **Company** info area is taken into account. The **Rep** entered person records is also ignored.

The following companies are output:

- Companies where the block number and area match the selection criteria.
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The partners are classified as A, B, C and other partners. They are classified according to the entry in the **Account Manager** info area (**not** the entry in the **Company** info area). Each category includes a breakdown of the number of partners that were never visited, visited once, or visited several times. The percentage values always refer to the previous level's entry. "Number of A partners" (=10) is split into "Visited A partners" and "Not visited A partners". Of the 10 A partners, 8 were visited (80%) and 2 were not (20%).

You can define up to 10 sets of conditions that are applied to the next columns. Select **Define Conditions > Company/Person in Company** to define the conditions and save them. These conditions need to be assigned to the print list in the **Configuration** info area. The statistics in these columns only apply to the companies that meet the conditions. The last column contains the companies that do not match any of the conditions.

The conditions applied to companies and persons need to be entered in the **Configuration** info area (**Lists** category), e.g.:

- Column 1: Companies in Austria;Owner;Austria
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- ...
- Column 10: Companies in the US;Priority 1;USA