10.0

CRM

ComputerEase

Software for Contractors

ComputerEase Version 10.0

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CRM

Part I

1 CRM

The CRM (Customer Relationship Management) module is fully integrated with the rest of ComputerEase and includes all of the features that you need to manage your customers, create leads, and win jobs. The CRM module makes it easy to set up and track companies, contacts, and opportunities throughout the sales process. Once your prospects become customers they will already be entered in the system thanks to the module's full integration with the rest of ComputerEase.

1.1 What is the CRM module?

1.1.1 Features in CRM

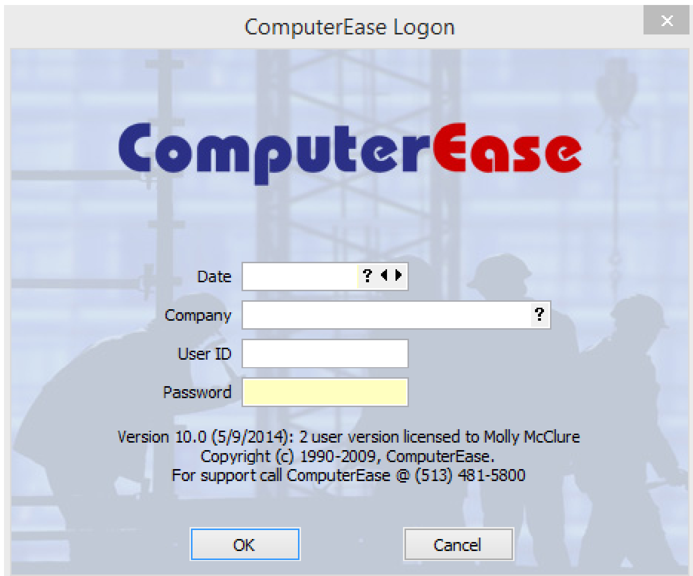
The CRM module contains several features that you will use to manage your customers and keep track of where you are in the sales process. Some of these features are:

- Creating and Editing Companies. This allows you to enter and organize all of your customers and prospects.
- Creating and Editing Contacts. This allows you to enter and track all of your contacts within companies.
- Creating and Editing Opportunities. This allows you to enter and monitor your sales opportunities.
- Search Center provides a convenient way to search for companies, contacts, opportunities, and tasks.
- Sales Center makes it easy to see where you are with your sales opportunities.
- Adding and Editing Tasks. This allows you to create and assign tasks to users and then notify them through email and Outlook calendars.

1.2 How Do I Set Up CRM in ComputerEase?

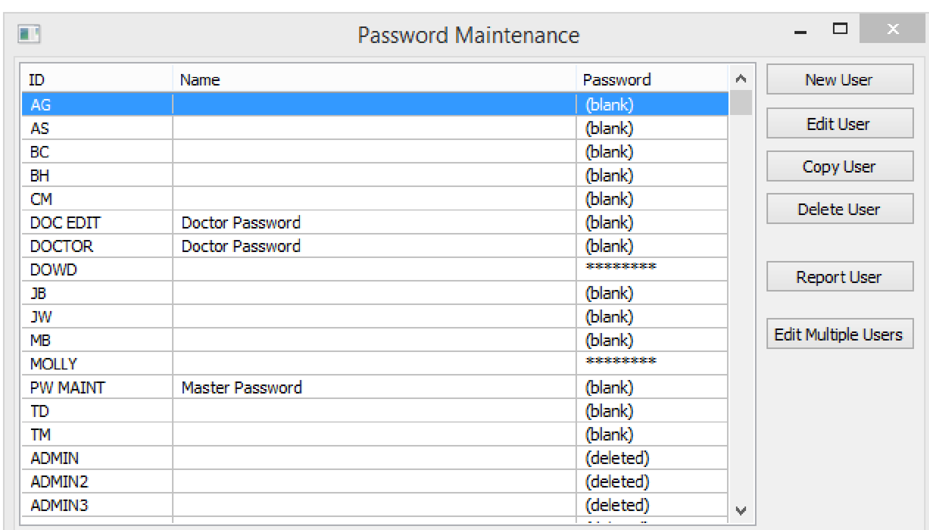
1.2.1 Configuring CRM Users

Open the ComputerEase Logon screen

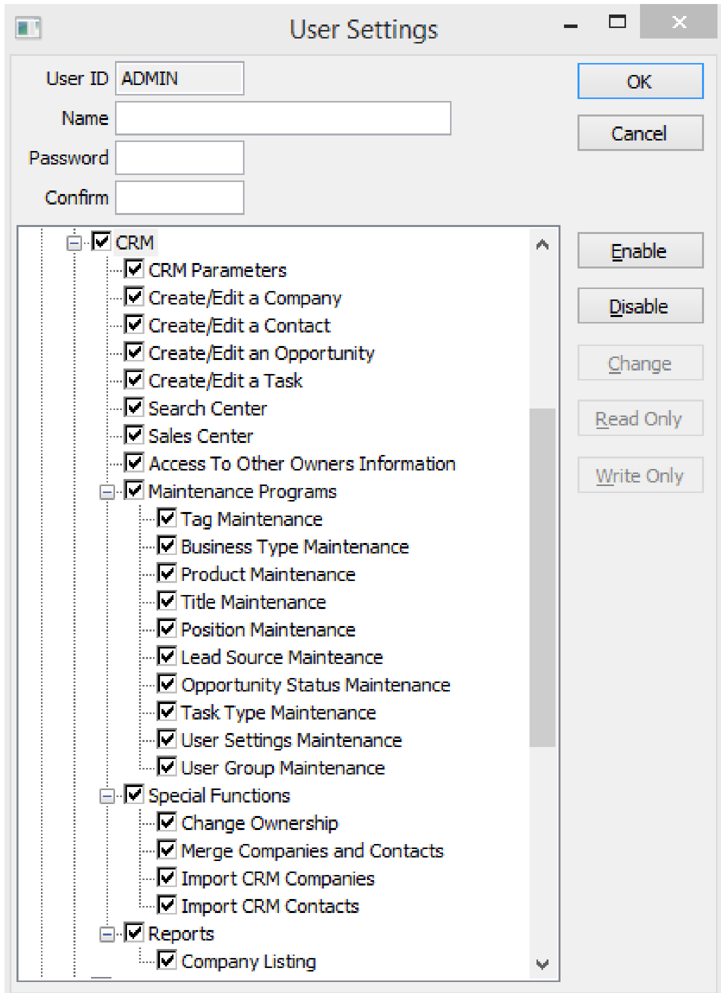


In the **Company** field, select the company for which you will be creating users.

Type "PW MAINT" in the **User ID** field and enter your "PW MAINT" password in the **Password** field. Click **OK**.



Select the user to whom you would like to grant CRM access and click Edit User.



Select the CRM items that you would like to allow the user to access and click OK.

The user will now be able to access the CRM module the next time they log into

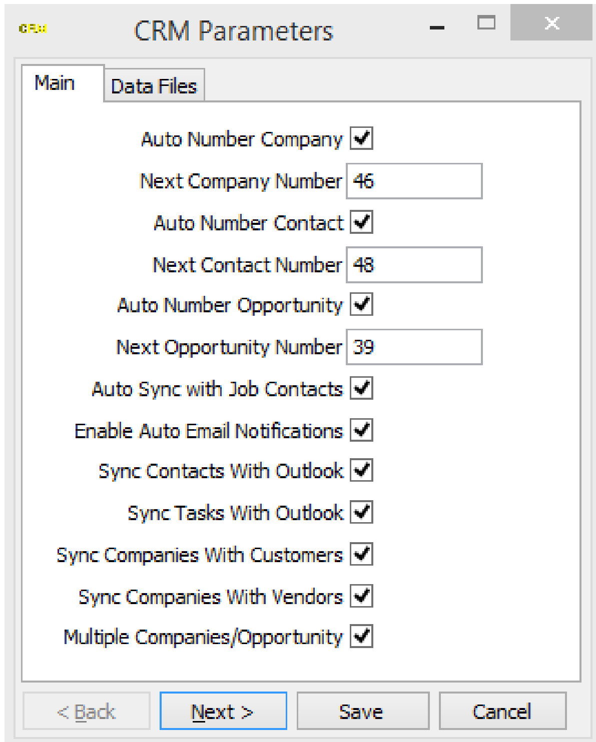
ComputerEase.

1.2.2 Configuring CRM Parameters

The CRM Parameters need to be configured to determine how you would like to number your items and whether you want to sync your contacts in the CRM module with your contacts in the Job Costing/Project Management module. You can also enable Email notifications and sync contacts and tasks with Outlook.

Select **Configure / System Parameters / CRM Parameters.**

Main Tab



Auto Number Company - Check this box if you want new companies entered to be automatically numbered by ComputerEase. If you choose this option, enter the first number you want to use in the **Next Company Number** field.

Auto Number Contact - Check this box if you want new contacts entered to be automatically numbered by ComputerEase. If you choose this option, enter the first number you want to use in the **Next Contact Number** field.

Auto Number Opportunity - Check this box if you want new opportunities entered to be automatically numbered by ComputerEase. If you choose this option, enter the first number you want to use in the **Next Opportunity Number** field.

Auto Sync with Job Contacts - Check this box to automatically sync changes to contacts in CRM with changes to contacts in the Job Costing/Project Management module.

Enable Auto Email Notification - Check this box if you want users to automatically receive an email notification when an opportunity has been assigned to them.

Sync Contacts with Outlook - Check this box if you want your contacts in CRM to be automatically synced with your address book in Outlook.

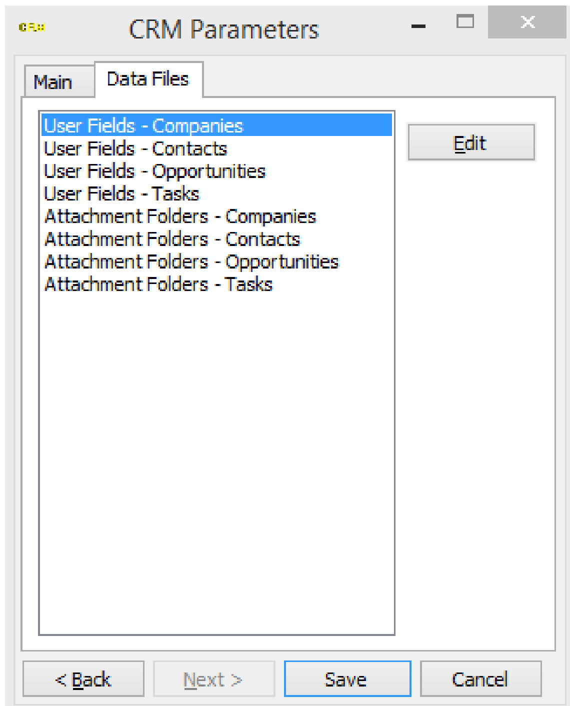
Sync Tasks with Outlook - Check this box if you want your assigned CRM tasks to be automatically synced with Outlook.

Sync Companies with Customers - Check this box to automatically sync CRM companies with customers in the rest of the ComputerEase system.

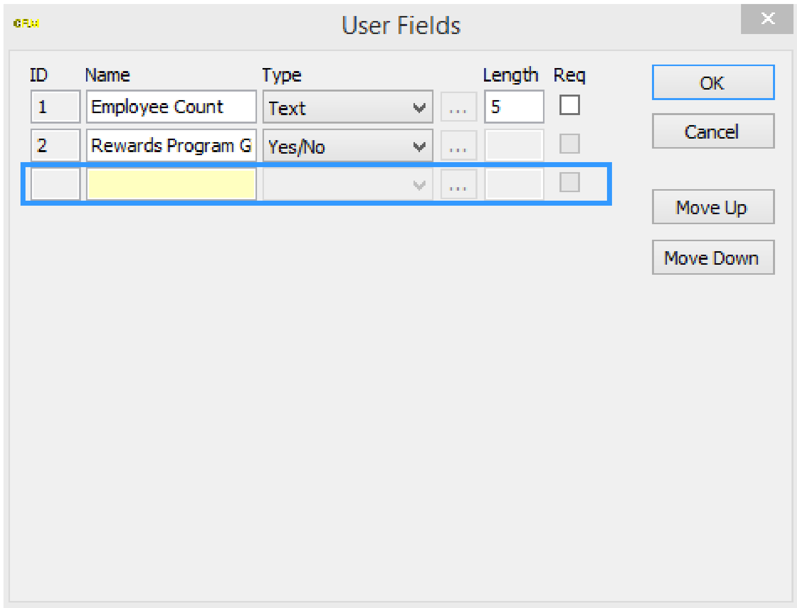
Sync Companies with Vendors - Check this box to automatically sync CRM companies with vendors in the rest of the ComputerEase system.

Multiple Companies/Opportunity - Check this box if you want to allow multiple companies to be added to an opportunity.

Data Files Tab



User Fields - This is where you will create user-defined fields for your Companies, Contacts, Opportunities, and/or Tasks. A user-defined field is an additional field you create to log information that will be available in various Qtool reports, Word Templates and/or Excel Templates, or is just used for informational purposes. To create or edit user fields, highlight the user field selection of your choice and click on **Edit**.



Name - Enter the name of the field you would like to create here.

Type - Select the type of field from the drop down. Your choices are **Choice**, **Date**, **Number**, **Phone Number**, **Text**, **True/False** and **Yes/No**.

... - Select this box to enter the choices that will be available to the user if the field type is **Choice**.

Length - This field must be assigned a value if your user field type is either **Text** or **Number.** This will restrict the length of entries for this user field to the number of characters entered here.

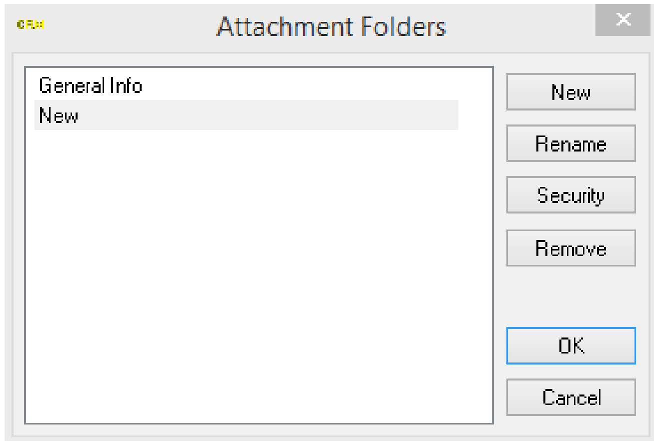
Req - Check this box if this is to be a required field for all entries of the relevant type. If this box is checked, a user may not save a the relevant item into your database without entering a value for this field. For example, a required user field for contacts will require that an entry is made into that user field for each contact.

Move Up - Highlight a field that you want to move up in the list and click on this box in order to change the order in which your user fields appear.

Move Down - Highlight a field that you want to move down in the list and click on this box in order to change the order in which your user fields appear.

Click on **OK** to save your changes and close the screen, or **Cancel** to exit the screen without saving changes.

Attachment Folders - Here you will create any attachment folders you want to use for organizing the files you attach to your Company, Contact, Opportunity, and/or Task files.



New - Click here to create a new attachment folder.

Rename - Click here to rename an existing folder.

Security - Click here to set security for a folder on your server. This will allow you to restrict access to this folder to only certain Windows users or user groups.

Remove - Click here to remove the attachment folder.

Click on **OK** to save your changes and close the screen, or **Cancel** to exit the screen without saving changes.

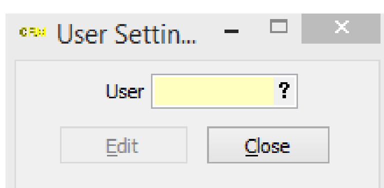
Once you have entered the correct information in each of the tabs and fields above, click **Save** or press **F10** to save the information and close the screen. You are now ready to use your CRM module in ComputerEase.

1.3 Maintenance Programs

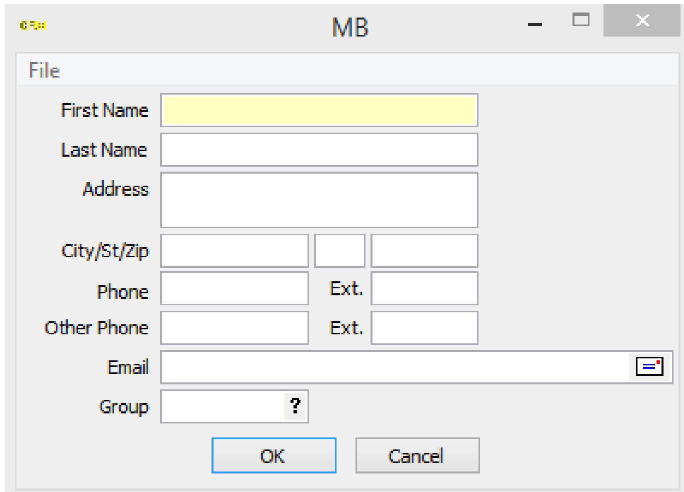
1.3.1 User Settings Maintenance

Before you begin using CRM, you will want to ensure that your CRM users are set up correctly in order to effectively use all of the available features.

Select **CRM / Maintenance Programs / User Settings Maintenance.**



User - Enter or choose the ComputerEase user and then click **Edit**.



First Name - Enter the user's first name.

Last Name - Enter the user's last name.

Address - Enter the user's address.

City/St/Zip - Enter the user's city, state, and zip code.

Phone - Enter the user's primary phone number and **Ext**.

Other Phone - Enter the user's secondary phone number and **Ext.** if needed.

Email - Enter the user's email address. If you chose to enable **Auto Email Notifications**, this is the email address where the notifications will be sent for this user.

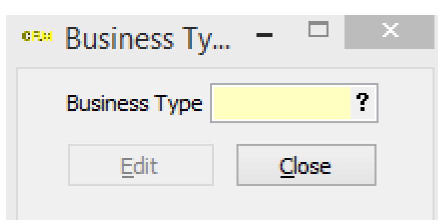
Group - Select the user group. Groups are configured using **User Group Maintenance.**

When you are finished, press **OK** to save your changes or **Cancel** to leave the screen without saving your changes.

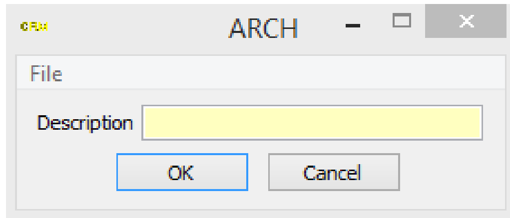
1.3.2 Business Type Maintenance

Business Type Maintenance allows you to track customers and prospects by grouping them by business type.

Select **CRM / Maintenance Programs / Business Type Maintenance**



Business Type - Enter or choose the Business Type and click **Edit**.



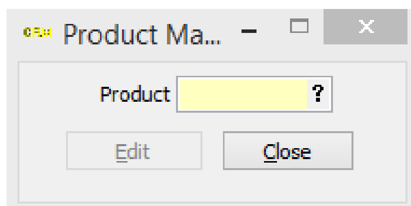
Description - Enter a description of the Business Type.

When you are finished, press **OK** to save your changes or **Cancel** to leave the screen without saving your changes.

1.3.3 Product Maintenance

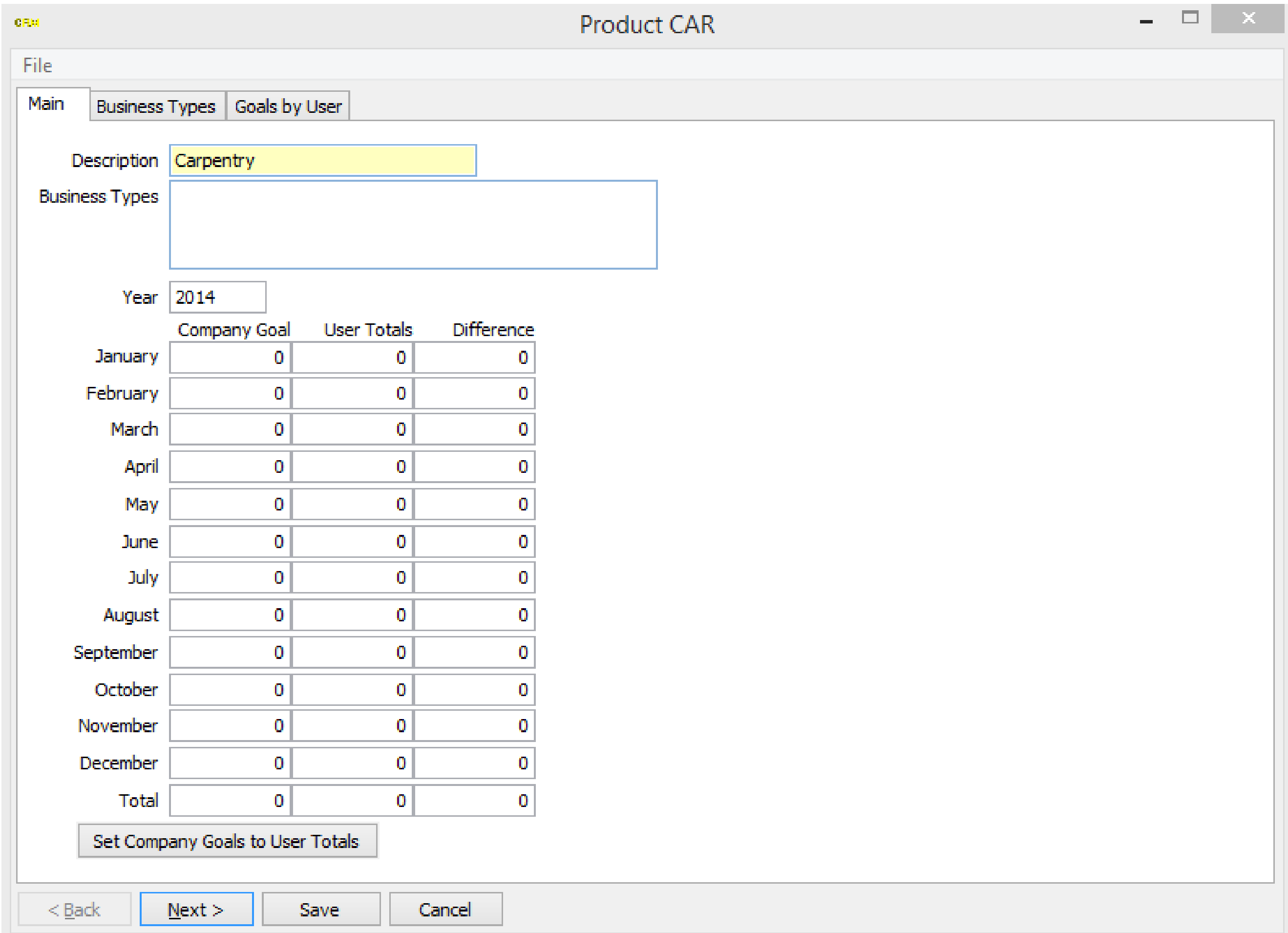
Product Maintenance allows you to set up sales goals for your company. These goals can be set for the company as a whole, or for specific product/service lines or users. Once you set your goals you will be able to use the reporting features to track how your sales team is performing.

Select **CRM / Maintenance Programs / Product Maintenance**



Product - Enter or choose the Product and click Edit.

Main Tab



Description – Type in the description of the department or product/service for which this goal will be set.

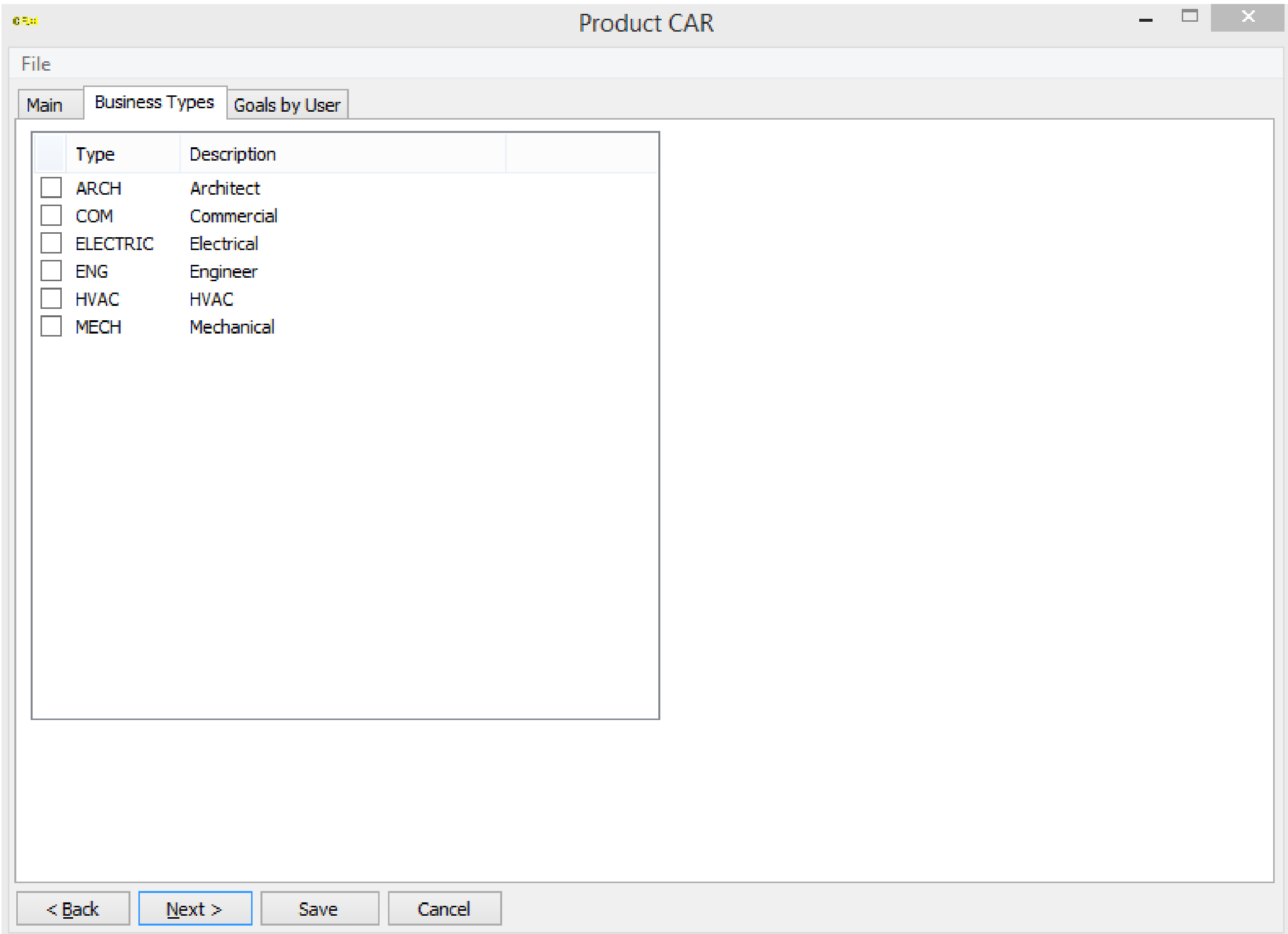
Business Types - Type in the business types of the department or product/service. Business types can also be selected on the **Business Types** tab.

Year - Type in the year for which you are setting the goal.

Company Goal - In this column, enter the sales goal for each month for the company. The **Total** will populate as you enter your monthly goals. The **User Totals** and **Difference** columns will populate when you fill in the **Goals by User** tab.

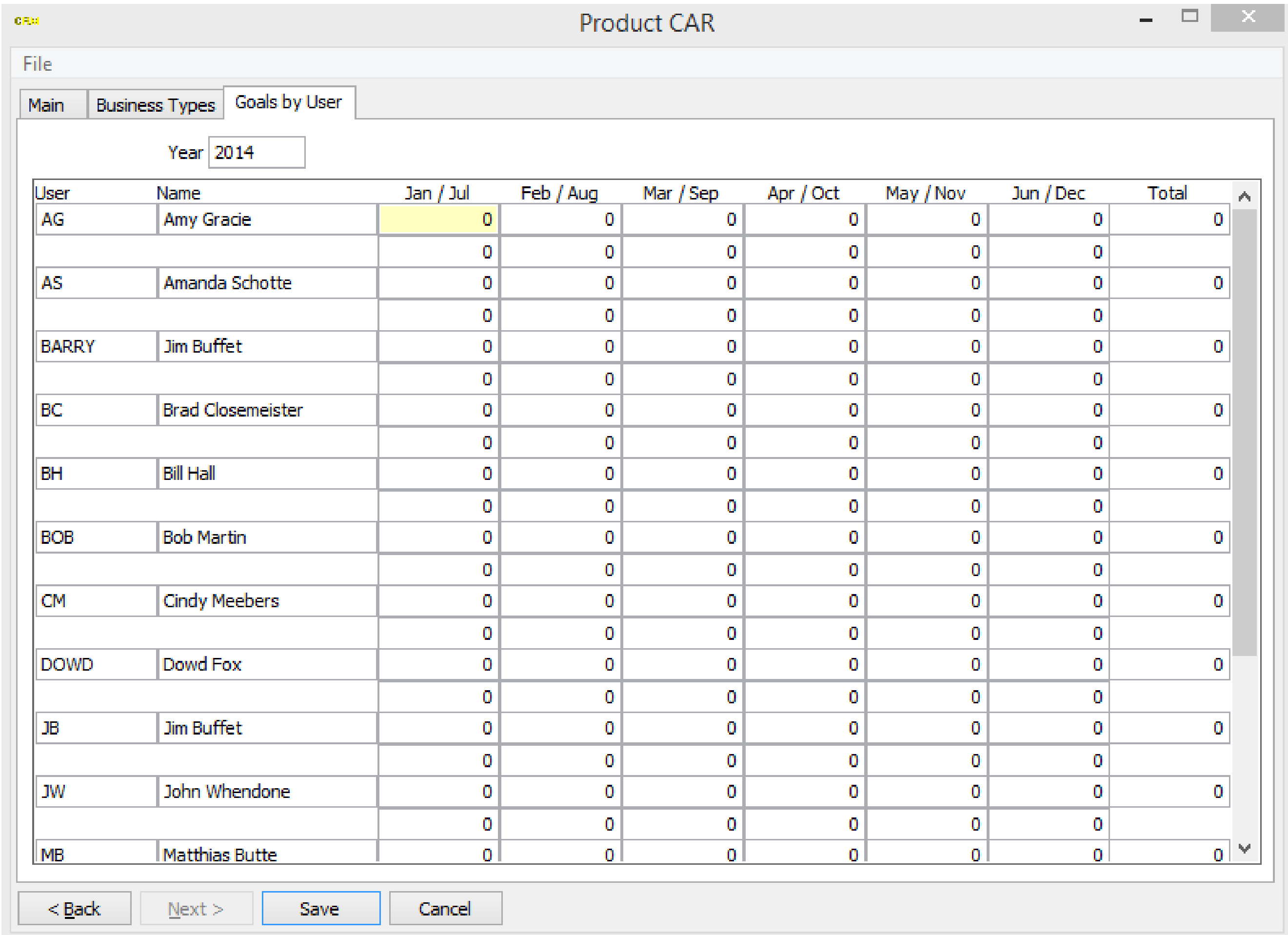
Set Company Goals to User Totals - Clicking this button will set the **Company Goals** column to display the **User Totals.**

Business Types Tab



Business Types - Select the business types of the department or product/service. These selected business types will display in the **Business Types** field on the **Main** tab. The items available on this tab are set through **Business Type Maintenance.**

Goal by User Tab



Year - Enter the year for which you are setting the goals.

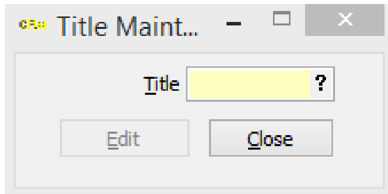
Users Table - This table will be automatically populated with all of your CRM users, therefore the **User** and **Name** columns will not be editable. For each user there is a field to enter their sales goal for each month of the year. The **Total** column will automatically populate as you enter the monthly sales goals. The total goals for all users will display in the **User Totals** column on the **Main** tab.

When you are finished, press **OK** to save your changes or **Cancel** to leave the screen without saving your changes.

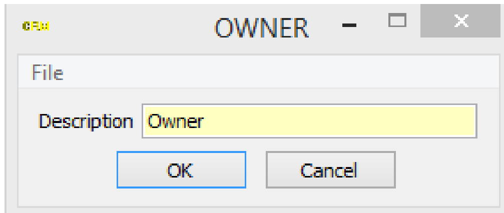
1.3.4 Title Maintenance

Title Maintenance allows you to build a list of job titles for contacts with whom you will be working. You will then be able to select the titles that you set up here when you are entering a new contact.

Select **CRM / Maintenance Programs / Title Maintenance**



Title - Enter or choose the title and click Edit.



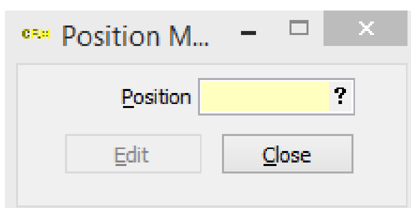
Description - Enter a description of the title.

When you are finished, press **OK** to save your changes or **Cancel** to leave the screen without saving your changes.

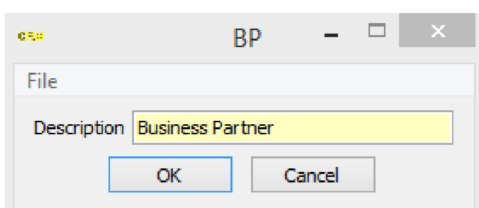
1.3.5 Position Maintenance

Position Maintenance allows you to build relationships for a job. These relationships may not be the ultimate decision maker, but they may have a direct influence on whether or not you win a job. Once you build your list of positions, you can assign companies or contacts to a position for an opportunity.

Select **CRM / Maintenance Programs / Position Maintenance**



Position - Enter or choose the position and click Edit.



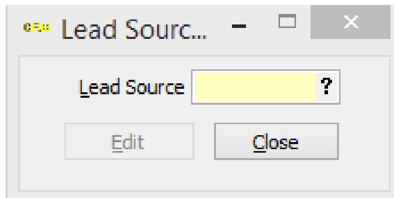
Description - Enter a description of the position.

When you are finished, press **OK** to save your changes or **Cancel** to leave the screen without saving your changes.

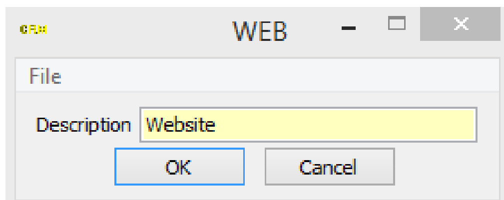
1.3.6 Lead Source Maintenance

Lead Source Maintenance allows you to build a list of lead sources so that you can track where your leads are coming from. You will then be able to select these lead sources when you are entering a new opportunity.

Select **CRM / Maintenance Programs / Lead Source Maintenance**



Lead Source - Enter or choose the lead source and click Edit.



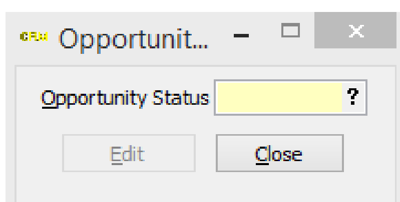
Description - Enter a description of the lead source.

When you are finished, press **OK** to save your changes or **Cancel** to leave the screen without saving your changes.

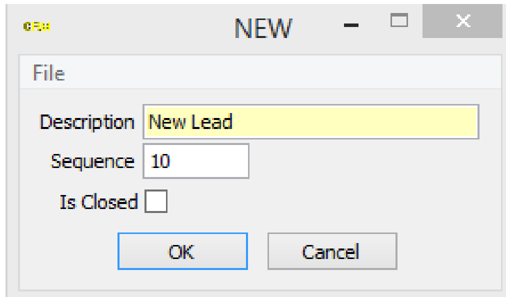
1.3.7 Opportunity Status Maintenance

Opportunity Status Maintenance allows you to create a sequence for your sales process. You will then be able to select from the statuses that you set up here when you are entering or updating an opportunity.

Select **CRM / Maintenance Programs / Opportunity Status Maintenance**



Opportunity Status - Enter or choose the opportunity status and click Edit.



Description - Enter a description of the opportunity status.

Sequence - Enter the sequence number for the opportunity status. You may want to leave space between your sequence numbers in case you want to add new opportunity statuses in the future.

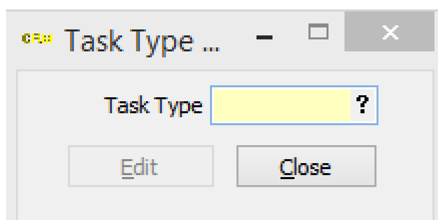
Is Closed - Select this checkbox if this particular opportunity status is the final status in your sales process.

When you are finished, press **OK** to save your changes or **Cancel** to leave the screen without saving your changes.

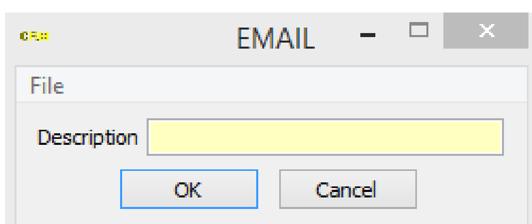
1.3.8 Task Type Maintenance

Task Type Maintenance allows you to build a list of task types. You will then be able to to select from these task types when you add or edit a task.

Select **CRM / Maintenance Programs / Task Type Maintenance**



Task Type - Enter or choose the task type and click Edit.



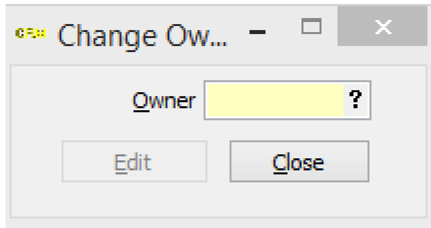
Description - Enter a description of the task type.

When you are finished, press **OK** to save your changes or **Cancel** to leave the screen without saving your changes.

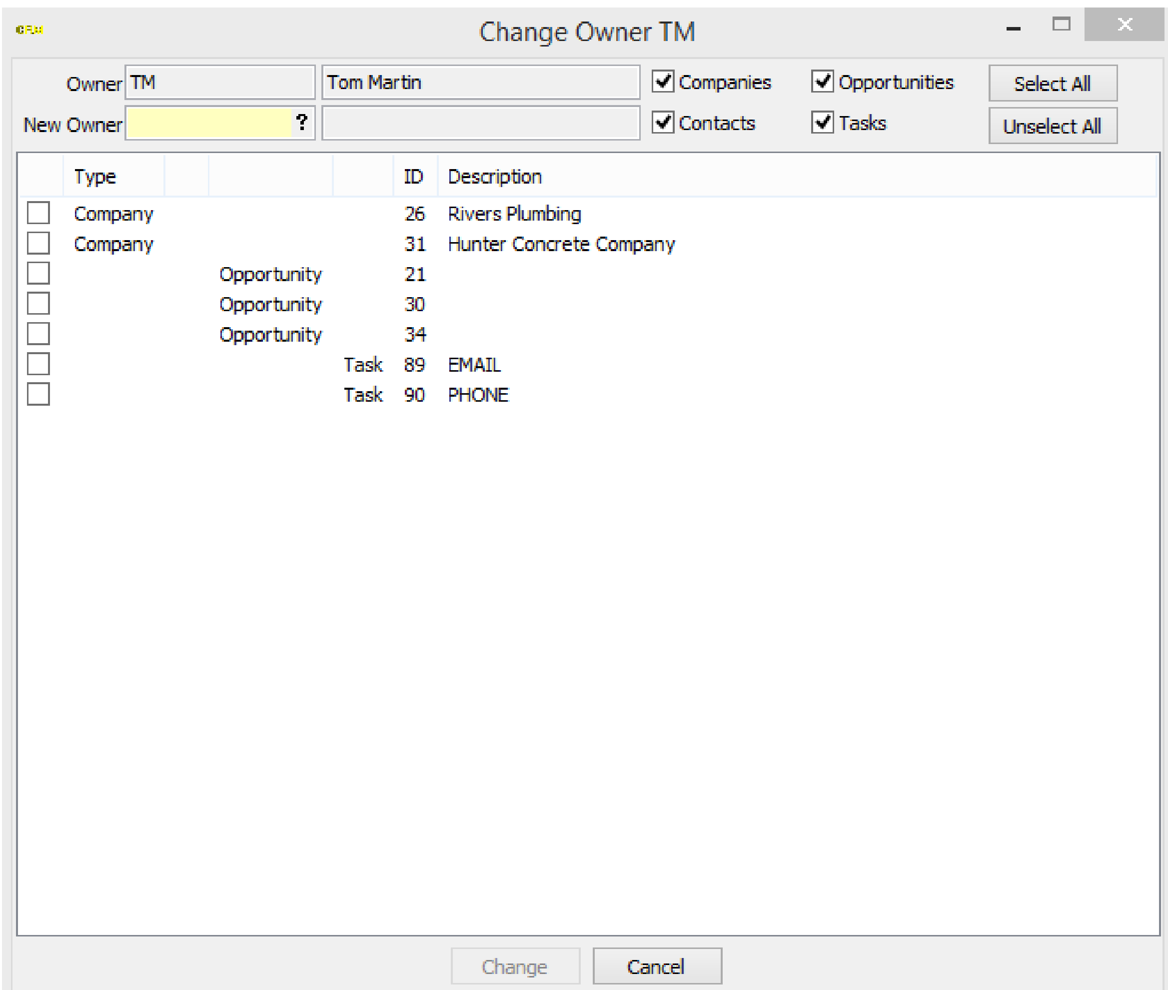
1.3.9 Change Ownership

Change Ownership allows you to easily reassign companies, contacts, opportunities, and tasks to a different user. This allows you to quickly reassign these items if, for instance, you have an employee leave your company or move to a different position.

Select **CRM / Maintenance Programs / Change Ownership**



Owner - Enter or choose the current owner of the companies, contacts, opportunities, or tasks that you want to reassign and click Edit.



Owner - The current owner of the companies, contacts, opportunities, or tasks. This field is not editable.

New Owner - Enter or choose the user to whom you want to reassign the companies, contacts, opportunities, or tasks.

Companies - Select this checkbox to display companies assigned to the current owner.

Contacts - Select this checkbox to display contacts assigned to the current owner.

Opportunities - Select this checkbox to display opportunities assigned to the current owner.

Tasks - Select this checkbox to display tasks assigned to the current owner.

Type - For each item, this column will contain either Company, Contact, Opportunity, or Task.

ID - This column contains the unique ID number assigned to the item.

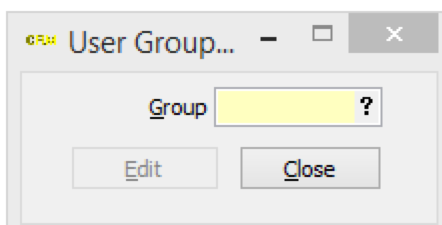
Description - This column contains a description of the item.

Each item can be selected individually in the grid using the checkboxes or you can use the **Select All** or **Unselect All** buttons. Once you have selected the items to reassign, press **Change** to assign the items to the new owner or **Cancel** to leave the screen without saving your changes.

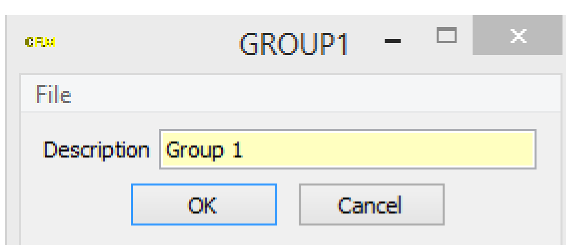
1.3.10 User Group Maintenance

User Group Maintenance allows you to create a way to group multiple users across your company. These groups can then be used to track performance as a group instead of by an individual. Users are assigned to these groups in **User Settings Maintenance.**

Select **CRM / Maintenance Programs / User Group Maintenance**



Group - Enter or choose the group and click Edit.



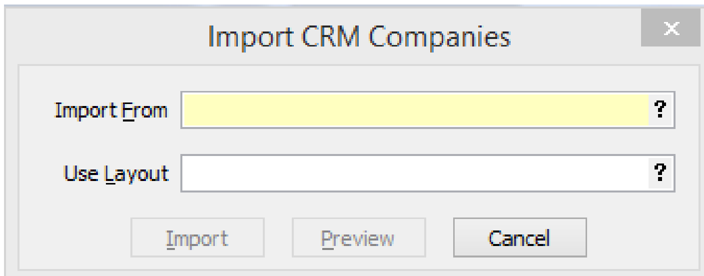
Description - Enter a description of the group.

When you are finished, press **OK** to save your changes or **Cancel** to leave the screen without saving your changes.

1.3.11 Import CRM Companies

Import CRM Companies allows you to import companies from an Excel spreadsheet into the system.

Select **CRM / Maintenance Programs / Import CRM Companies**



Import From - Enter or choose the location of your Excel spreadsheet containing the companies that you want to import.

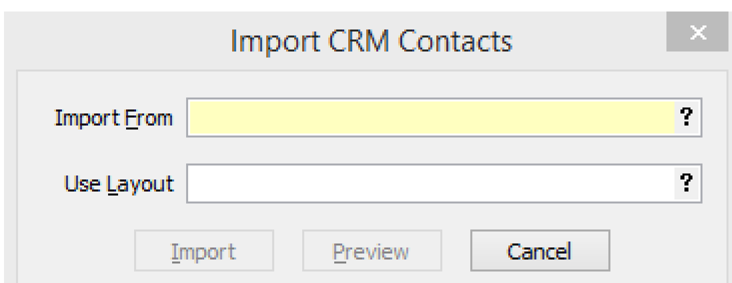
Use Layout - Enter or choose the layout that you want to use to import your companies.

When you are finished, press **Import** to import your data, **Preview** to view your data, or **Cancel** to leave the screen without saving your changes.

1.3.12 Import CRM Contacts

Import CRM Contacts allows you to import contacts from an Excel spreadsheet into the system.

Select **CRM / Maintenance Programs / Import CRM Contacts**



Import From - Enter or choose the location of your Excel spreadsheet containing the contacts that you want to import.

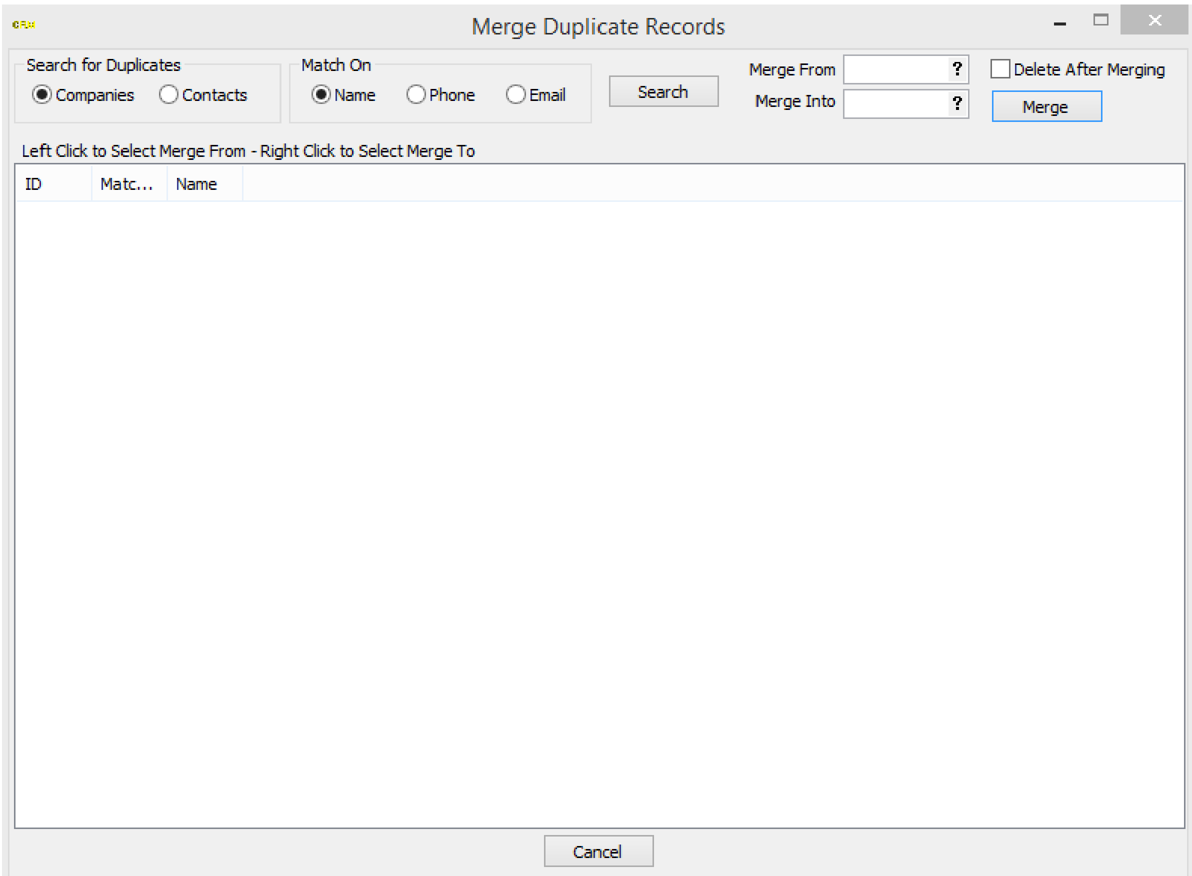
Use Layout - Enter or choose the layout that you want to use to import your contacts.

When you are finished, press **Import** to import your data, **Preview** to view your data, or **Cancel** to leave the screen without saving your changes.

1.3.13 Merge Companies or Contacts

Merge Companies or Contacts allows you to search for and merge duplicate records.

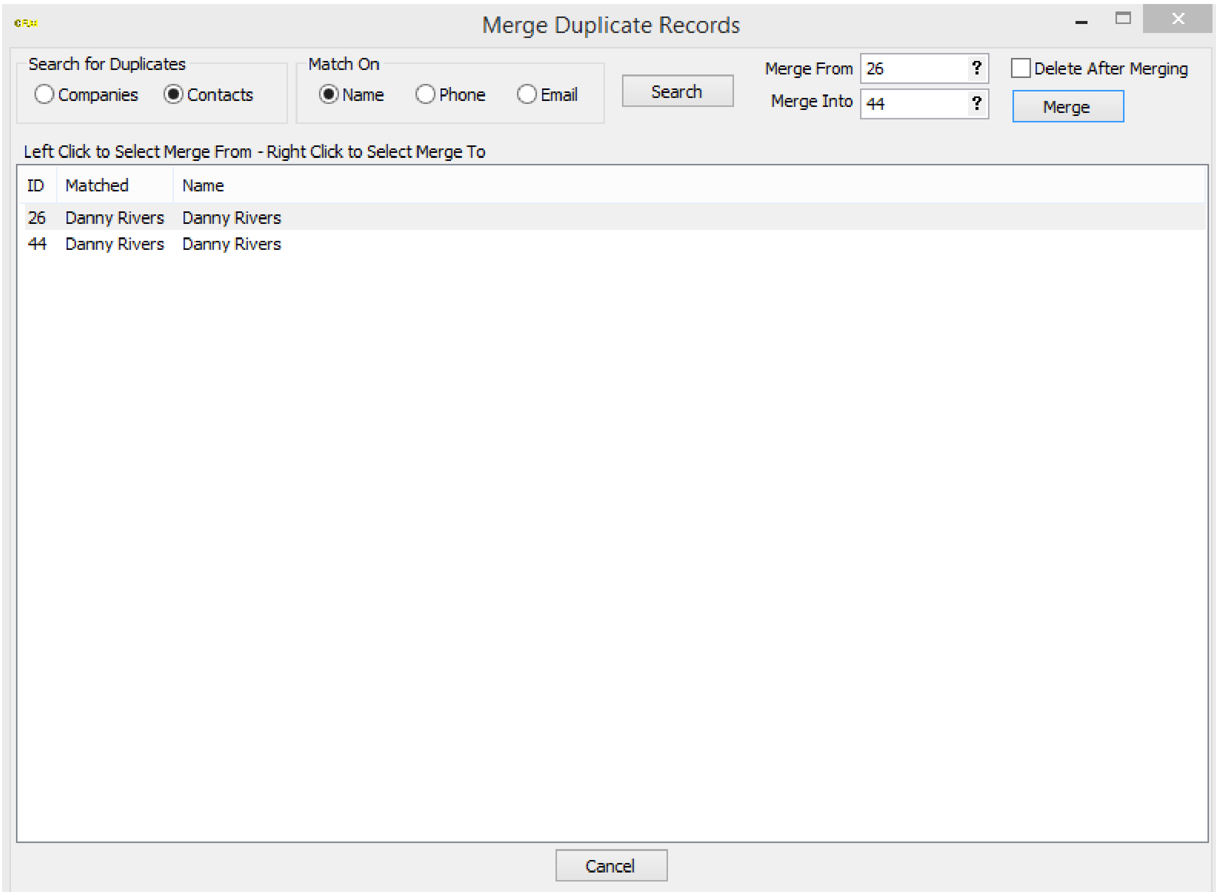
Select **CRM / Maintenance Programs / Merge Companies or Contacts**



Search for Duplicates - Select to search for either duplicate **Companies** or **Contacts**.

Match On - Select to match the duplicate companies or contacts based on **Name, Phone, or Email.**

Click **Search** to display the list of duplicate companies or contacts based on your selected search criteria.



Merge From - Left click on the company or contact in the list or enter or choose the company/contact number that you want to merge from.

Delete After Merging - Select this checkbox if you want the company or contact selected to merge from to be deleted after the merge.

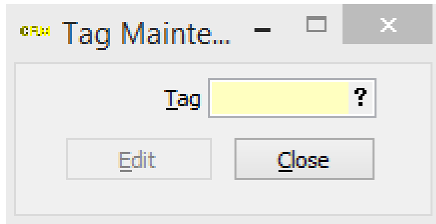
Merge Into - Right click on the company or contact in the list or enter or choose the company/contact number that you want to merge into.

Press **Merge** to merge the selected companies or contacts or **Cancel** to leave the screen without merging.

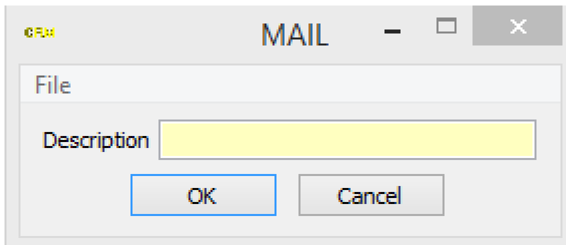
1.3.14 Tag Maintenance

Tag Maintenance allows you to create tags that can be assigned to companies, contacts, or opportunities. You can then search by these tags in the **Search Center**.

Select **CRM / Maintenance Programs / Tag Maintenance**



Tag - Enter or choose the tag and click Edit.



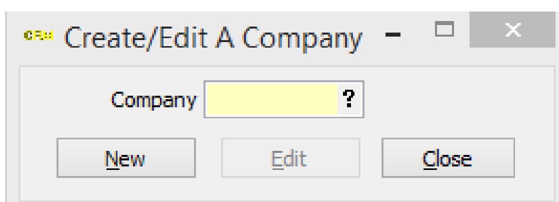
Description - Enter a description of the tag.

When you are finished, press **OK** to save your changes or **Cancel** to leave the screen without saving your changes.

1.4 CRM Companies, Contacts, & Opportunities

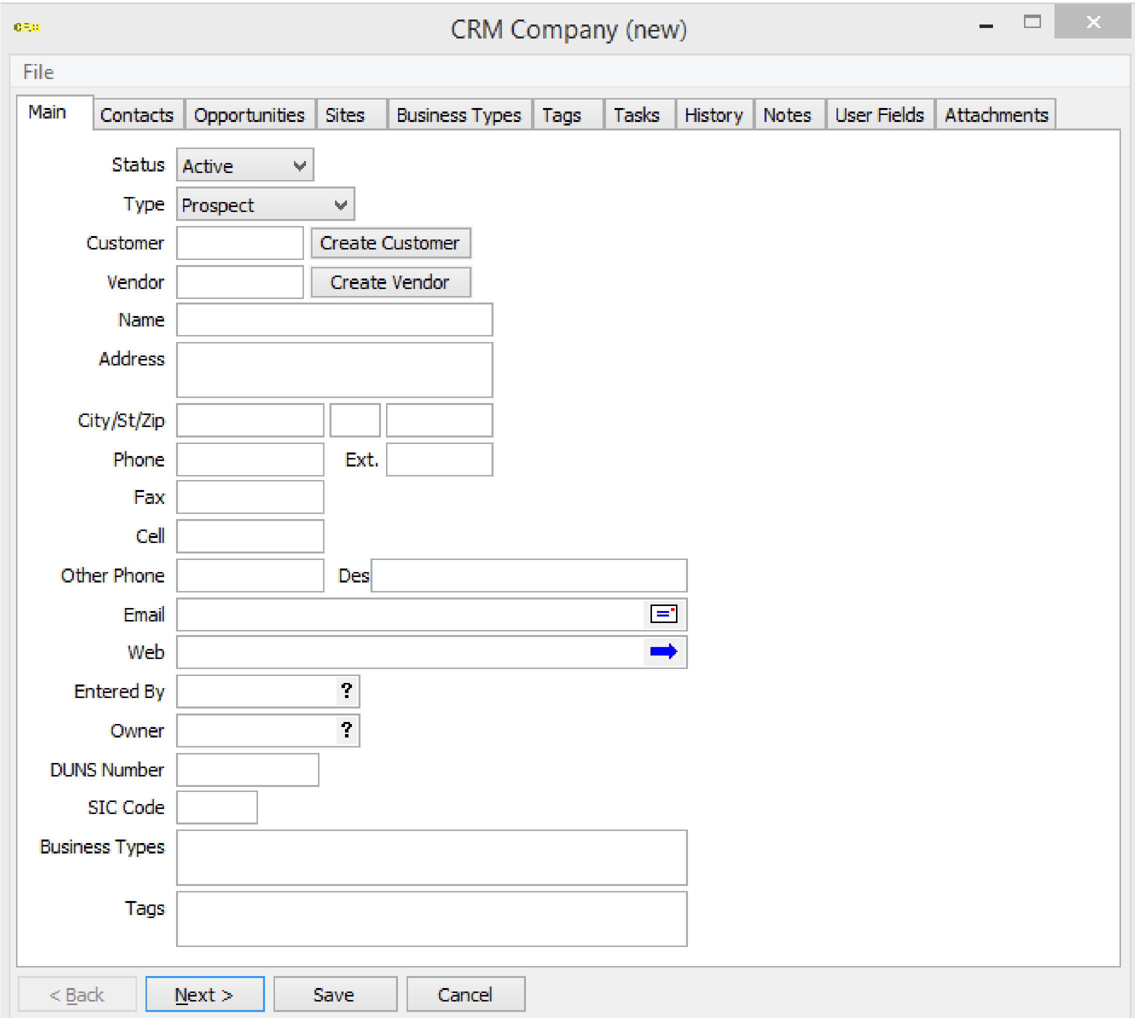
1.4.1 How Do I Set Up Companies in ComputerEase?

Select **CRM / Create/Edit A Company**



Company - Enter or choose the company number and click **Edit** to edit an existing company. Leave blank and click **New** to add a new company.

Main Tab



Status - The system defaults to Active, but you may also select Inactive. Active means the company is currently in use and Inactive will hold the entry for possible future reference.

Type - Choose the type of customer that you are adding. The available options are:

Prospect - The system defaults to Prospect. Choose this option if the company you are entering is a potential customer or sales lead.

Customer - Selecting this option will allow you to either select a customer that already exists in the Accounts Receivable module or add this customer to the Accounts Receivable module in addition to the CRM module.

Vendor - Selecting this option will allow you to either select a vendor that already exists in the Accounts Payable module or add this vendor to the Accounts Payable module in addition to the CRM module.

Internal - Choose this option if you are adding an internal company.

Other - Choose this option if the company you are adding does not meet the criteria for any other selections.

Customer - When Customer is selected for Type, this field becomes active and you can either enter or choose a customer that exists in Accounts Receivable or you can click **Create Customer** to add the customer to the Accounts Receivable module as well as the CRM module.

Vendor - When Vendor is selected for Type, this field becomes active and you can either enter or choose a vendor that exists in Accounts Payable or you can click **Create Vendor** to add the vendor to the Accounts Payable module as well as the CRM module.

Name - Type in the name of the company.

Address - Enter the company's address.

City - Enter the company's city.

State - Enter the company's two character state postal abbreviation.

Zip - Enter the company's zip code.

Phone - Enter the company's phone number.

Fax - Enter the company's fax number.

Cell - Enter the company's cell phone number.

Other Phone - Enter an additional phone number for the company and a description.

Email - Enter the company's email address. If you select the stamped envelope icon after information is entered in this field, ComputerEase will open a new email message to this address.

Web - Enter the company's website address. If you select the arrow icon after information is entered in this field, ComputerEase will open this website in a browser window.

Entered By - Enter or choose the user that entered this company. This field defaults to the logged in user.

Owner - Enter or choose the owner of this company. This field defaults to the logged in user.

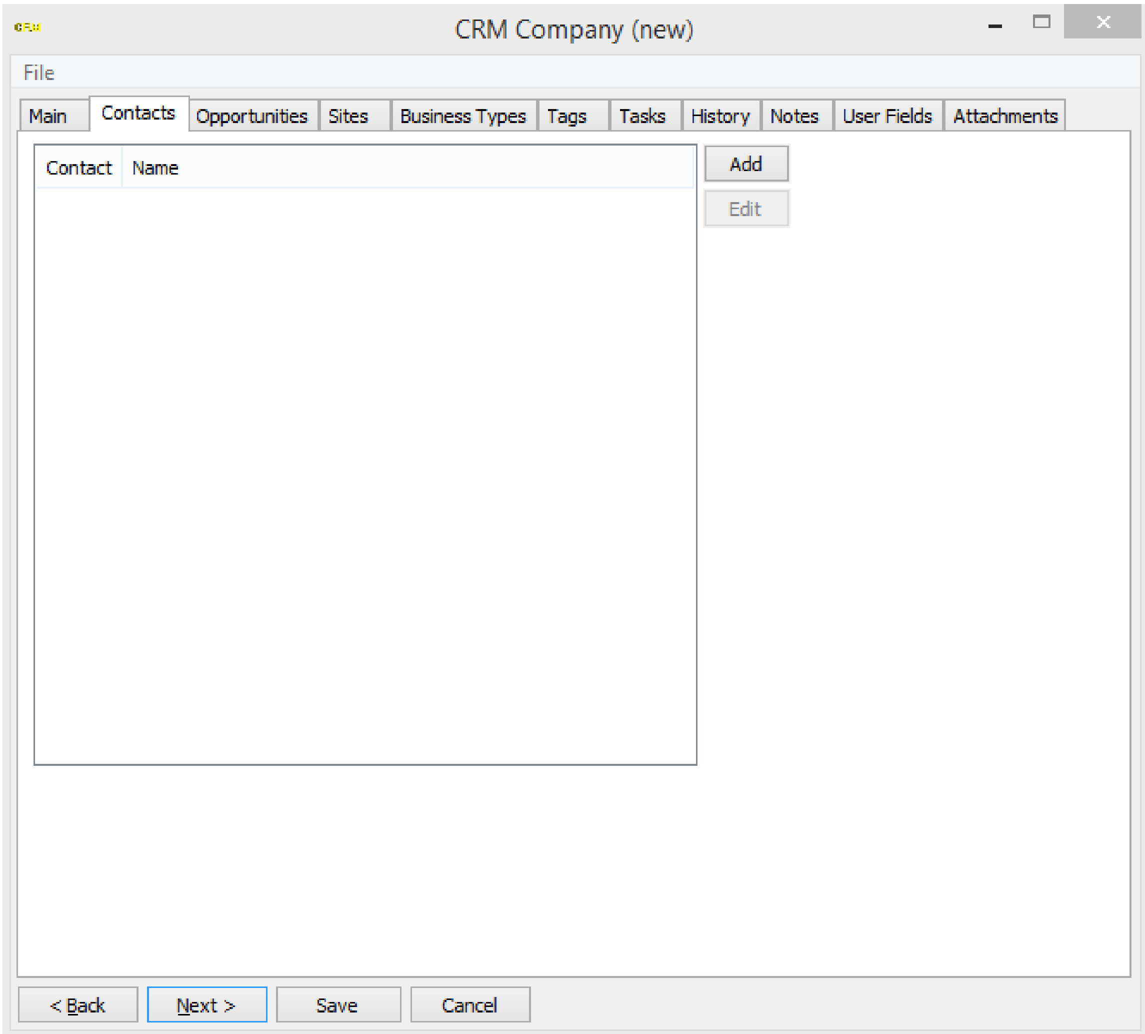
DUNS Number - Enter the company's DUNS number.

SIC Code - Enter the company's SIC code.

Business Types - Business Types that are selected on the **Business Types** tab will by displayed here.

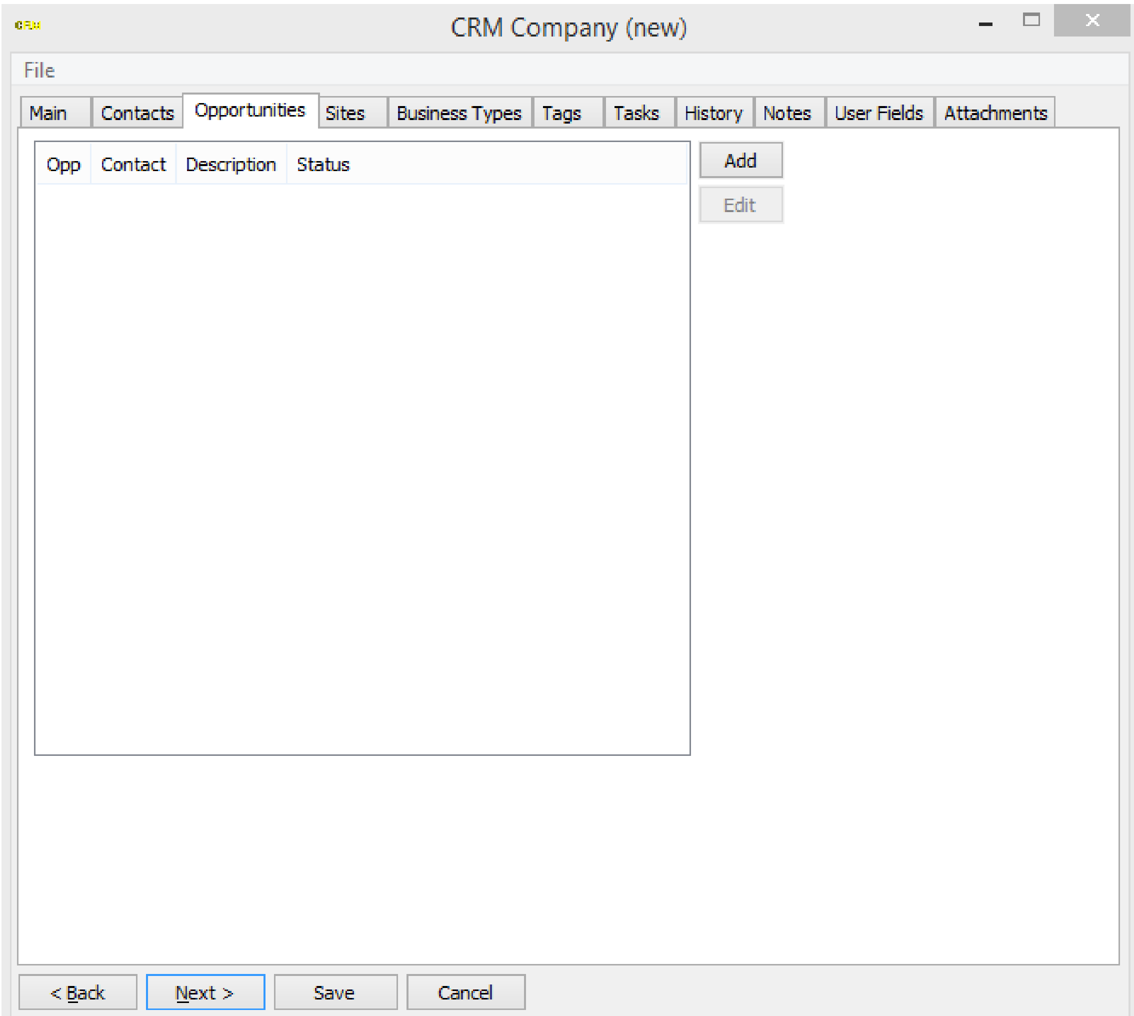
Tags - Tags that are selected on the **Tags** tab will be displayed here.

Contacts Tab



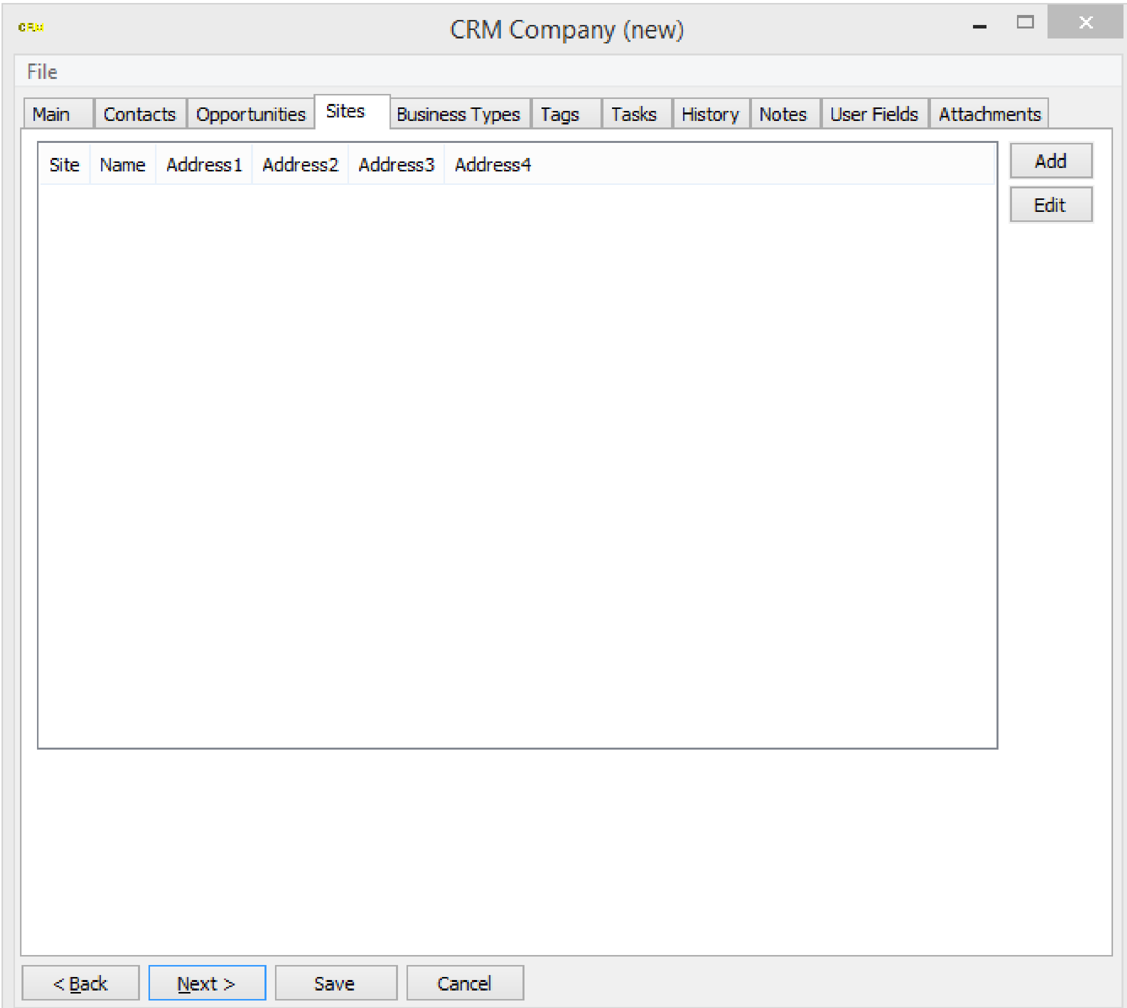
Contacts that have been added to this company will be displayed on this tab. Contacts can either be added from the Contacts tab or from **Create/Edit A Contact.** Click **Add** to create a new contact or **Edit** to edit an existing contact. Setting up contacts will be discussed in further detail in the **How Do I Set Up Contacts?** section.

Opportunities Tab



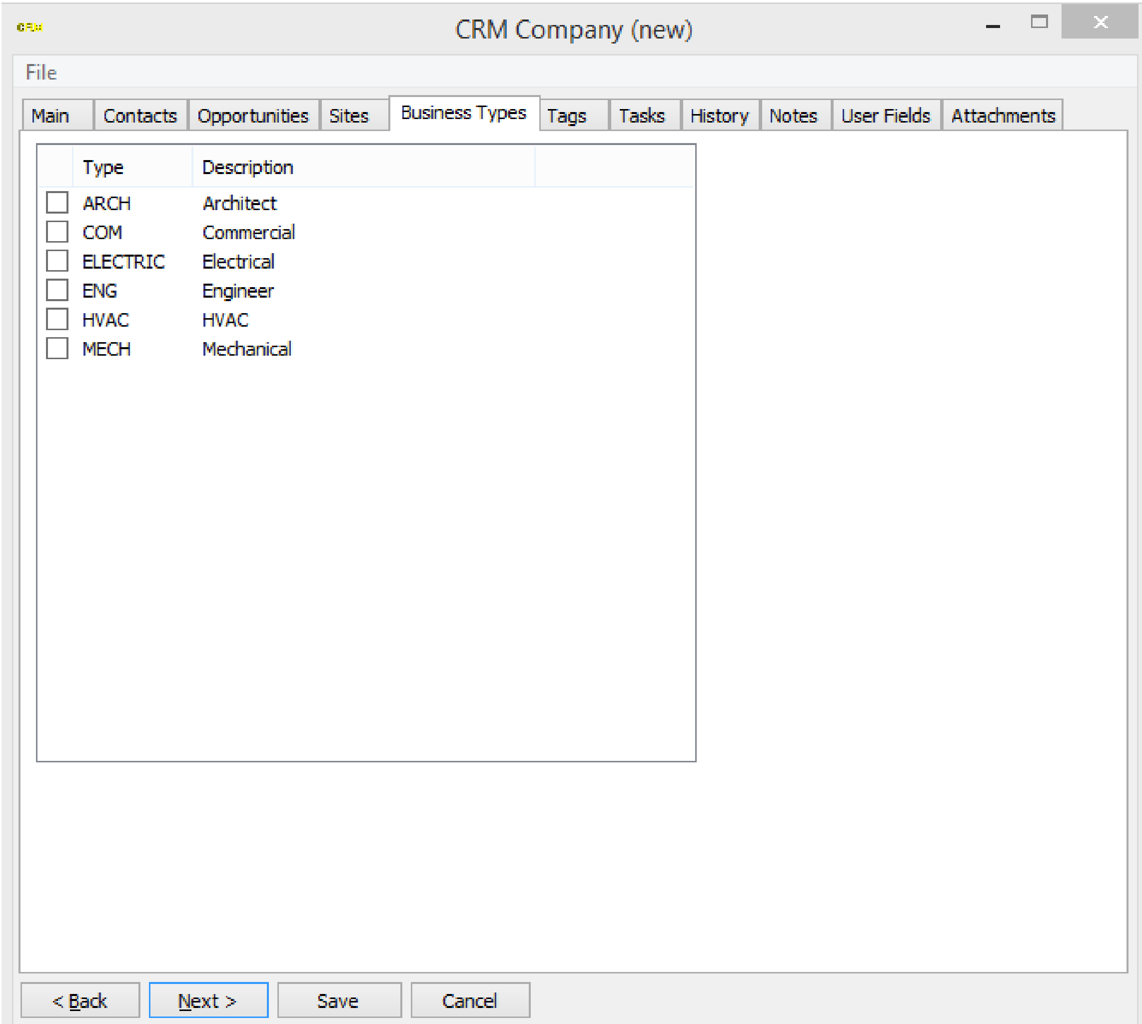
Opportunities that have been added to this company will be displayed on this tab. Opportunities can either be added from the Opportunities tab or from **Create/Edit An Opportunity.** Click **Add** to create a new opportunity or **Edit** to edit an existing opportunity. Setting up opportunities will be discussed in further detail in the the **How Do I Set Up Opportunities?** section.

Sites Tab



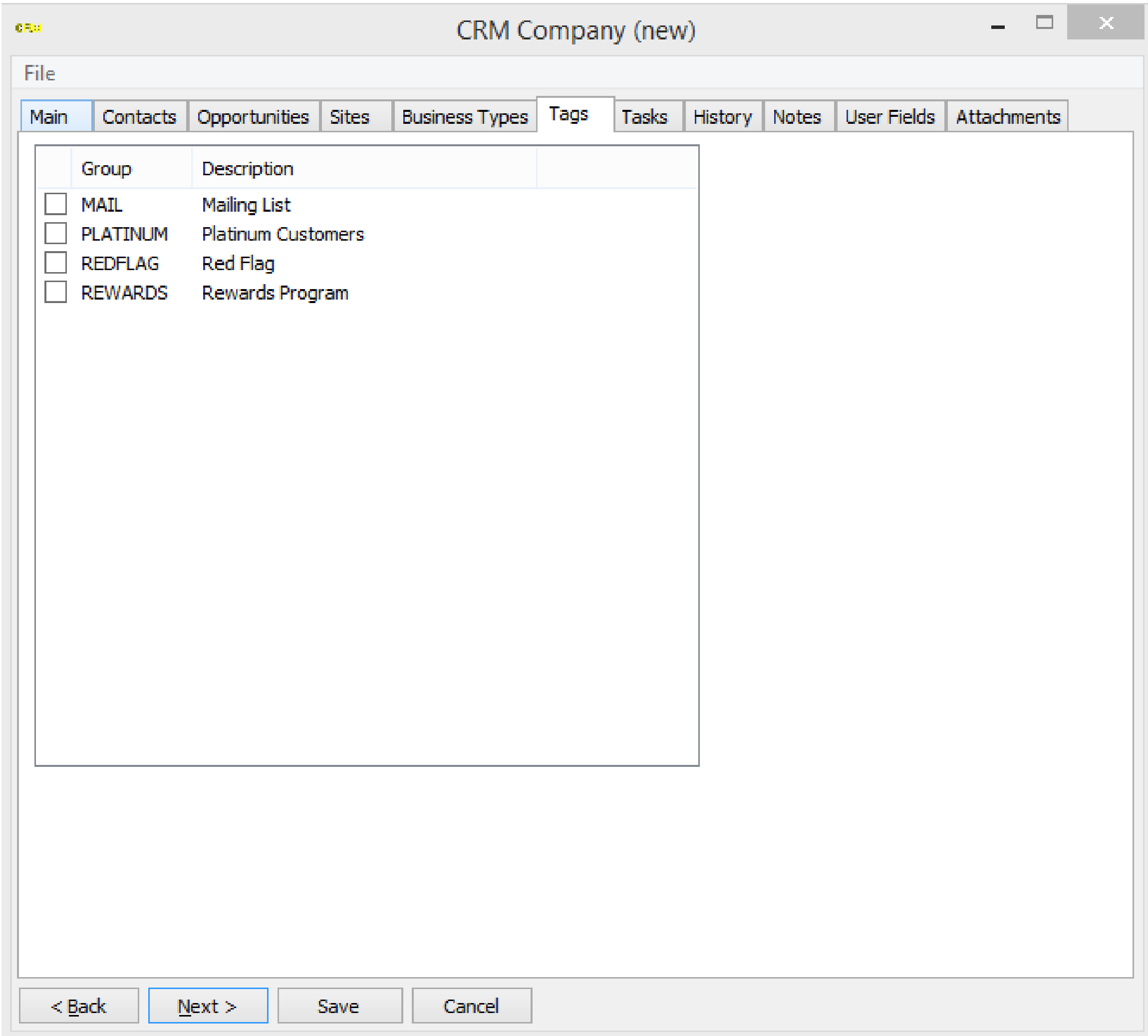
Sites that have been added to this company will be displayed on this tab. Click **Add** to create a new site or **Edit** to edit an existing site. Sites added here will also be added to the Service Management module.

Business Types Tab



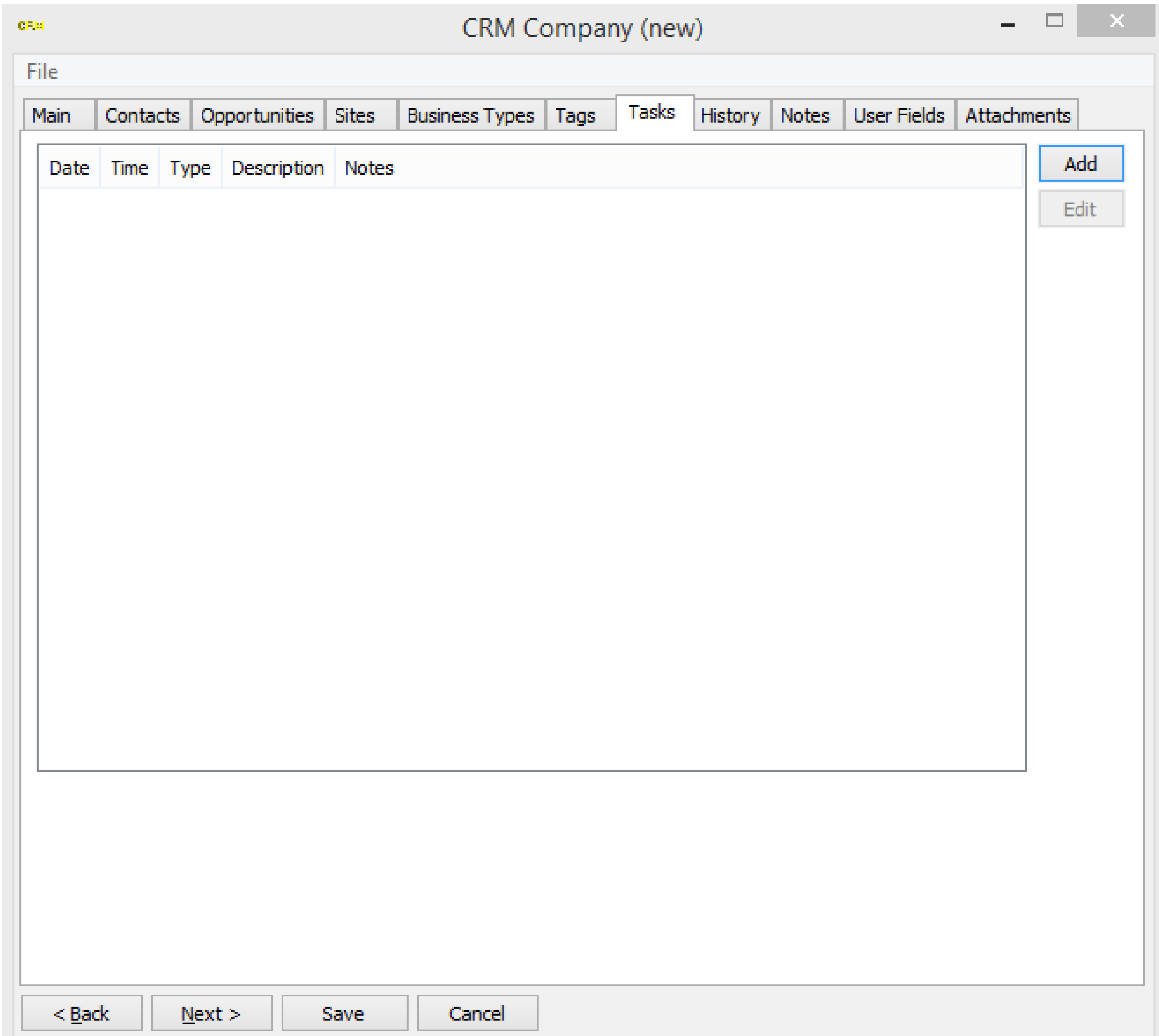
Select the company's business type(s). The business types selected on this tab will appear in the **Business Types** field on the **Main** tab. The Business Types that display on this tab are created in **Business Type Maintenance.**

Tags Tab



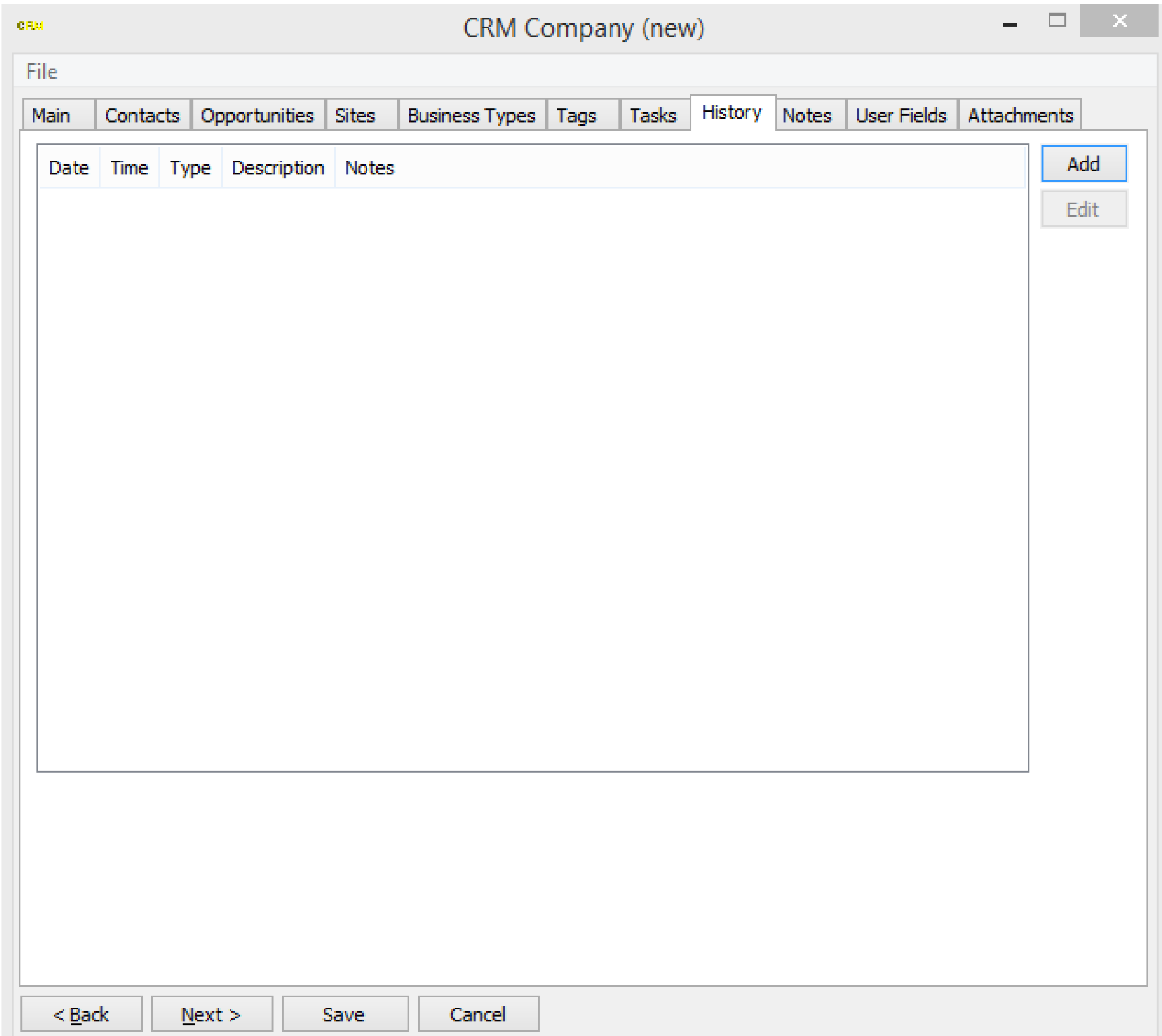
Select the tags that you would like to use to track the company. The tags selected on this tab will appear in the **Tags** field on the **Main** tab. The tags that display on this tab are created in **Tag Maintenance.**

Tasks Tab



Tasks that have been added to this company will be displayed on this tab. Tasks can either be added from the Tasks tab or from the **Tasks** menu**.** Click **Add** to create a new task or **Edit** to edit an existing task. Setting up tasks will be discussed in further detail in the the **How Do I Set Up Tasks?** section.

History Tab



Tasks for this company that have been marked as completed will be displayed on this tab. Once a task has been completed it will be moved from the **Tasks** tab to the **History** tab. Click **Add** to create a new task or **Edit** to edit an existing task. Setting up tasks will be discussed in further detail in the **How Do I Set Up Tasks?** section.

Notes Tab

This tab allows you to enter any notes you may want to track concerning this customer.

User Fields Tab

The user fields tab allows you to enter information into the user-defined fields for companies that were setup in the Parameters for CRM. This tab only appears if you have created at least one user field under **Configure/System Parameters/CRM Parameters**.

Attachments Tab

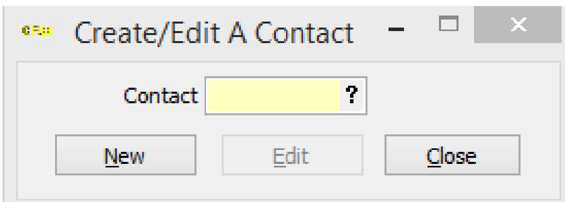
The Attachments tab gives you the option to add files, scan documents, and drag existing saved documentation into the company file. This tab only appears if you have created at least one CRM attachment folder under **Configure/System Parameters/CRM Parameters**.

For instructions on adding attachments, refer to "How Do I Work With Attachments" in the "System Setup" chapter of your manual.

Click on **Save** to save your entry or **Cancel** to exit the screen without saving your changes.

1.4.2 How Do I Set Up Contacts in ComputerEase?

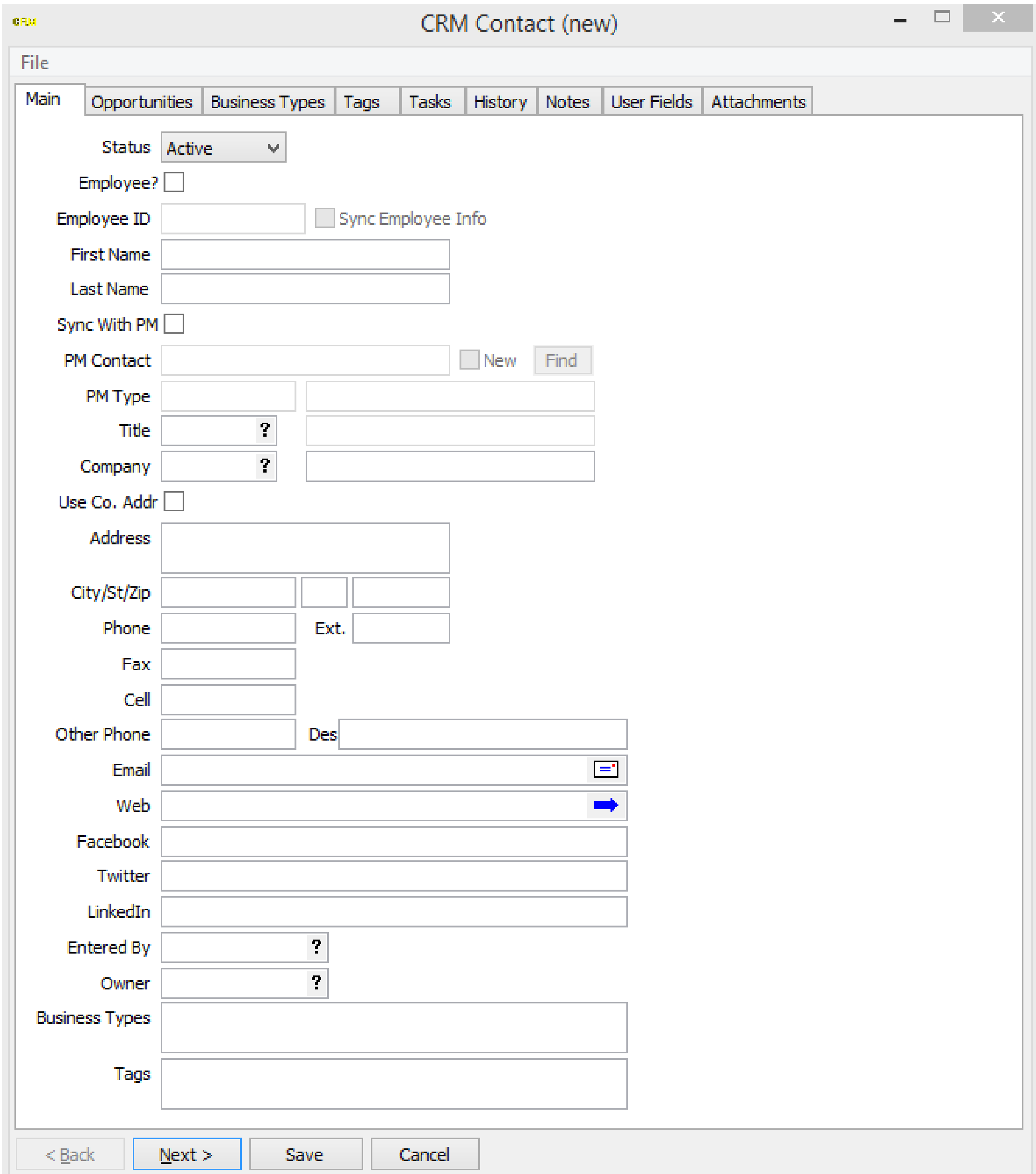
Select **CRM / Create/Edit A Contact**



Contact - Enter or choose the contact number and click **Edit** to edit an existing contact. Leave blank and click **New** to add a new contact.

Contacts can also be added and edited from the **Contacts** tab of **Create/Edit A Company.**

Main Tab



Status - The system defaults to Active, but you may also select Inactive. Active means the contact is currently in use and Inactive will hold the entry for possible future reference.

Employee - Select this option if the contact is an internal employee of your company.

Employee ID - This field will only be active if the **Employee** checkbox is selected. Enter or choose the Employee ID. Selecting **Sync Employee Info** will sync the employee information in the CRM module with the employee information in the Payroll module.

First Name - Enter the contact's first name.

Last Name - Enter the contact's last name.

Sync With PM - Select this option if you want to sync this contact with an existing contact in the Project Management module. If you are adding a new contact, the contact will be added to the Project Management module as well as the CRM module.

PM Contact - This field will only be active if the **Sync With PM** checkbox is selected. Enter or choose the Project Management contact. You can also click **Find** to search for the contact information stored in the Project Management module. Select the **New** checkbox if this a new contact that you would like to add to the Project Management module.

PM Type - This field will also only be active if the **Sync With PM** checkbox is selected. Enter or choose the Project Management contact type.

Title - Enter or choose the contact's title. The titles that are available here are set up in **Title Maintenance.**

Company - Enter or choose the contact's company. Selecting a company that has been set up in the CRM module will add this contact to the **Contacts** tab of **Create/Edit A Company** for that company.

Use Co. Addr - Select this option if you want to populate the address and phone fields with the information contained in the company record.

Address - Enter the contact's address.

City - Enter the contact's city.

State - Enter the contact's two character state postal abbreviation.

Zip - Enter the contact's zip code.

Phone - Enter the contact's phone number.

Fax - Enter the contact's fax number.

Cell - Enter the contact's cell phone number.

Other Phone - Enter an additional phone number for the contact and a description.

Email - Enter the contact's email address. If you select the stamped envelope icon after information is entered in this field, ComputerEase will open a new email message to this address.

Web - Enter the contact's website address. If you select the arrow icon after information is entered in this field, ComputerEase will open this website in a browser window.

Facebook - Enter the address to the contact's Facebook profile.

Twitter - Enter the address to the contact's Twitter profile.

LinkedIn - Enter the address to the contact's LinkedIn profile.

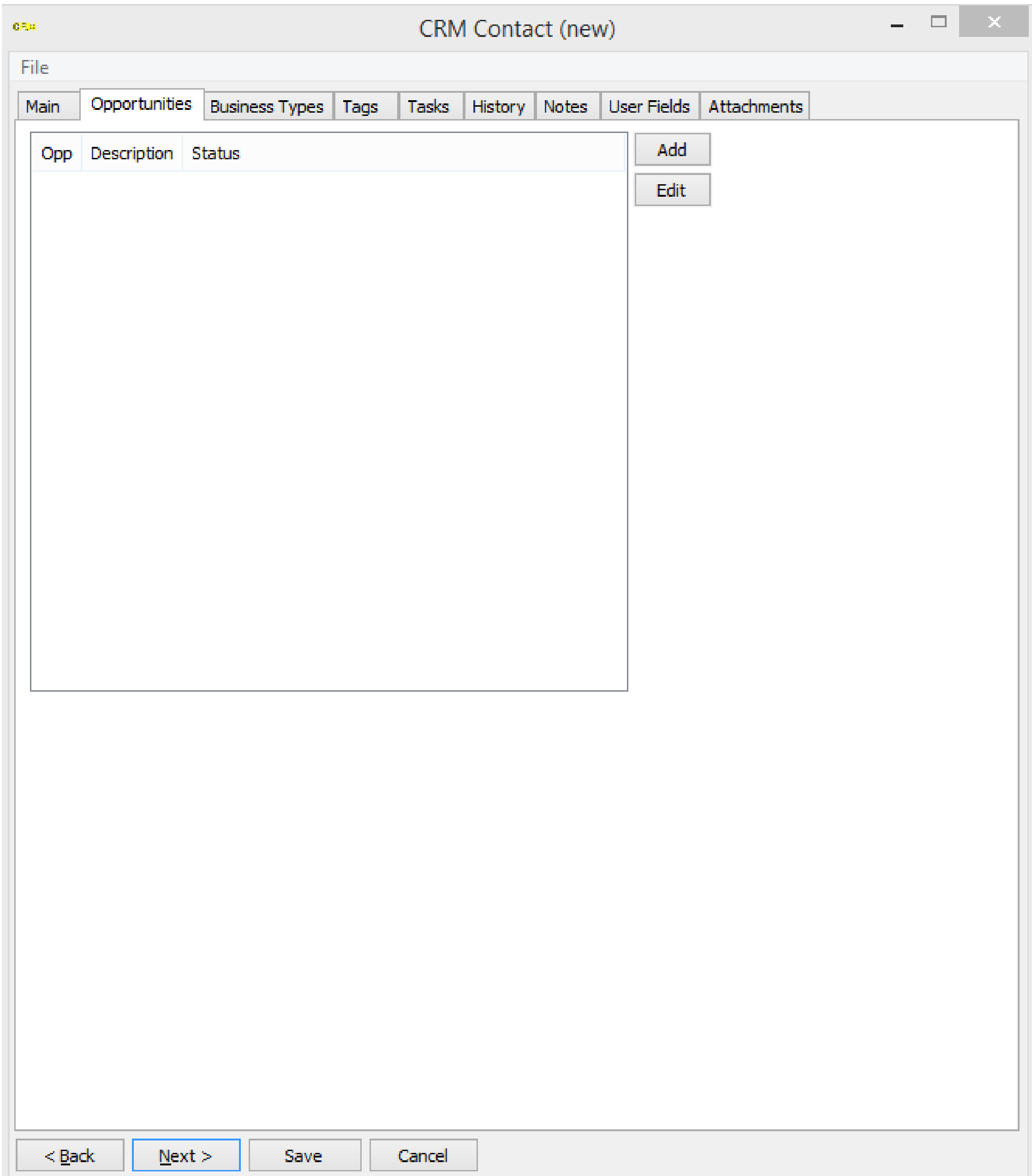
Entered By - Enter or choose the user that entered this contact. This field defaults to the logged in user.

Owner - Enter or choose the owner of this contact. This field defaults to the logged in user.

Business Types - Business Types that are selected on the **Business Types** tab will be displayed here.

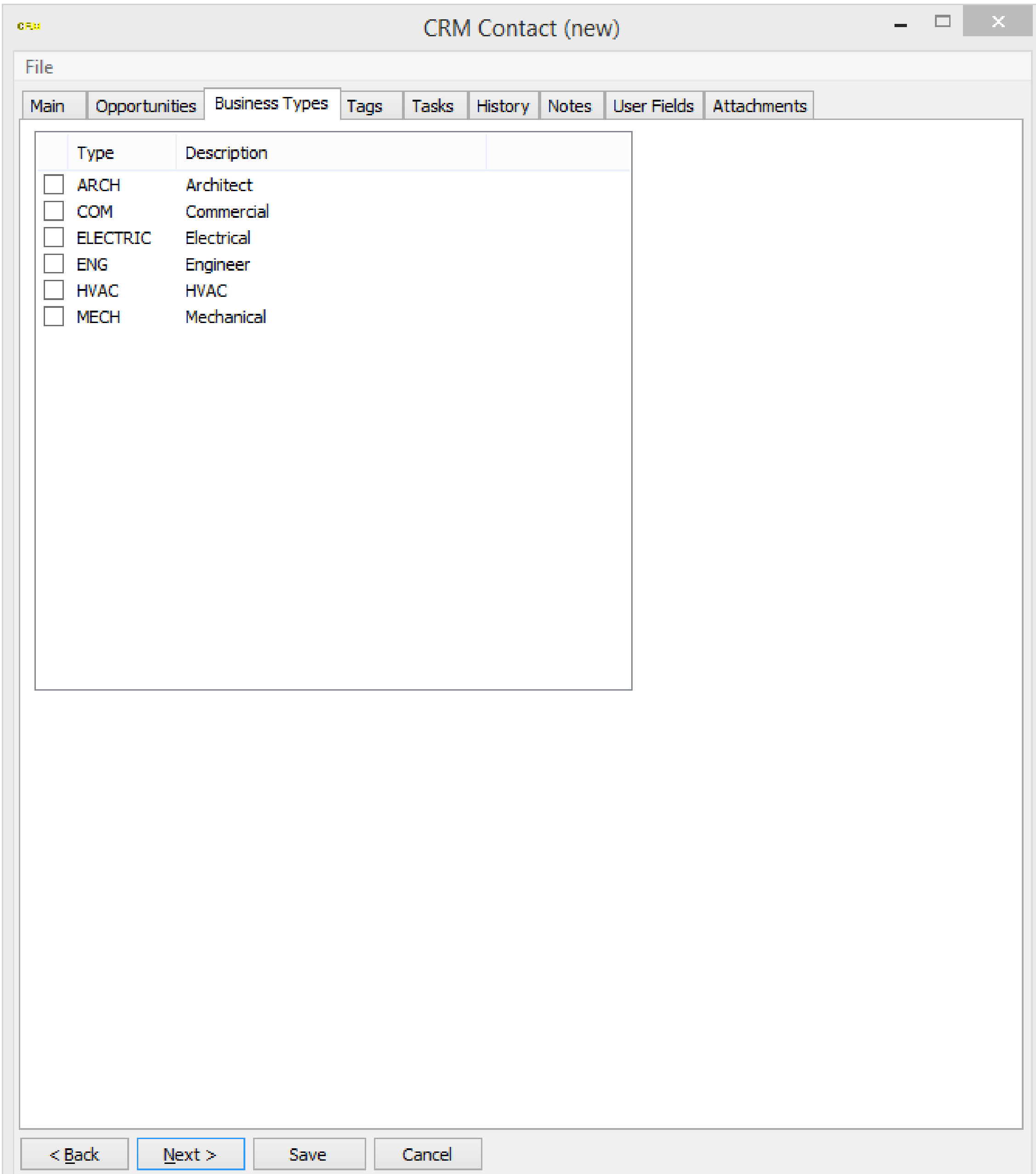
Tags - Tags that are selected on the **Tags** tab will be displayed here.

Opportunities Tab



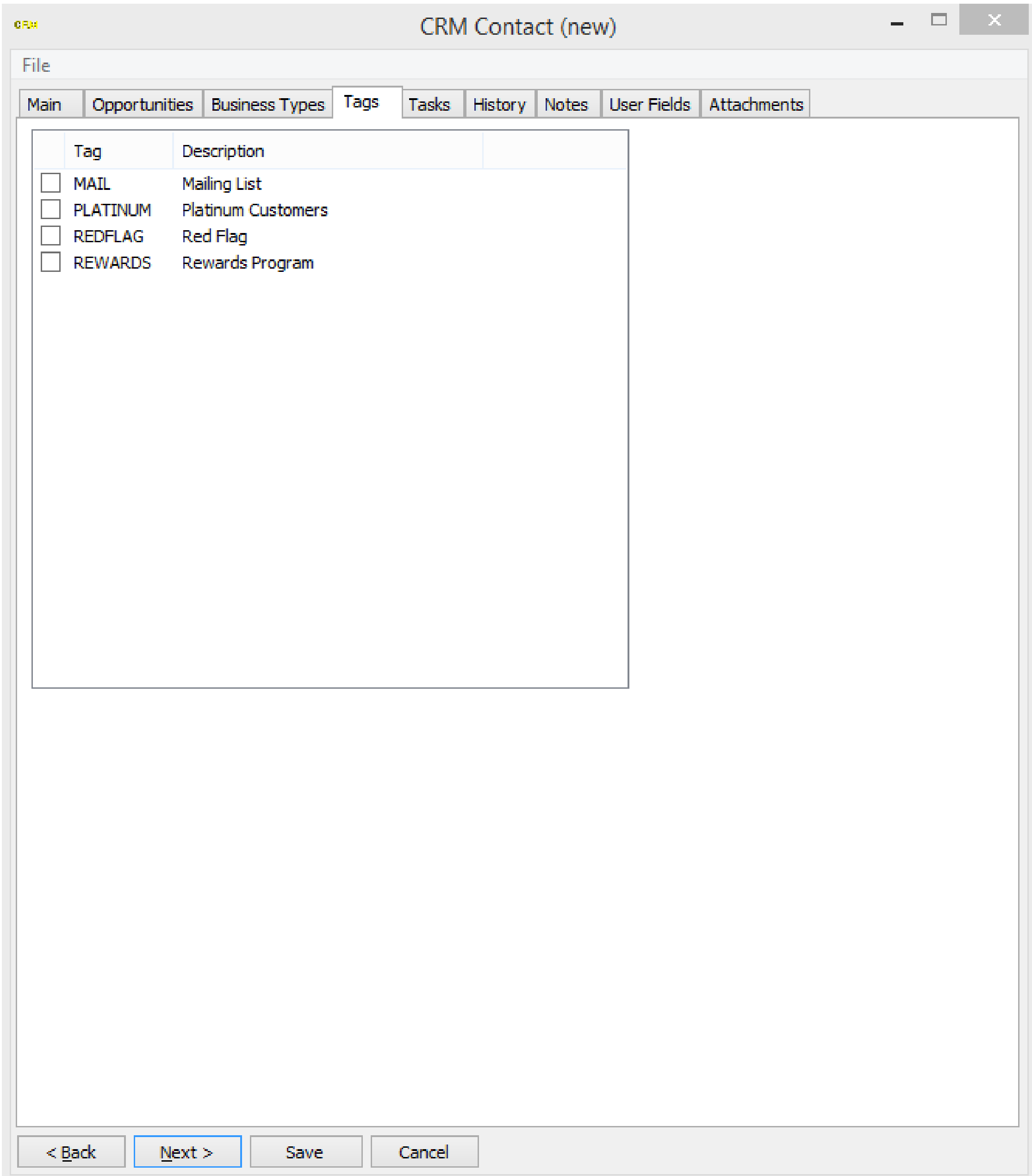
Opportunities that have been added to this contact will be displayed on this tab. Opportunities can either be added from the Opportunities tab or from **Create/Edit An Opportunity.** Click **Add** to create a new opportunity or **Edit** to edit an existing opportunity. Setting up opportunities will be discussed in further detail in the the **How Do I Set Up Opportunities?** section.

Business Types Tab



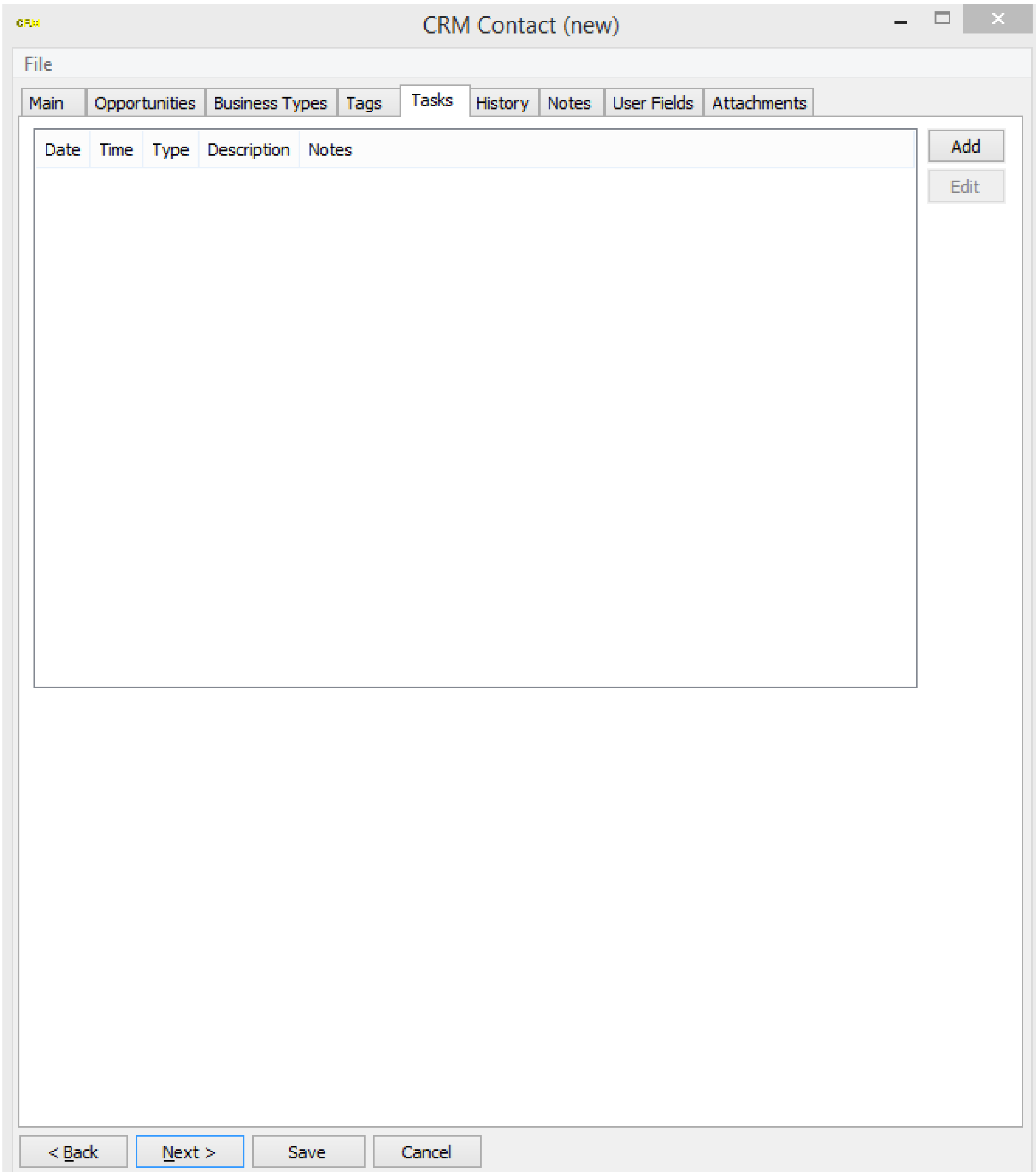
Select the contact's business type(s). The business types selected on this tab will appear in the **Business Types** field on the **Main** tab. The business types that display on this tab are created in **Business Type Maintenance.**

Tags Tab



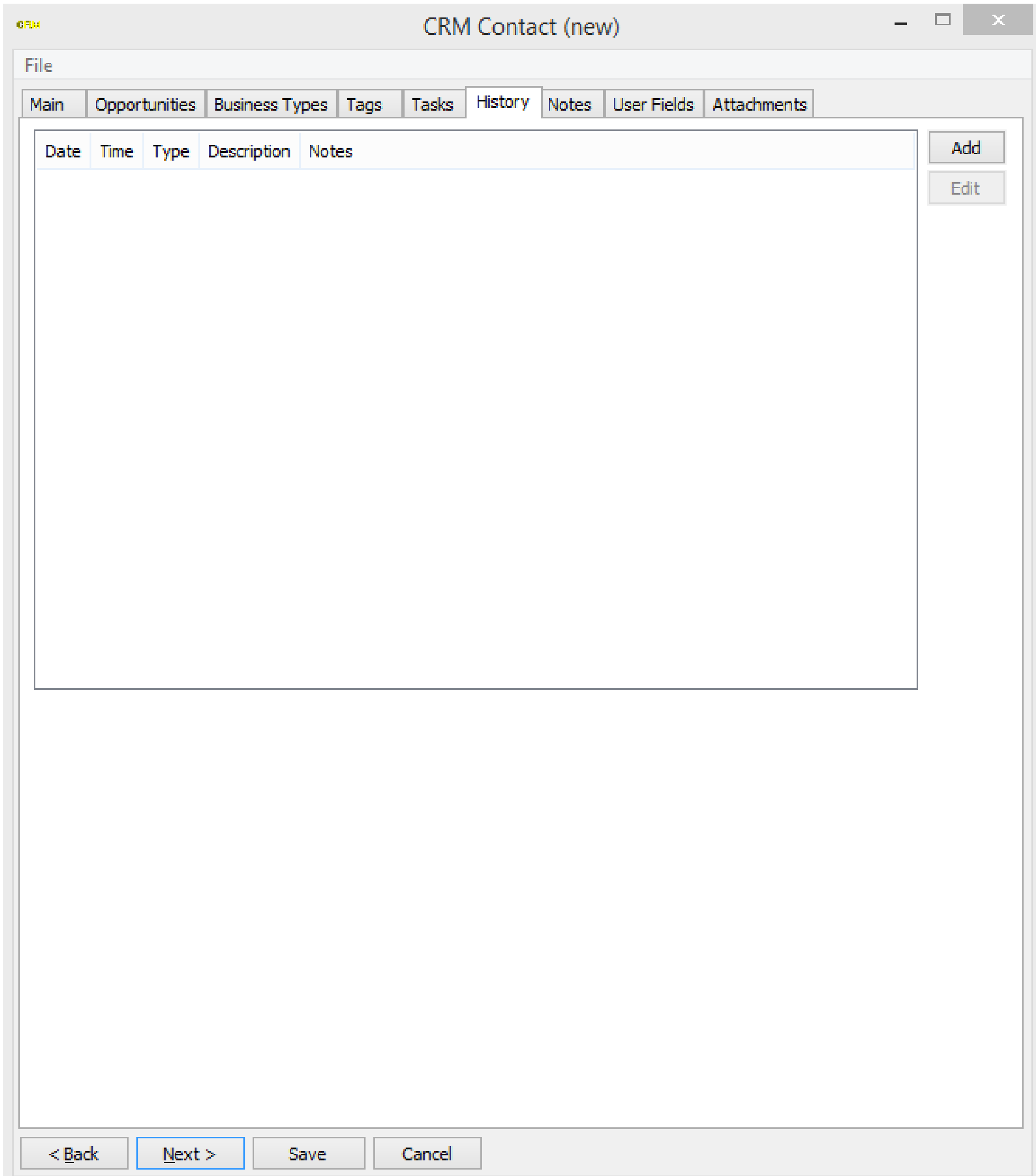
Select the tags that you would like to use to track the contact. The tags selected on this tab will appear in the **Tags** field on the **Main** tab. The tags that display on this tab are created in **Tag Maintenance.**

Tasks Tab



Tasks that have been added to this contact will be displayed on this tab. Tasks can either be added from the Tasks tab or from the **Tasks** menu**.** Click **Add** to create a new task or **Edit** to edit an existing task. Setting up tasks will be discussed in further detail in the the **How Do I Set Up Tasks?** section.

History Tab



Tasks for this contact that have been marked as completed will be displayed on this tab. Once a task has been completed it will be moved from the **Tasks** tab to the **History** tab. Click **Add** to create a new task or **Edit** to edit an existing task. Setting up tasks will be discussed in further detail in the **How Do I Set Up Tasks?** section.

Notes Tab

This tab allows you to enter any notes you may want to track concerning this contact.

User Fields Tab

The user fields tab allows you to enter information into the user-defined fields for contacts that were setup in the Parameters for CRM. This tab only appears if you have created at least one user field under **Configure/System Parameters/CRM Parameters**.

Attachments Tab

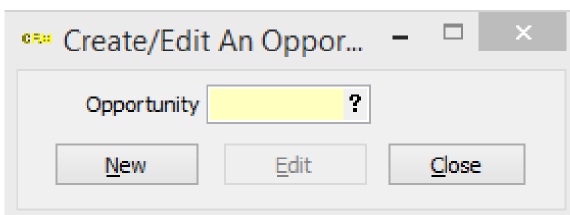
The Attachments tab gives you the option to add files, scan documents, and drag existing saved documentation into the contact file. This tab only appears if you have created at least one CRM attachment folder under **Configure/System Parameters/CRM Parameters**.

For instructions on adding attachments, refer to "How Do I Work With Attachments" in the "System Setup" chapter of your manual.

Click on **Save** to save your entry or **Cancel** to exit the screen without saving your changes.

1.4.3 How Do I Set Up Opportunities in ComputerEase?

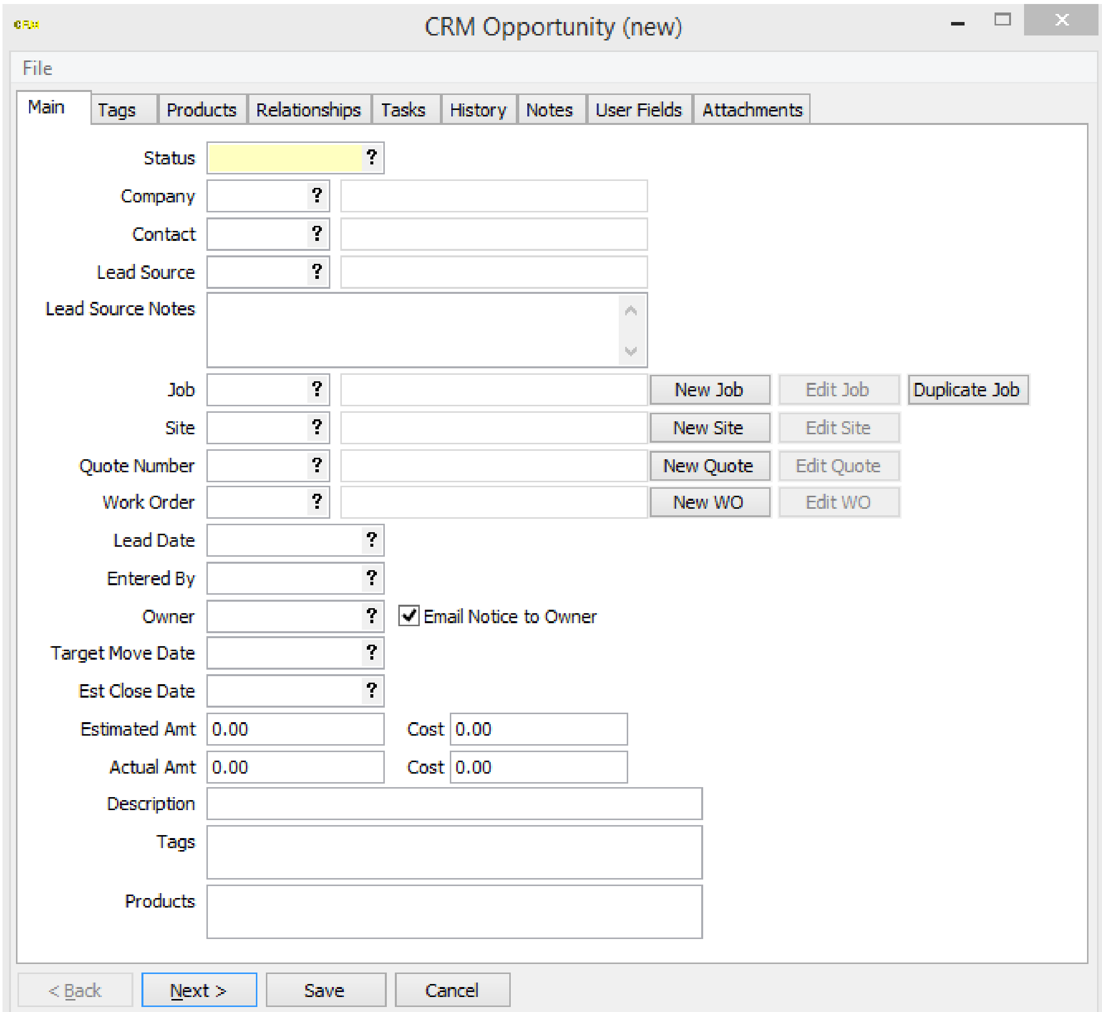
Select **CRM / Create/Edit An Opportunity**



Opportunity - Enter or choose the opportunity number and click **Edit** to edit an existing opportunity. Leave blank and click **New** to add a new opportunity.

Opportunities can also be added and edited from the **Opportunities** tab of **Create/Edit A Company** and **Create/Edit A Contact.**

Main Tab



Status - Enter or choose the status of the opportunity. The statuses that are available here are set up in **Opportunity Status Maintenance.**

Company - Enter or choose the company that the opportunity is for. Selecting a company that has been set up in the CRM module will add this opportunity to the **Opportunities** tab of **Create/Edit A Company.**

Contact - Enter or choose the contact that the opportunity is for. Selecting a contact that has been set up in the CRM module will add this opportunity to the **Opportunities** tab of **Create/ Edit A Contact.**

Lead Source - Enter of choose the lead source. The lead sources that are available here are set up in **Lead Source Maintenance.**

Lead Source Notes - Enter any notes you may have about the lead source.

Job - Enter or choose the job that the opportunity is for. Once you select a job, you may click the **Edit Job** button to edit the job in the Job Costing module. You can also click the **New Job** button to add a new job for the opportunity and to create the job in the Job Costing module at the same time. Clicking **Duplicate Job** will allow you to copy an existing job to a new job.

Site - Enter or choose the site that the opportunity is for. Once you select a site, you may click the **Edit Site** button to edit the site in the Service Management module. You can also click the **New Site** button to add a new site for the opportunity and create the site in the Service Management module at the same time.

Quote Number - Enter or choose the quote number that the opportunity is for. Once you select a quote number, you may click the **Edit Quote** button to edit the quote in the Service Management module. You can also click the **New Quote** button to add a new quote for the opportunity and create the quote in the Service Management module at the same time.

Work Order - Enter or choose the work order that the opportunity is for. Once you select a work order, you may click the **Edit WO** button to edit the work order in the Service Management module. You can also click the **New WO** button to add a new work order for the opportunity and create the work order in the Service Management module at the same time.

Lead Date - Enter or select the date that the lead was received. This field defaults to the current date.

Entered By - Enter or choose the user that entered this opportunity. This field defaults to the logged in user.

Owner - Enter or choose the owner of this opportunity. This field defaults to the logged in user.

Target Move Date - Enter or choose the date targeted to move the opportunity to the next opportunity status.

Est Close Date - Enter or choose the date estimated to close the opportunity.

Estimated Amt and **Cost -** Enter the estimated sales amount and cost.

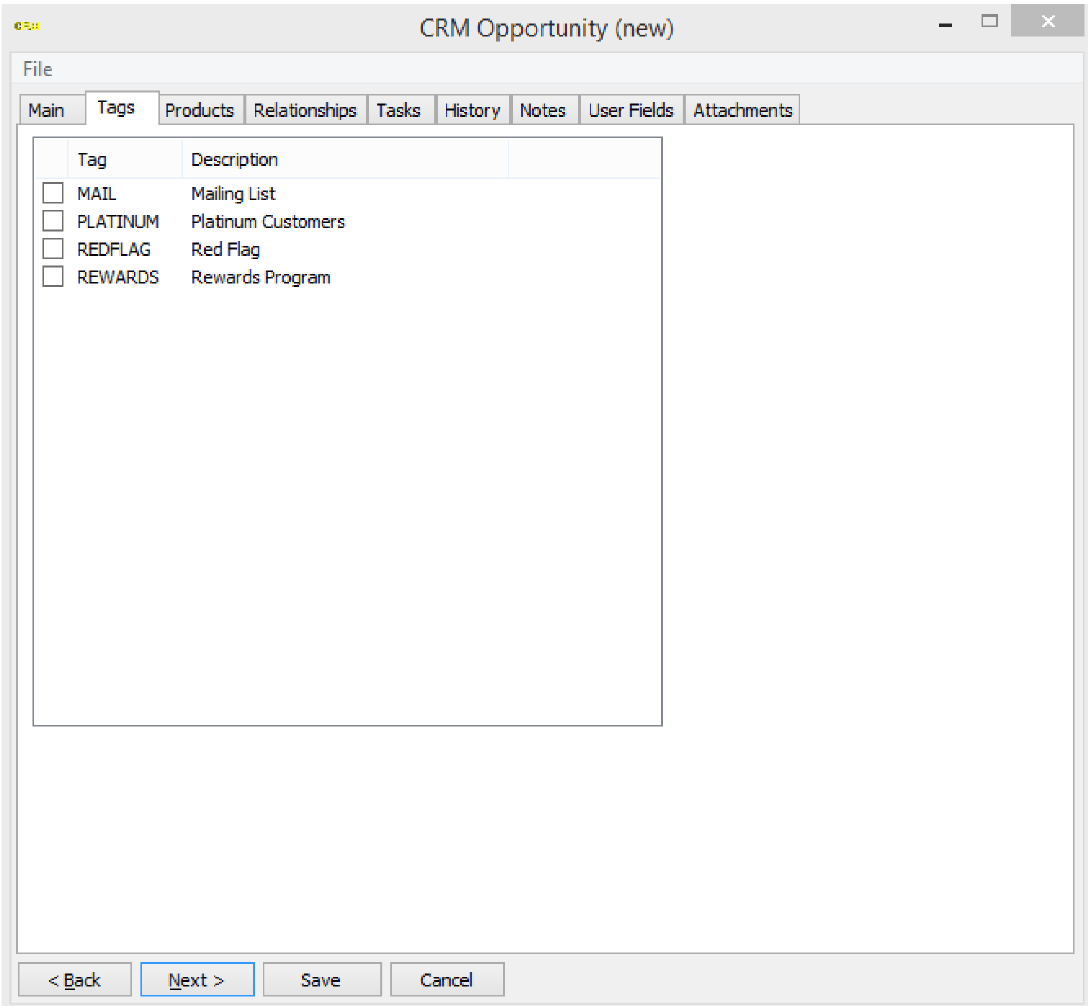
Actual Amt and **Cost -** Enter the actual sales amount and cost.

Description - Enter a description of the opportunity.

Tags - Tags that are selected on the **Tags** tab will be displayed here.

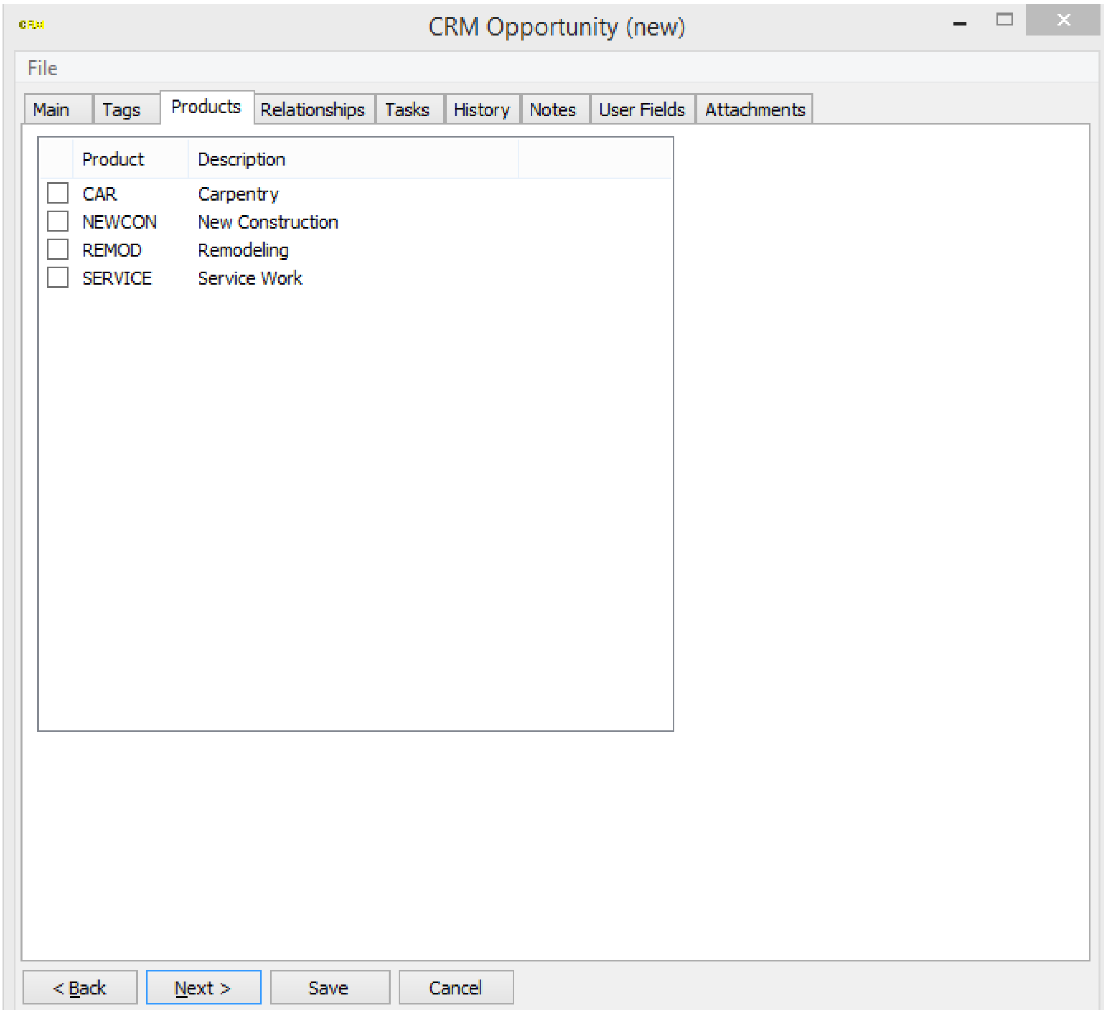
Products - Products that are selected on the **Products** tab will be displayed here.

Tags Tab



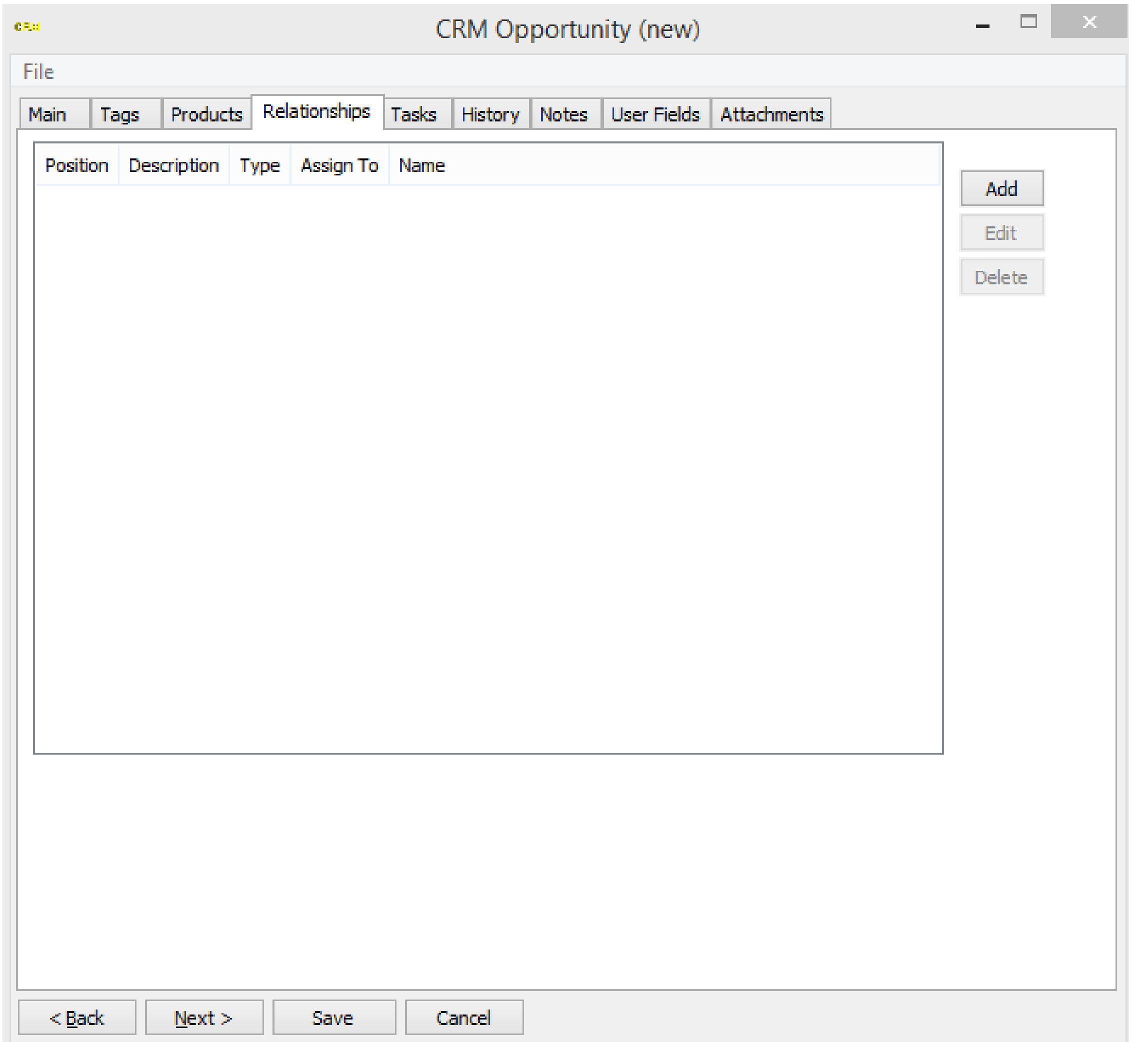
Select the tags that you would like to use to track the opportunity. The tags selected on this tab will appear in the **Tags** field on the **Main** tab. The tags that display on this tab are created in **Tag Maintenance.**

Products Tab

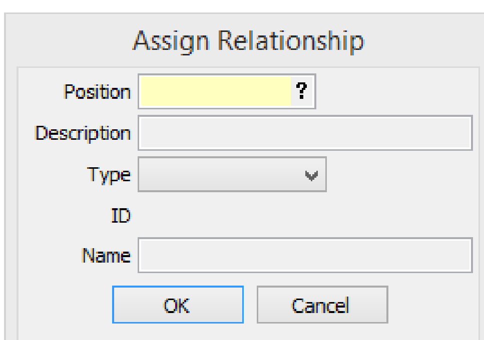


Select the products that the opportunity is for. The products selected on this tab will appear in the **Products** field on the **Main** tab. The products that display on this tab are created in **Product Maintenance.**

Relationships Tab



Relationships can be added, edited, or deleted from an opportunity on this tab. To add a new relationship, click the **Add** button. This will open the **Assign Relationship** screen:



Position - Enter or choose the position of the person that the relationship is with. The positions that are available here are set up in **Position Maintenance.**

Description - This field will automatically populate with a description of the selected position.

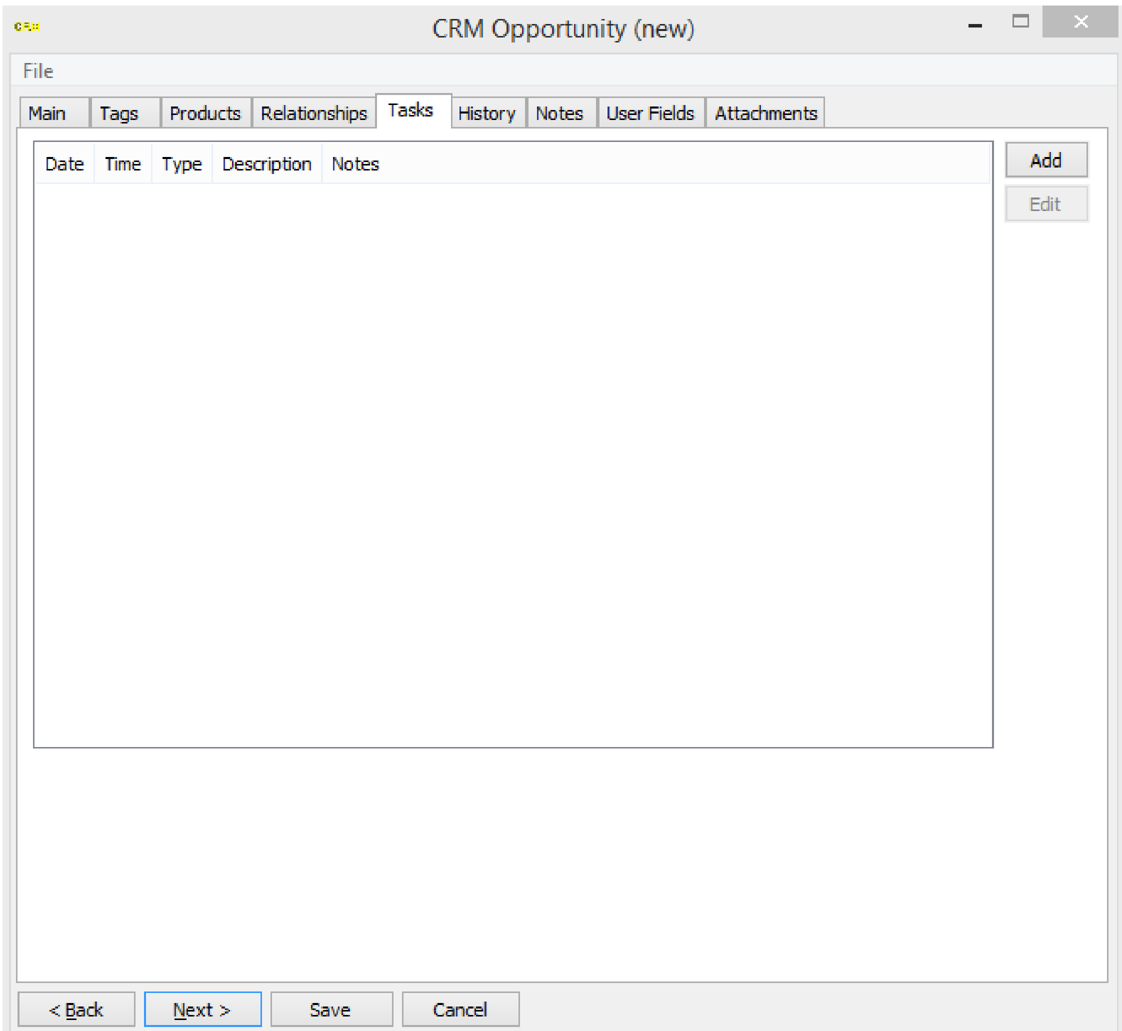
Type - Choose the type of relationship that you are adding. The options are User, Company, or Contact.

ID - Enter or choose the ID of the user, company, or contact that the relationship is with.

Name - This field will automatically populate with the name corresponding to the selected ID.

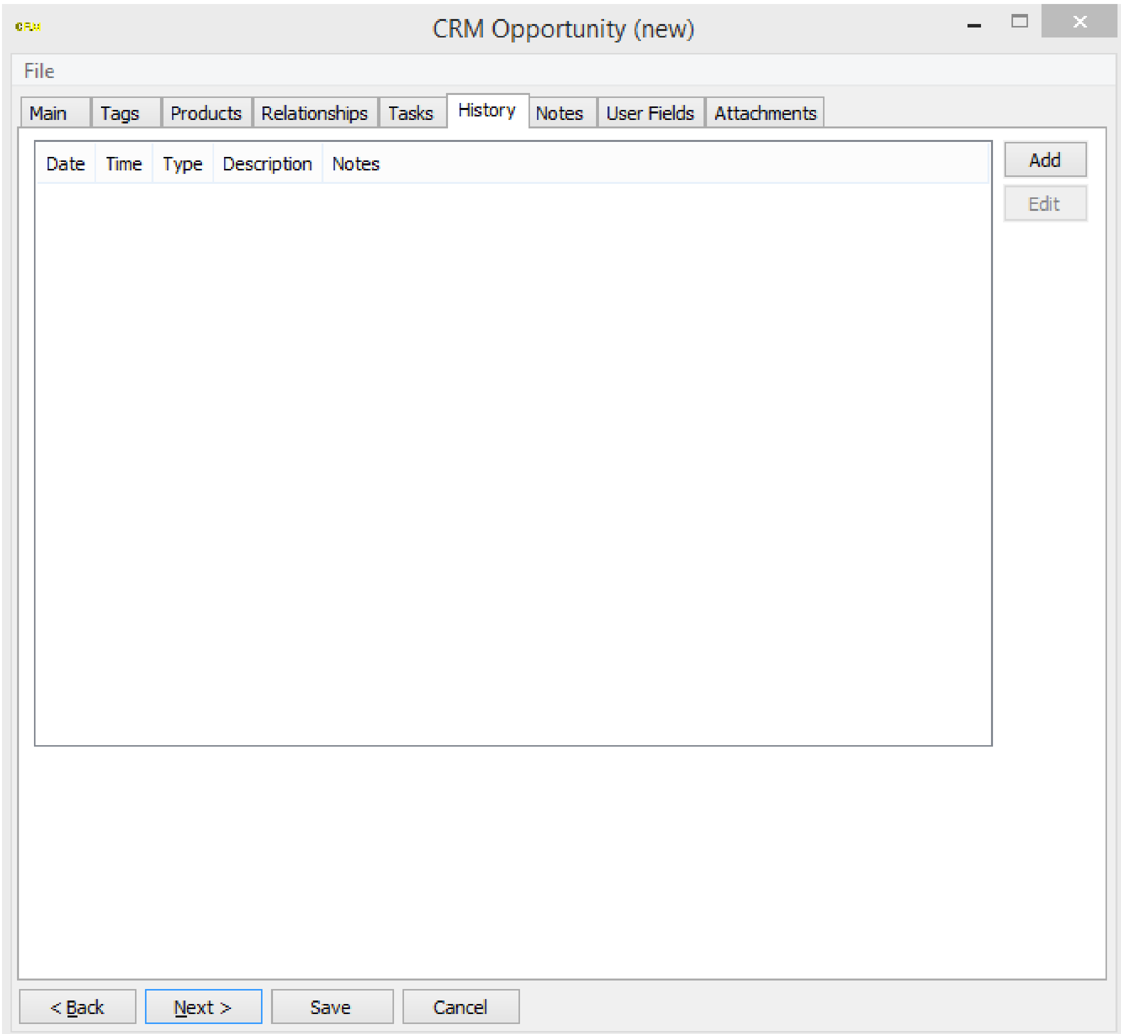
Click on **OK** to add your entry or **Cancel** to exit the screen without saving your changes.

Tasks Tab



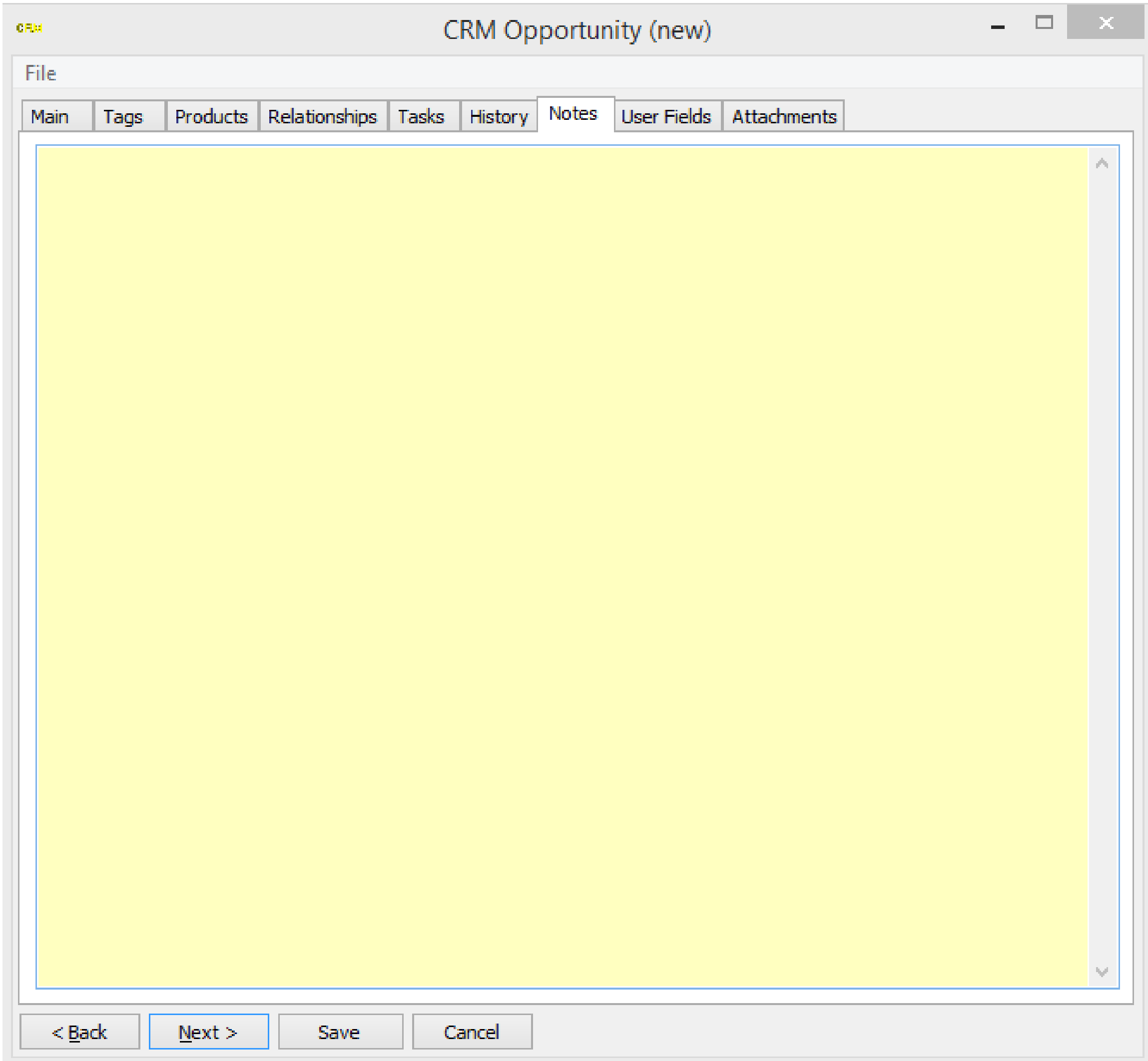
Tasks that have been added to this opportunity will be displayed on this tab. Tasks can either be added from the Tasks tab or from the **Tasks** menu**.** Click **Add** to create a new task or **Edit** to edit an existing task. Setting up tasks will be discussed in further detail in the the **How Do I Set Up Tasks?** section.

History Tab



Tasks for this opportunity that have been marked as completed will be displayed on this tab. Once a task has been completed it will be moved from the **Tasks** tab to the **History** tab. Click **Add** to create a new task or **Edit** to edit an existing task. Setting up tasks will be discussed in further detail in the **How Do I Set Up Tasks?** section.

Notes Tab



This tab allows you to enter any notes you may want to track concerning this opportunity.

User Fields Tab

The user fields tab allows you to enter information into the user-defined fields for opportunities that were setup in the Parameters for CRM. This tab only appears if you have created at least one user field under **Configure/System Parameters/CRM Parameters**.

Attachments Tab

The Attachments tab gives you the option to add files, scan documents, and drag existing saved documentation into the opportunity file. This tab only appears if you have created at least one CRM attachment folder under **Configure/System Parameters/CRM Parameters**.

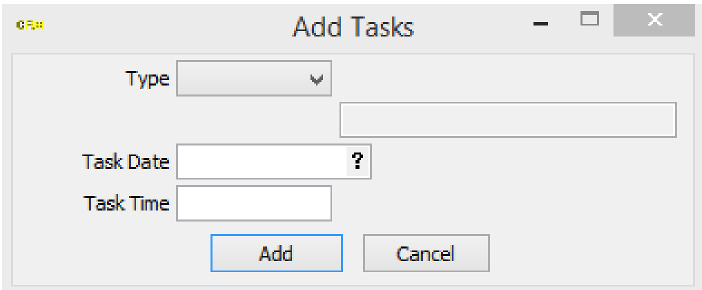
For instructions on adding attachments, refer to "How Do I Work With Attachments" in the "System Setup" chapter of your manual.

Click on **Save** to save your entry or **Cancel** to exit the screen without saving your changes.

1.5 Tasks

1.5.1 How Do I Add Tasks?

Select **CRM / Tasks / Add Tasks**



Type - Select the type of task. The options are Company, Contact, or Opportunity.

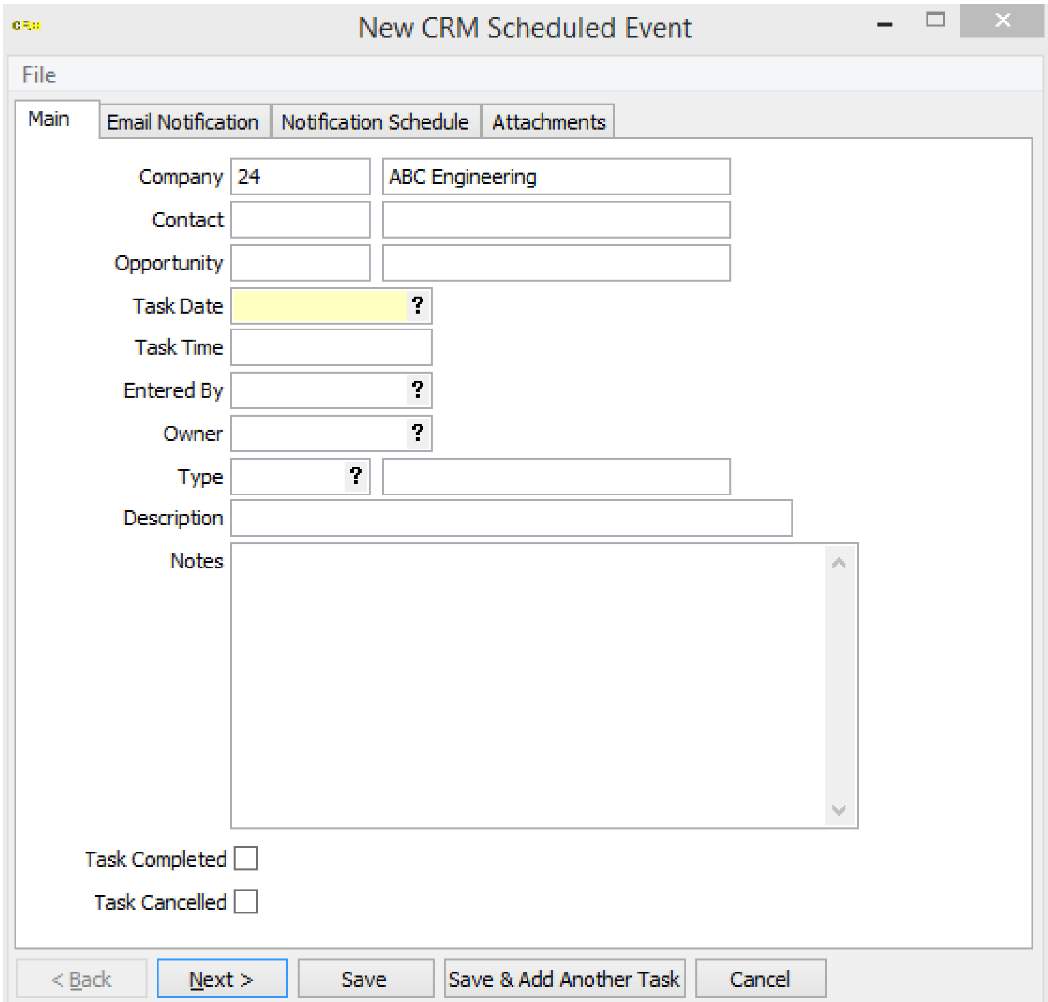
Company/Contact/Opportunity - The Company, Contact, or Opportunity field is determined by the selected type. Enter or choose the Company, Contact, or Opportunity.

Task Date - Enter or choose the date of the task. This field defaults to the current date.

Task Time - Enter the time of the task. This field defaults to the current time.

Click **Add** to continue adding a new task.

Main Tab



Company - This is a non-editable field that will contain the selected company number and name if Company was selected as the task type.

Contact - This is a non-editable field that will contain the selected contact number and name if Contact was selected as the task type.

Opportunity - This is a non-editable field that will contain the selected opportunity number and name if Opportunity was selected as the task type.

Task Date - Enter or choose the date of the task. This field defaults to the current date.

Task Time - Enter the time of the task. This field defaults to the current time.

Entered By - Enter or choose the user that entered this task. This field defaults to the logged in user.

Owner - Enter or choose the owner of this task. This field defaults to the logged in user.

Type - Enter or choose the type of task. The types that are available here are set up in **Task Type Maintenance.**

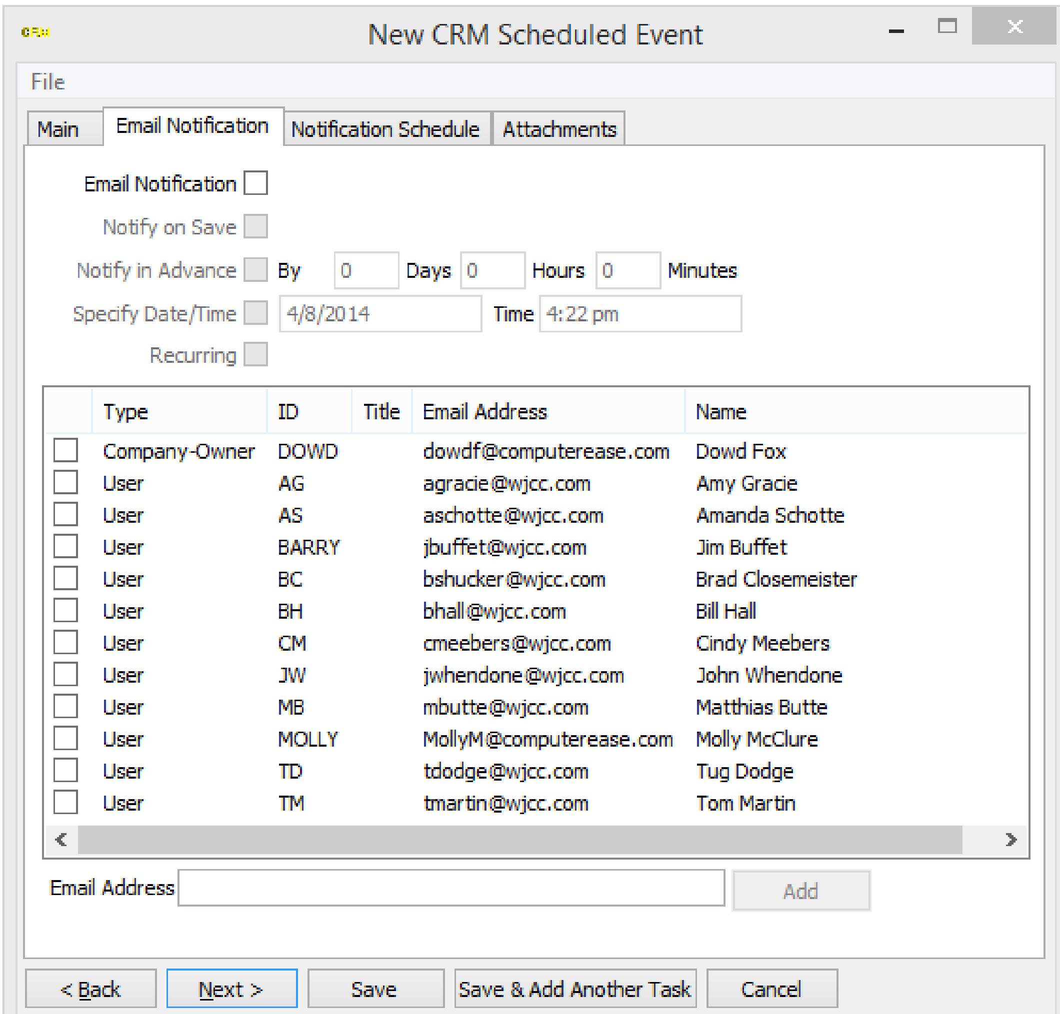
Description - Enter a description of the task.

Notes - Enter notes about the task.

Task Completed - Select this checkbox if the task has been completed.

Task Canceled - Select this checkbox if the task has been canceled.

Email Notification Tab



Email Notification - Select this checkbox to send an email notification.

Notify on Save - Select this checkbox to send the email notification when the task is saved. This checkbox becomes active when the **Email Notification** checkbox is selected.

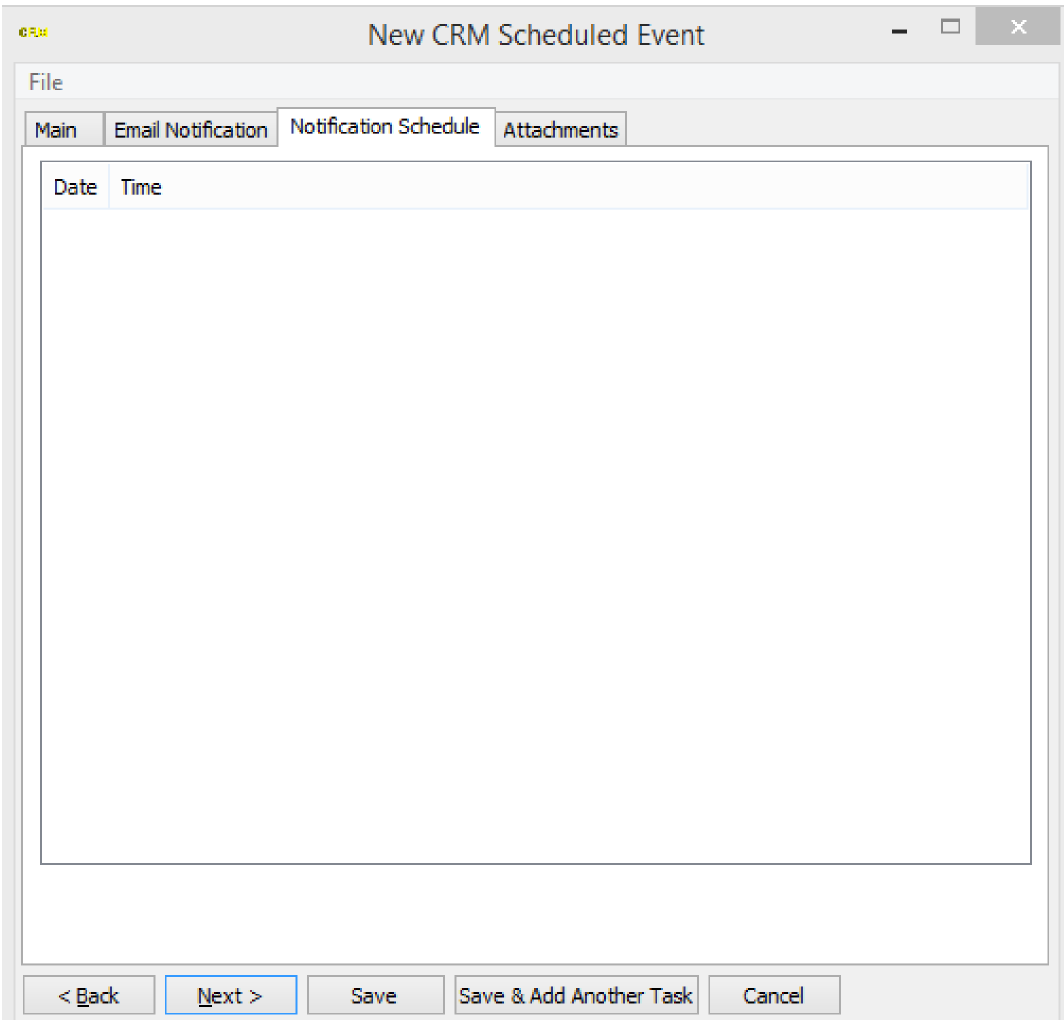
Notify in Advance - Select this checkbox to send the email notification in advance of the task date and time. You can then enter the number of days, hours, or minutes before the task date and time that you want to send the email notification. This checkbox becomes active when the **Email Notification** checkbox is selected.

Specify Date/Time - Select this checkbox to send the email notification at a specified date and time. You can then enter the date and time that you want the email notification to be sent. This checkbox becomes active when the **Email Notification** checkbox is selected.

Recurring - Select this checkbox to send a recurring email notification. You can then select the number of days, hours, minutes, or number of times that you want the email notification to be sent. This checkbox becomes active when the **Notify in Advance** or **Specify Date/ Time** checkbox is selected.

Select the CRM users that to whom you want the email notification to be sent. If you want to send the notification to a user that is not included in the grid, you can enter their email address in the **Email Address** field and click **Add.**

Notification Schedule Tab



The dates and times that the email notifications will be sent will be be listed on this tab.

User Fields Tab

The user fields tab allows you to enter information into the user defined fields for tasks that were setup in the Parameters for CRM. This tab only appears if you have created at least one user field under **Configure/System Parameters/CRM Parameters**.

Attachments Tab

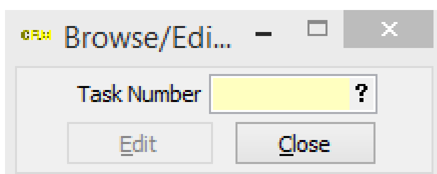
The Attachments tab gives you the option to add files, scan documents, and drag existing saved documentation into the task file. This tab only appears if you have created at least one CRM attachment folder under **Configure/System Parameters/CRM Parameters**.

For instructions on adding attachments, refer to "How Do I Work With Attachments" in the "System Setup" chapter of your manual.

Click on **Save** to save your entry or **Cancel** to exit the screen without saving your changes. On **Save**, the task will be added to the task owner's Outlook calendar. You can also click **Save & Add Another Task** to save the current task and open a new task for the selected Company, Contact, or Opportunity.

1.5.2 How Do I Edit Tasks?

Select **CRM / Tasks / Browse/Edit Tasks**

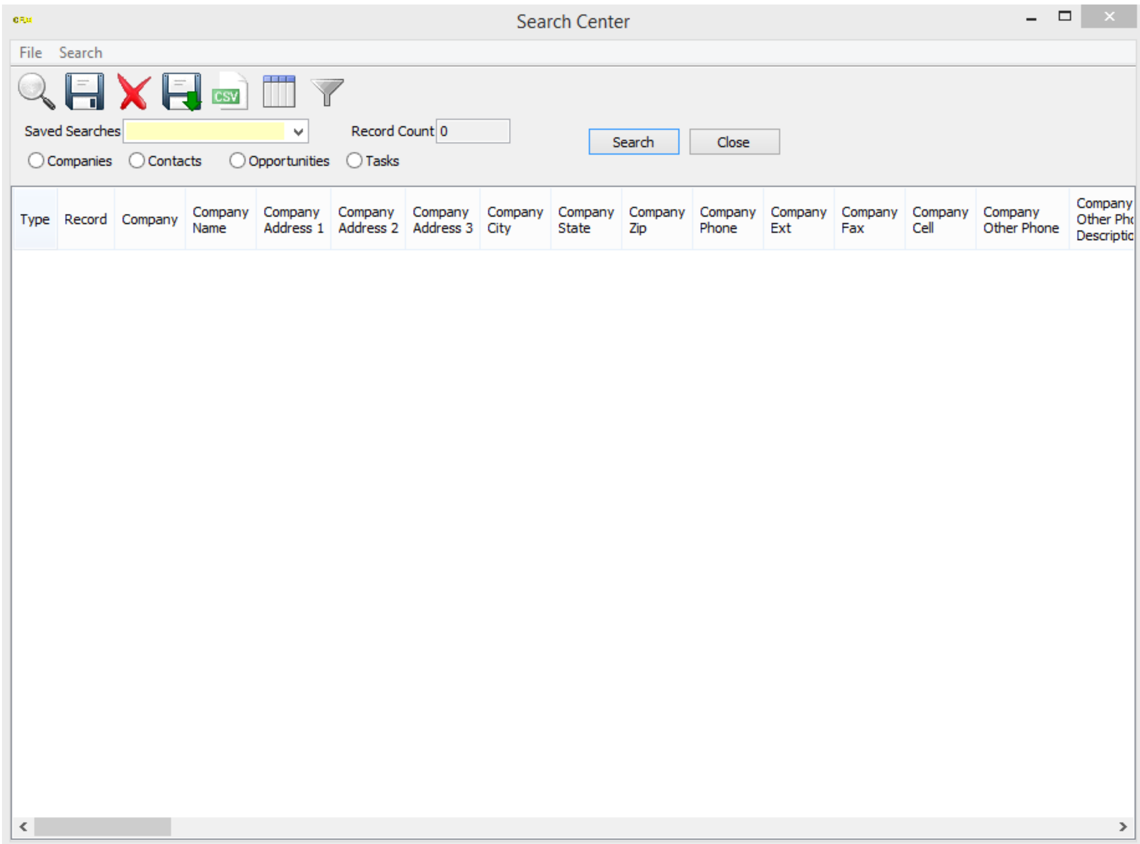


Task Number - Enter or choose the task number and click **Edit** to edit an existing task.

1.6 Search Center

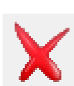
1.6.1 How Do I Use the Search Center

Select **CRM / Search Center**



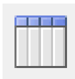
 **New Search -** Click to start a new search.

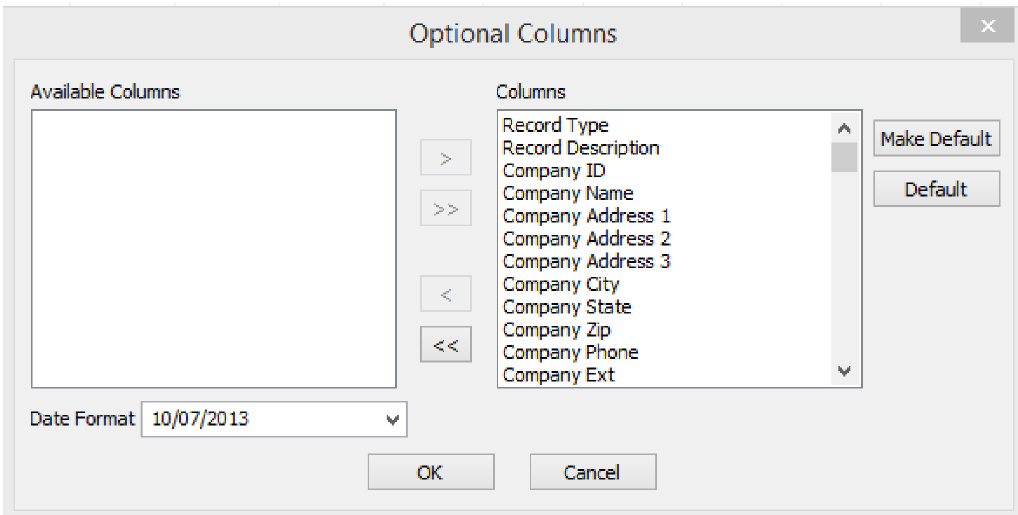
 **Save Search-** Click to save the current search. Once a search is saved it will be available in the **Saved Searches** dropdown list.

 **Delete Search -** Click to delete a saved search. When a search is deleted it will be removed from the **Saved Searches** dropdown list.

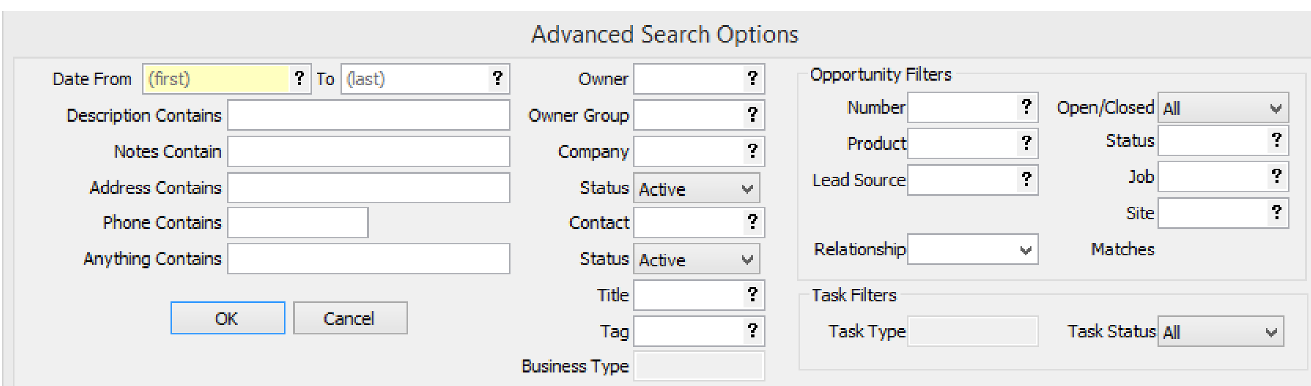
 **Save Search As -** Click to save the current search and be prompted to enter a new Search Name.

Export Results - Click to export the current search results to an Excel spreadsheet. You will be prompted for a file name and location.


Choose Columns - Click to select which columns display in the Search Center. You can set columns for each individual search or you can set your default columns using this option. You can also select your preferred Date Format.




Advanced Search Filters - Click to select additional search options.



Saved Searches - Click the dropdown list to select a previously saved search.

Record Count - The non-editable field contains the number of records that were returned by the search.

Companies - Select to search companies.

Contacts - Select to search contacts.

Opportunities - Select to search opportunities.

Tasks - Select to search tasks.

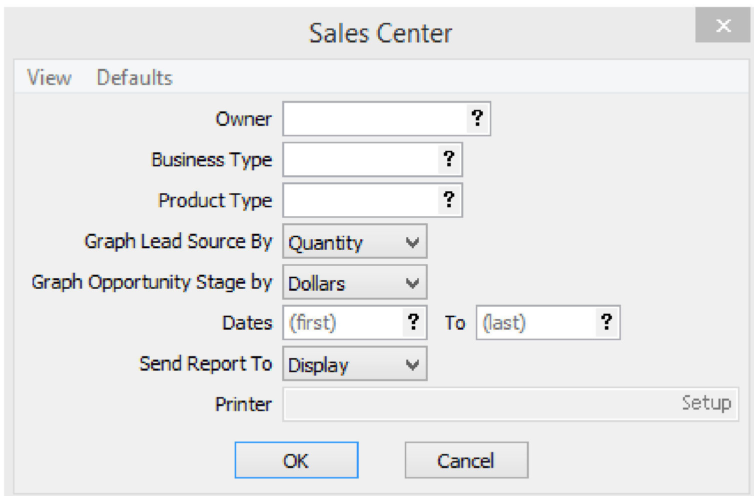
Click **Search** to display search results. Hovering over an item with the mouse in the search results will display the contact information. Double-clicking on the item will open it for viewing or editing.

Click **Close** to close the Search Center.

1.7 Sales Center

1.7.1 How Do I Use the Sales Center?

Select **CRM / Sales Center**



Owner - Enter or choose the owner. This field can also be left blank to show all owners.

Business Type - Enter or choose the business type. This field can also be left blank to show all business types.

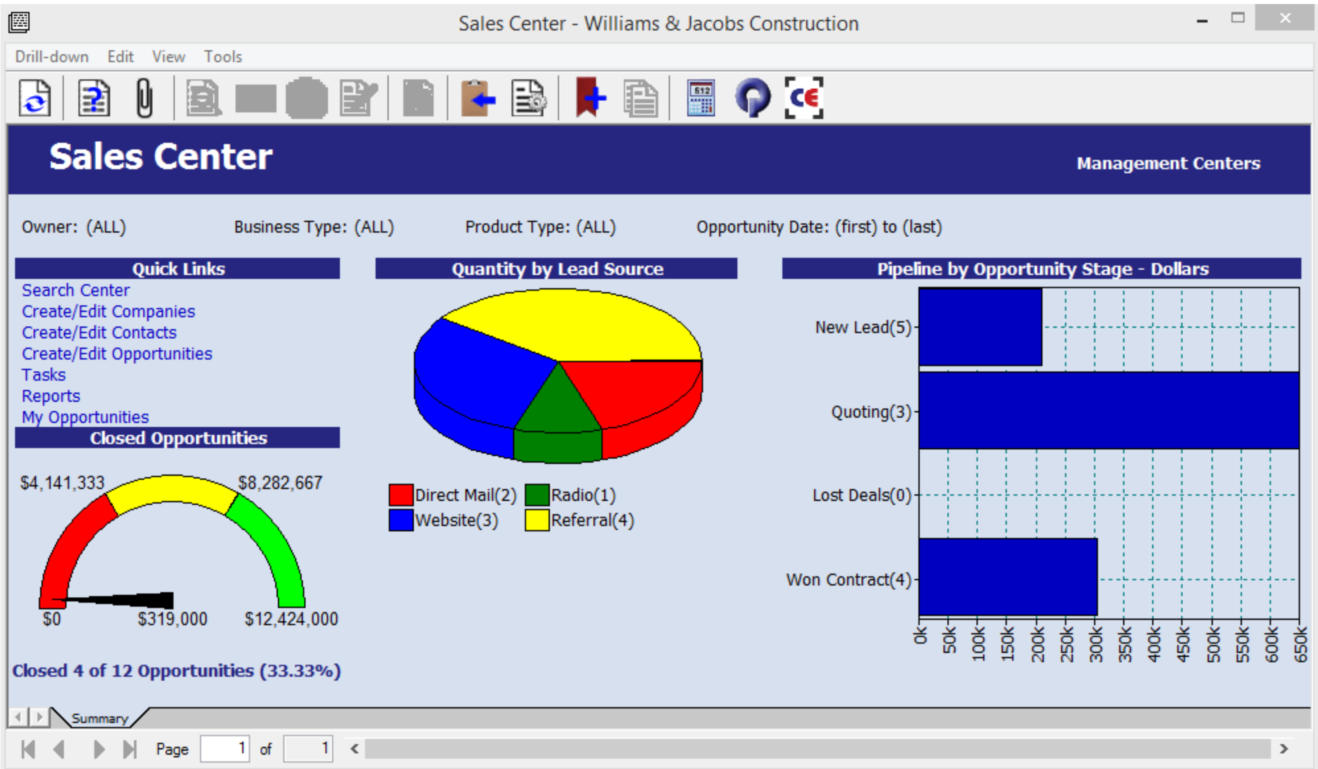
Product Type - Enter or choose the product type. This field can also be left blank to show all product types.

Graph Lead Source By - Select either Quantity or Dollars to use for the Lead Source graph.

Graph Opportunity Stage By - Select either Dollars or Quantity to use for the Opportunity Stage Graph.

Dates - Enter or choose a date range. These fields can also be left blank to show all dates.

Send Report To - Select where you want to send the report. The options are Display, Printer, Email, and Clipboard.



Quick Links - The following CRM items can be opened from the Sales Center:

Search Center - Double-click to open the Search Center.

Create/Edit Companies - Double-click to open Create/Edit Companies.

Create/Edit Contacts - Double-click to open Create/Edit Contacts.

Create/Edit Opportunities - Double-click to open Create/Edit Opportunities.

Tasks - Double-click to open Add Tasks or Browse/Edit Tasks.

Reports - Double-click to open the CRM Company List report.

My Opportunities - Double-click to open the list of opportunities in the Search Center for the selected owner.

Closed Opportunities - This chart shows you where you are with meeting your sales goal for the selected dates.

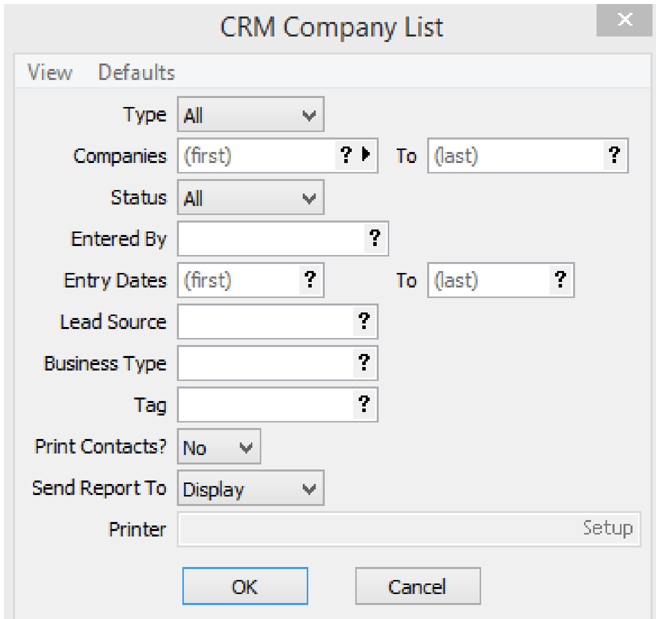
Quantity by Lead Source - This chart shows you which sources are generating the most leads. Double-clicking on a section of the chart will open the list of opportunities in the Search Center.

Pipeline by Opportunity Stage - This chart show you how many opportunities you have in each stage of sales process. Double-clicking on a bar will open the list of opportunities in the Search Center.

1.8 Company Listing

1.8.1 How Do I Run the Company Listing Report?

Select **CRM / Company Listing**



Type - Select a company type. The options are All, Prospect, Customer, Vendor, Internal, or Other.

Companies - Enter or choose a single company or a range of companies.

Status - Select a status. The options are All, Active, or Inactive.

Entered By - Enter or choose the user that entered the company.

Entry Dates - Enter or choose the date range that the companies were entered.

Lead Source - Enter or choose a lead source.

Business Type - Enter or choose a business type.

Tag - Enter or choose a tag.

Print Contacts - Select Yes to include contacts in the report or No to exclude them.

Sent Report To - Select where you want to send the report. The options are Display, Printer, E-Mail, or Clipboard.

Click **OK** to run the report.

CRM Company List

Company	Type	Name & Address	Phone Numbers	Lead Source	Bus.Types	Tags
35	Prospect	Harmanious H&C 8776 Annette Lane Jacksonville, FL 32211	Phone (795) 233-4100			
44	Prospect	ABC Electric 555 Main St Cincinnati, OH 45248				
38	Prospect	Goldmine Pipeline 4533 Happy St. Cincinnati, OH 45211	Phone (513) 255-2500 Web www.goldminepipe.com			
39	Prospect	Lightmyfire Protection 455 Pontius Rd. Cincinnati, OH 45211	Phone (513) 451-8000 Web www.lightmyfire.com			
42	Customer CHURCH	Church Builders 3422 Ebenezer Rd Cincinnati, OH 45247				
45	Customer PANTA Email:	Pantaleone Enterprises, Inc. 2170 NE 51st Street Ste A-21 Cincinnati, OH 45211 johnm@computerease.com	Phone (513) 555-4444 Fax (513) 444-7777 Web computerease.com			
34	Prospect	Arsebad Roofing 3522 Sprite Rd. Columbus, OH 43221	Phone (614) 507-9500			
32	Prospect	Biden & McGovern Concrete 6969 Sailboat Way Houston, OH 45333	Phone (513) 644-3000			
30	Prospect	Moresun Supply 2133 Miami Blvd. Cincinnati, OH 45222	Phone (513) 882-9544 Web www.moresunsupply.com			
29	Prospect	Nailit Supply 524 Nobull Street Cincinnati, OH 45213	Phone (513) 721-5000 Web www.nailit.com			
28	Prospect	Fox & Mattlino 3411 Nolift Blvd. Harrison, OH 34555	Phone (513) 921-8755 Web www.fandm			
26	Prospect	Rivers Plumbing 2311 Copper Road Cincinnati, OH 45212	Phone (513) 582-7361