Fitrix

Affordable, Adaptable ERP Software

# Customer Service Management Training Guide

Version 5.40

# Fitrix
# Customer Relationship Management

## Course Workbook

## Version 5.40
## Revised 07/31/2015

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# Table of Contents

# Chapter 1 – Introduction

Functions within a business organization are often referred to as ‘front-office’ or ‘back-office’ depending upon whether they are ‘customer-facing’ like an inside sales group or a customer support call center, or are more internally- or supplier-oriented like accounting/finance, purchasing or manufacturing. Fitrix ERP Customer Relationship Management or CRM system addresses the former, and includes capabilities that are intended to help ‘customer facing’ departments in the company like sales, marketing and customer service/support do their day-to-day jobs.

The main focus of a CRM system is to help ensure that customer needs are met in a timely and efficient manner, so that customer satisfaction is maintained a high levels throughout the organization and with every customer interaction, and so that the company’s revenue and profitability goals are able to be met or exceeded. By having CRM integrated with an ERP system, it is possible to gain and maintain a ‘360 degree view’ of your company’s customers and to support analysis which helps identify your most important and profitable customers, as well as your less profitable and more costly ones.

The Fitrix Customer Relationship Management module is designed to meet the most critical needs of the three main ‘front office’ constituents: sales, marketing and service/support personnel. Since companies often vary greatly as to how these operations are organized, all of Fitrix CRM’s functions within each of these areas may or may not be utilized by your company, or might be implemented in a ‘hybrid’ manner to best meet your business objectives. Certain functions like Activity Management might be used by all users in all of these departments, or just those in one or two.

There are sophisticated applications that are designed to be ‘best in class’ individual or suite-based CRM solutions that include more specialized capabilities than Fitrix CRM has at this time. Fitrix CRM is designed to meet the core CRM needs of the typical discrete manufacturer or wholesale distributor, and to provide close integration between these core CRM capabilities and the other ERP functionality provided within the Fitrix software suite. With this CRM/ERP integration, a ‘360 degree view’ of your customers and their individual impact on your operations and profitability can be accurately measured and optimized over time.

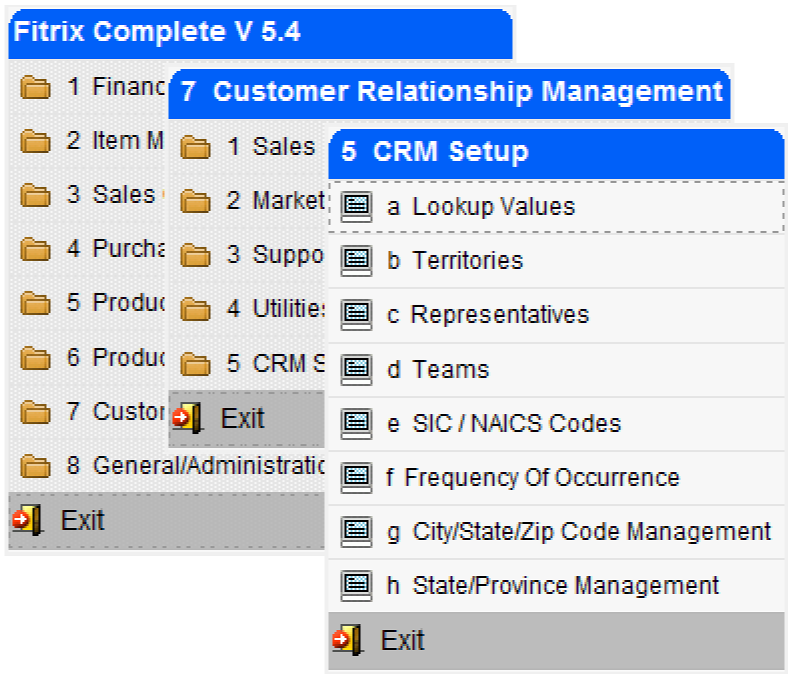
**CRM FEATURES/FUNCTIONS HIGHLIGHTS**

- **Modular Integration** – Direct integration with other Fitrix ERP modules
- **Account Management** – Fitrix CRM allows users to enter and maintain various demographic and other information about suspects, prospects and customers, and even other organizations like business partners, associations and competitors. Companies can be organized into hierarchies to track the 'parent-child' relationships of parent companies and subsidiaries at multiple levels.
- **Contact Management** – An unlimited number of contacts can be maintained for each company/account, with one being designated as 'primary' for each Account. Multiple phone numbers, email addresses and physical addresses can be managed for each contact.
- **Lead & Opportunity Management** – Fitrix CRM's Lead and Opportunity management capabilities allow sales and marketing personnel to track interactions and interest with Accounts from the very first (e.g. a trade show 'lead') to multiple individual sales opportunities for different products or services the Account may be interested in, with forecasting and tracking.
- **Quotes & Proposal Management** – With Fitrix CRM you can quickly and easily see quotes and proposals that you have sent your prospects and customers and turn these into sales orders when they are sold.
- **Team Selling Support** – Fitrix is designed with team selling capabilities built in that will continue to be enhanced over time to support a robust 'role-based' multi-member Account team model that is typical in more sophisticated sales organizations, but can also be used in more simplified settings with single-member or small sales teams.
- **Activity & Project Management** – Fitrix CRM lets users manages all kinds of Activities within Fitrix like calls, appointments, 'to-do's as well as build their own specialized types of Activities and track them. Projects are templates of reusable sets of Activities that can be scheduled and assigned to all or just Primary Contacts using Fitrix CRM's Campaigns features.
- **Campaign Management** – Fitrix CRM's Campaigns capabilities allow sales, marketing and service/support teams to build robust 'multi-media/multi-modal' campaigns that can be scheduled, assigned and managed to various lists of Accounts based on user-defined criteria.
- **List & Query Management** – The CRM module of Fitrix ERP allows users with proper access the ability to build, use and reuse powerful SQL queries via a standard Query By Example query capability. These lists can then drive Campaigns or feed other applications targeting prospects and/or customers with your company's communications or other interactions.
- **Case/Incident Management** – Fitrix CRM includes a powerful Case Management capability that allows customer service/support personnel to track and manage cases/calls/incidents/issues/etc. Help desk or call center users can assign cases to the most competent/available personnel using a rules-based facility.

- **Problem Management** – Tracking problems and identifying trends so that major customer service issues can be addressed proactively is an important feature that Fitrix CRM's Problem management feature helps automate.
- **Sales Lead & Support Call Dispatch** – Rules can be set up within Fitrix CRM that determine how new sales leads and new support cases are assigned or dispatched, based on factors such as geography or skill set of agents.
- **Scheduling Service/Support Calls** - This set of programs enables the scheduling of work out in the field. They allow for the dispatcher/service coordinator to enter appointments for customers, print or email the service ticket for the appointment, and then review all active appointments via either an inquiry program or a calendar program in four different views; by employee, by service coordinator, by customer or by type of service being performed. Also included is a suite of reports that can be emailed to the employee, service coordinator, or customer that contain details on active appointments for the date range specified.

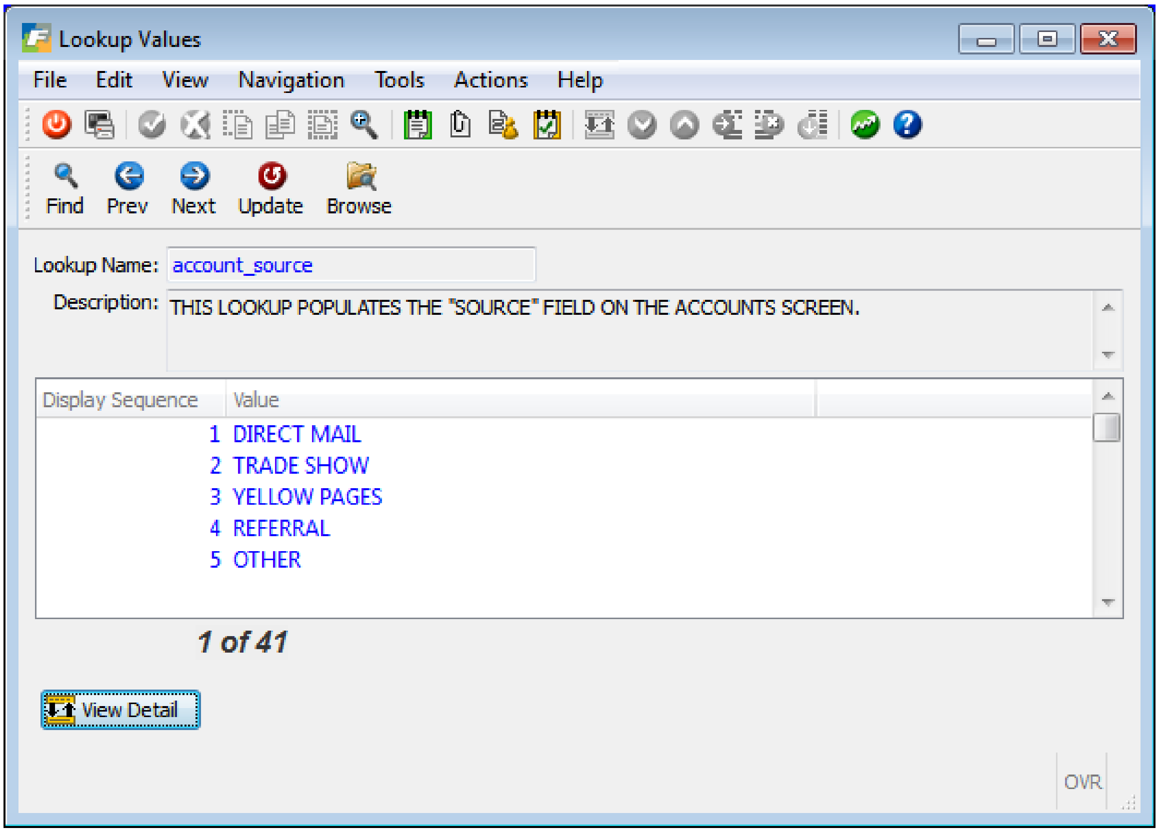
# Chapter 2 – CRM Set Up

This chapter covers the set up required prior to using the Fitrix ERP CRM module



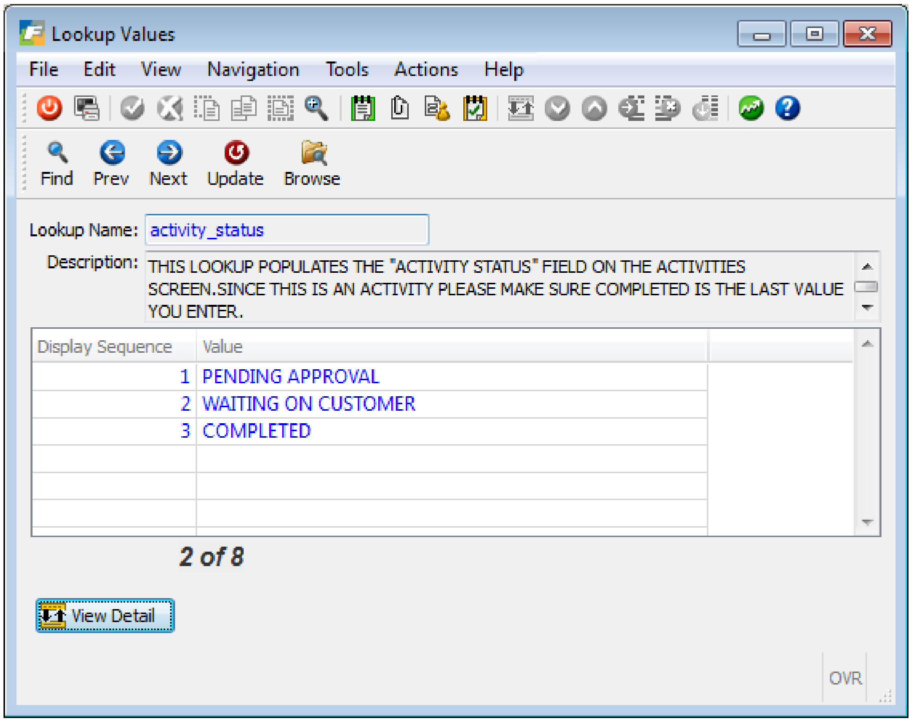
# Lookup Values

Fitrix comes with 41 pre-defined lookup values that are used by the various CRM programs. What you must do is define the values for each of these look ups. In the example below the lookup name "Account Source" is the source where your Account came from. When entering Accounts you can select from a list of the source values you have set up.

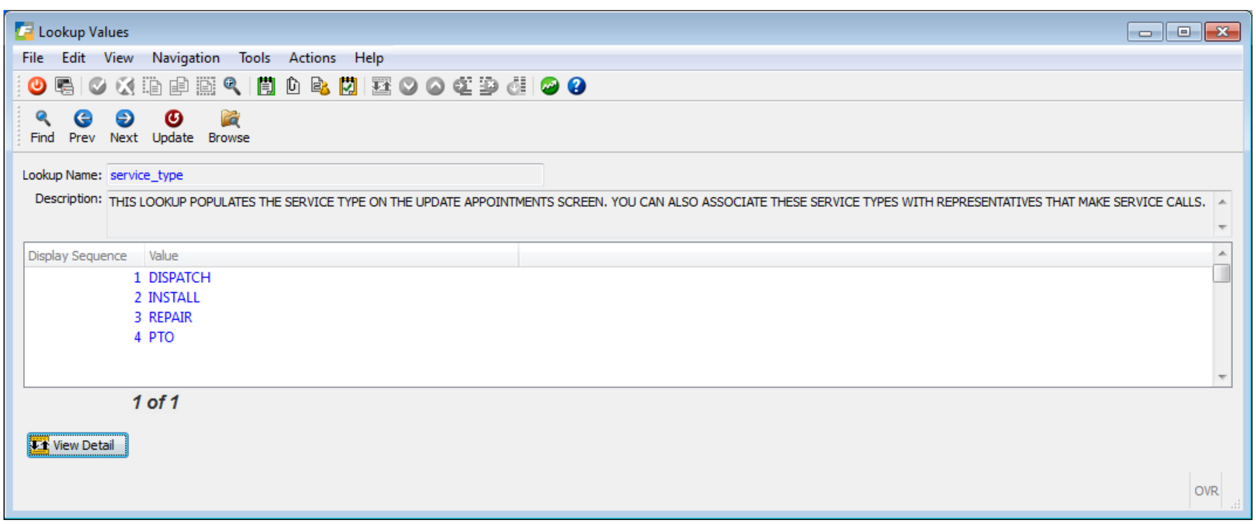



To update your source values go into Update mode and enter the display sequence number (the order you want the list of sources to display in the programs lookup list) and the source value.

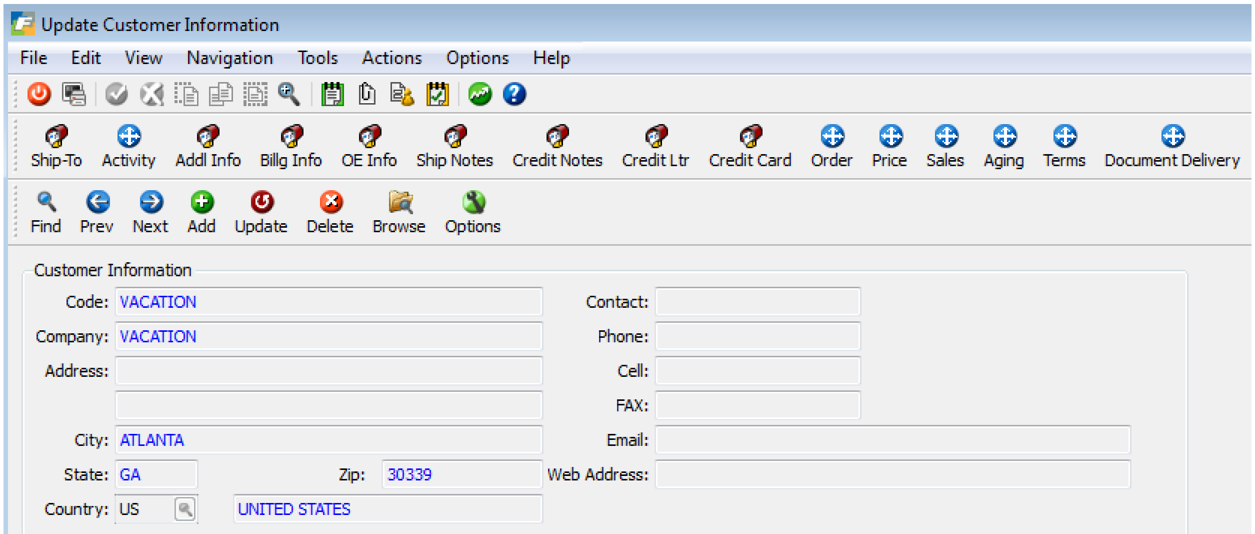
**Important Note #1:** If the lookup is for an activity status (ie- activity status, campaign status, etc.), make sure the display sequence has COMPLETED as the last value in the list. Throughout the CRM module when you check that an activity has been completed its status will be set to the last lookup value found in the lookup table which is why COMPLETED should be the last value.




**Important Note #2:** If you also want to block off time for employees personal time off (PTO) on the Services scheduling calendar program so you can see on the calendar the days they are not available to take appointments, set up a service type for this too as shown here.



Since appointments must be attached to a customer you must then set up a "dummy" customer for any type of PTO time you need to track on the Appointment calendar.

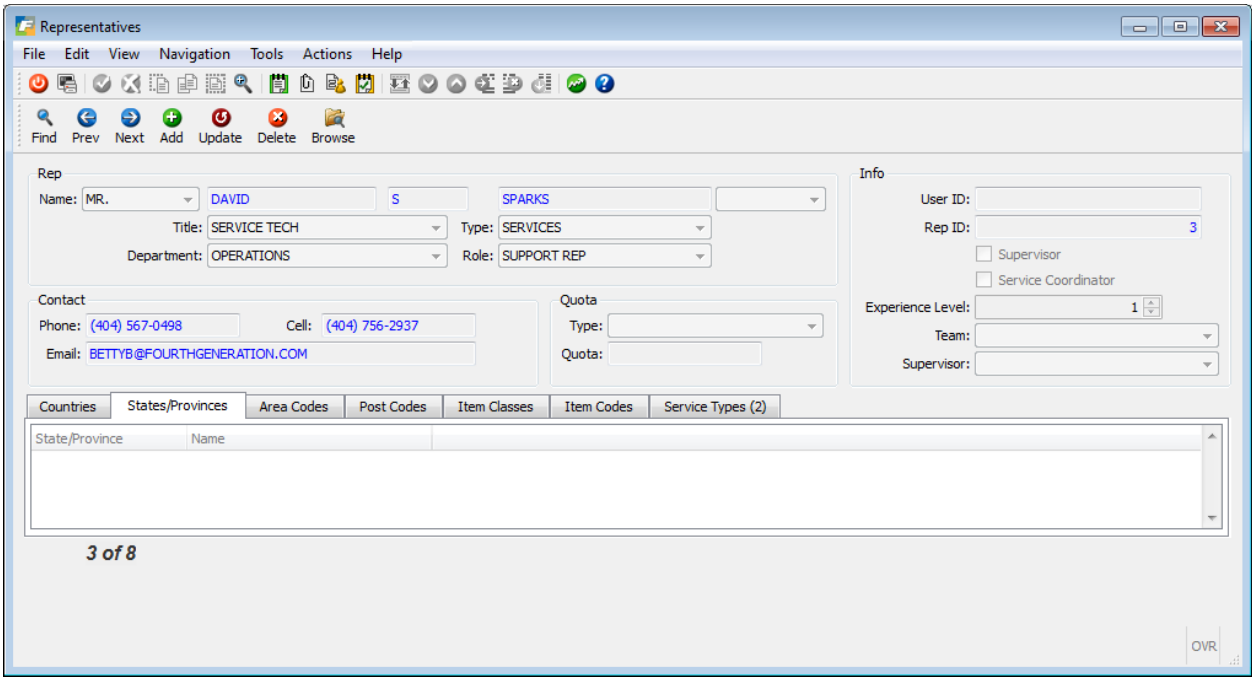



## Territories

Territories are not currently utilized in Phase I release of the CRM module. When they are utilized the user will be able to assign a territory to be in charge of Leads, Opportunities, and Cases. Currently the Cases program uses a geographical hierarchy based on zip code when assigning them to representatives and the Leads and Opportunities programs use a manual selection of representatives and teams.

## Representatives

Use this program to enter representatives that work for your organization. These representatives can be sales reps assigned to Accounts or service reps assigned to support cases and scheduled appointments.




**Name**- enter the representatives name.

**Title**- select a predefined title.

**Type**- select a predefined type of rep (ie- sales, services, technical support).

**Department** – select a predefined department the rep works in.

**Role** – select a predefined role the rep plays.

**Contact Info** – enter contact information.

**User ID** – enter user ID. By associating user ID with a rep ID a task that is assigned to a rep with an alert on it will display for this user id when they are logged in.

**Supervisor**- check whether the rep is a supervisor.

**Service Coordinator** - only employees that have this box checked can be assigned as the service coordinator for appointments.

**Experience Level**- enter the experience level, the higher the number the more experienced.

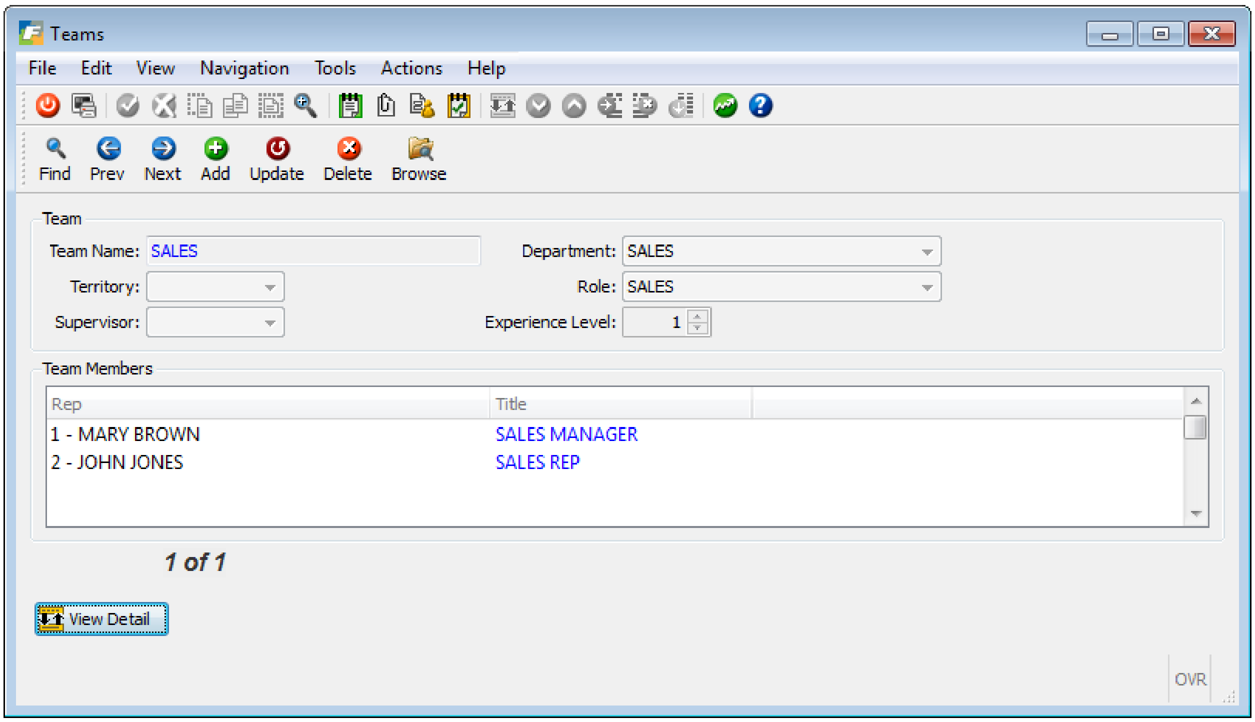
**Team**- select a predefined team for the rep.

**Supervisor** –select the rep's supervisor if there is one.

**Detail TABS**- to enter country, state, area codes, post codes, items and item classes they have expertise with, and the service types/calls they are qualified to work on click on each folder tab.

# Teams

This program is used to assign representatives to teams and these teams can then be assigned to Accounts, Opportunities, etc.




**Team Name**-enter the name for the team.

**Department-** select a predefined department the team works for.

**Territory** – select a predefined territory the team represents.

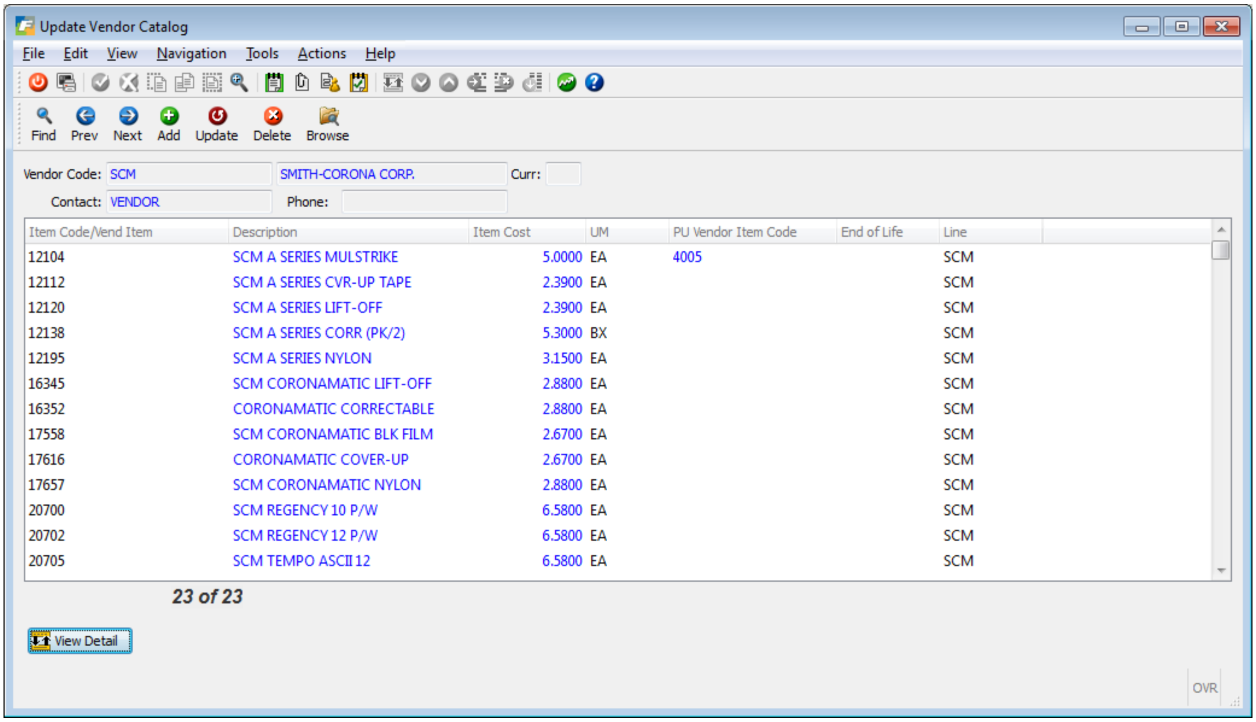
**Roles**- select the role the team covers (ie- service).

**Supervisor** – select the team's supervisor.

**Experience Level**- enter the experience, the higher the number the more experienced.

**Rep** - select the reps that belong to the team

**Title** – display only.




The fields located in the header portion of the screen are available for viewing only.
Any updates to the header vendor information must be entered through the Purchasing module.

**Vendor Code**

This field displays the code which represents the vendor. The full vendor name is displayed to the right of the vendor code.

**Currency**

If the Multicurrency module is installed through the Accounts Payable or Purchasing module, this field displays the default currency code defined for the vendor.

**Contact**

This field displays the name of the contact person associated with the vendor.

**Phone**

This field displays the telephone of the vendor/contact person.

**Item Code**

Enter the item code for the item which you would like to add or update. This item code must have been previously set up through the Inventory Control module. A Zoom is available to assist you in choosing from among valid item codes.

**Vendor Item Code**

Enter the code under which the vendor stocks the item, if you wish. This field is free-form up to 20 characters. This code will print on purchase order along with your item code.

**Item Cost**

Enter your cost for this item when purchased from this particular vendor.

**End of Life**

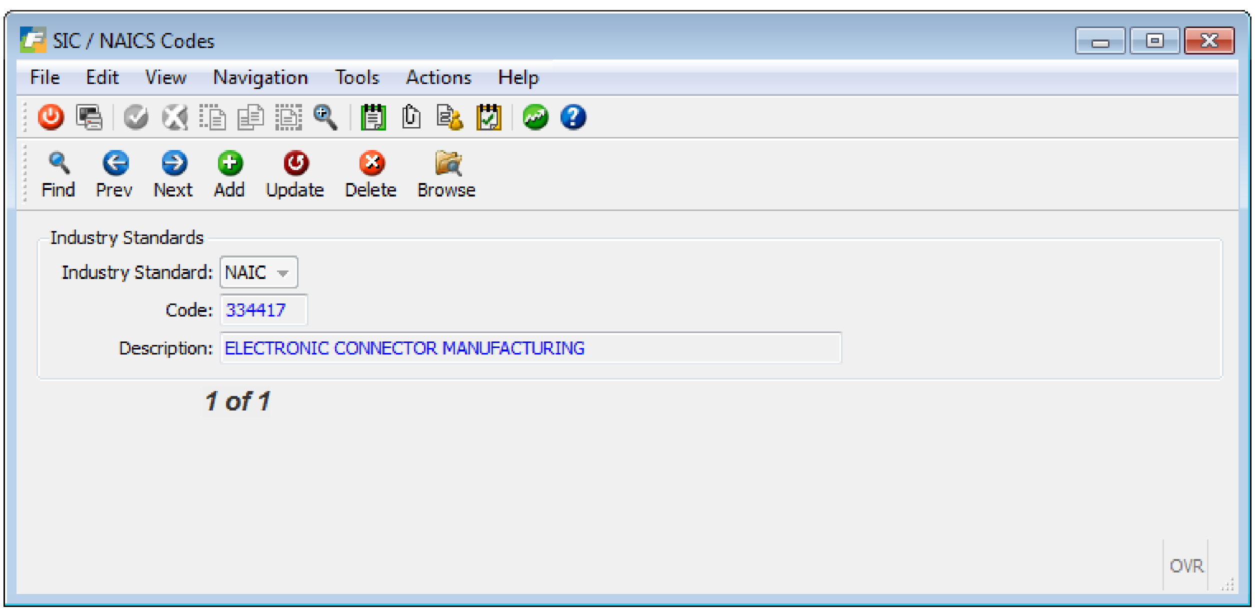
Optional field to enter the date the vendor will discontinue this product.

**Line**

Enter the code for the product line to which the item belongs. This field is not required as some items might not belong to a product line. These product line codes must have been previously defined through the Update Product Line screen.

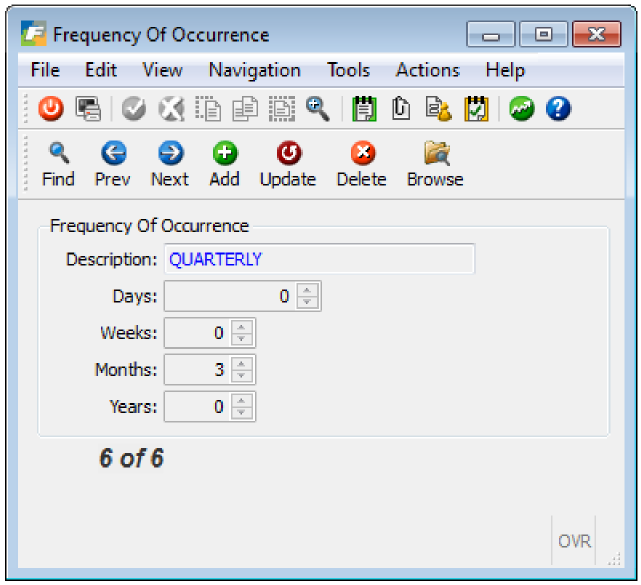
# SIC/NAICS Codes

Fitrix ERP CRM comes preloaded with all SIC/NAICS industry codes. You can then assign an SIC/NAICS code to your Accounts to denote the Account's industry type.



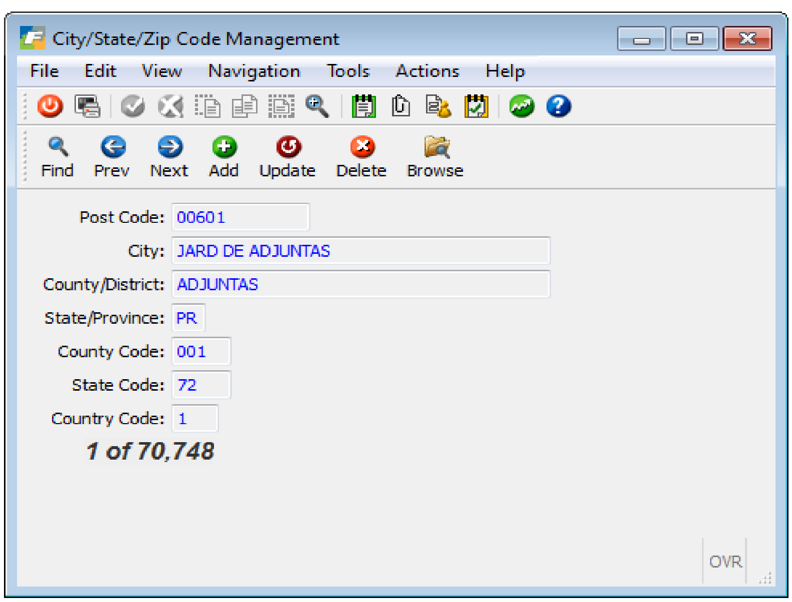
# Frequency of Occurrence

This program is used to set up time periods that can then be assigned to marketing campaign activities.



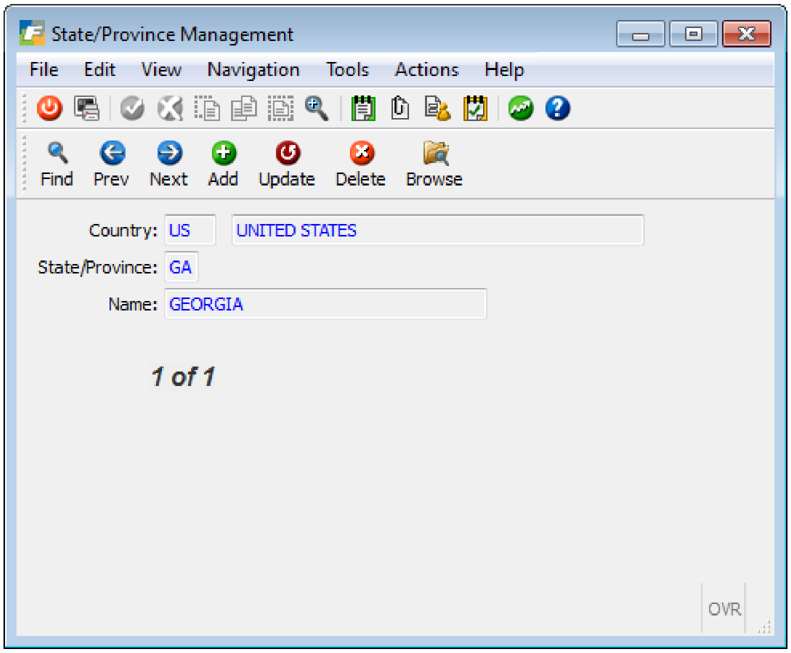

# City/State/Zip Management

Fitrix ERP CRM comes preloaded with all city/state/zip code combinations and the values here are used to verify address information in the various CRM programs.



# State/Province Management

Fitrix ERP CRM comes preloaded with all states and provinces and the values here are used to validate state/province assignments to reps, teams, etc.



# Lab Exercises

1. Set up the following new lookup values

| | |
|---|---|
| Account Source | Telemarketing Campaign |
| Role | Operations Manager |
| Activity Type | Onsite Meeting w/ Prospect |

2. Do a Find on lookup value **service***. If REPAIR is not in the list of values go into Update Mode and add it.

3. Set yourself up as a representative that handles service calls and the service type you work on is REPAIR.

4. Find the SIC code for ELECTRONIC COMPUTERS.

5. Do a Find and browse all Frequency of Occurrence codes. If there isn't one for Bi-Annual ( twice a year) go into update mode and add it.

# Chapter 3 – Sales

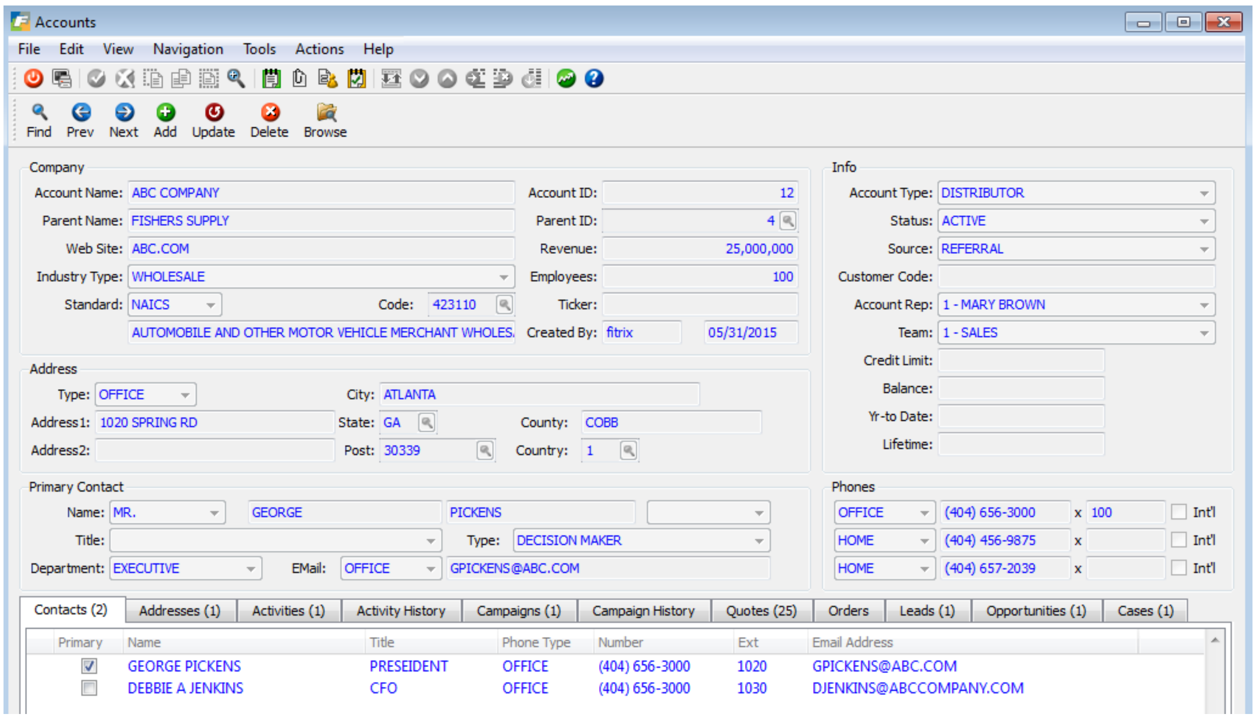
This chapter covers the following topics:

- Creating Accounts
- Creating Opportunities
- Creating Activities
- Creating Projects
- Creating Proposals

# Accounts

Select option (a) from Sales submenu to access the Accounts program. This program is used to manage your accounts.

To import your existing customers into the Accounts table or to import Prospects from a spreadsheet use the Import Accounts program discussed in the Utilities chapter of this training guide.



## Company Info Section

**Account Name (required)** – account name

**Parent ID** – if this account is affiliated with one of your existing customers zoom to find the customer id.

**Revenue**- if known enter the account's annual revenues.

**Industry Type**- drop down list of industries you have previously defined.

**Employees** – if known enter the account's number of employees.

**Standard** – valid values are NAICS or SICS.

**Code** – zoom to select the NAICS or SICS code.

**Ticker** – stock market ticker

**Created By –** the login ID of the user that created the account.

**Date** – date the Account was created.

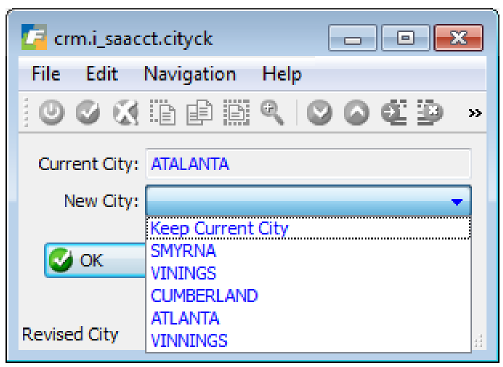
## Address Info Section:

**Type** – drop down list of address types you have previously defined.

**Address1 (required)** – enter address line one.

**Address2** – enter second address line if there is one.

**City, State, Zip, County, Country (required)** – if you enter a zip code that spans more than one city you will receive this prompt:




You can keep the city you entered or change it. Once selected, the county and country will be filled in automatically.

## Primary Contact Info Section:

Use this section to enter the address information for the primary contact for this account. This contact information can be edited in Add mode but not in Update mode. To update the primary contact information you must be in Update mode, click on the contacts tab and then click on the contact row you want to change.

**Name -** drop down list of salutations you have previously defined.

**First Name**

**Last name**

**Abbreviation** - drop down list of abbreviations you have previously defined.

**Title**- drop down list of titles you have previously defined (ie- president).

**Type** - drop down list of types you have previously defined (ie- decision maker).

**Department** - drop down list of departments you have previously defined (ie- executive).

**Email**- drop down list of email types you have previously defined (ie-work).

**Email address**

## Info Section:

**Account type (required)** - drop down list of types you have previously defined (ie- distributor).

**Status (required)**- drop down list of statuses you have previously defined (ie-active).

**Source** - drop down list of sources you have previously defined (ie- referral).

**Account Rep (required)**- drop down list of your company's account reps.

**Team** - drop down list of your company's teams.

**Credit Limit** – as defined on the customer master program.

**Balance** – current balance due found in the customer master program.

**Yr-to Date** – year to date sales.

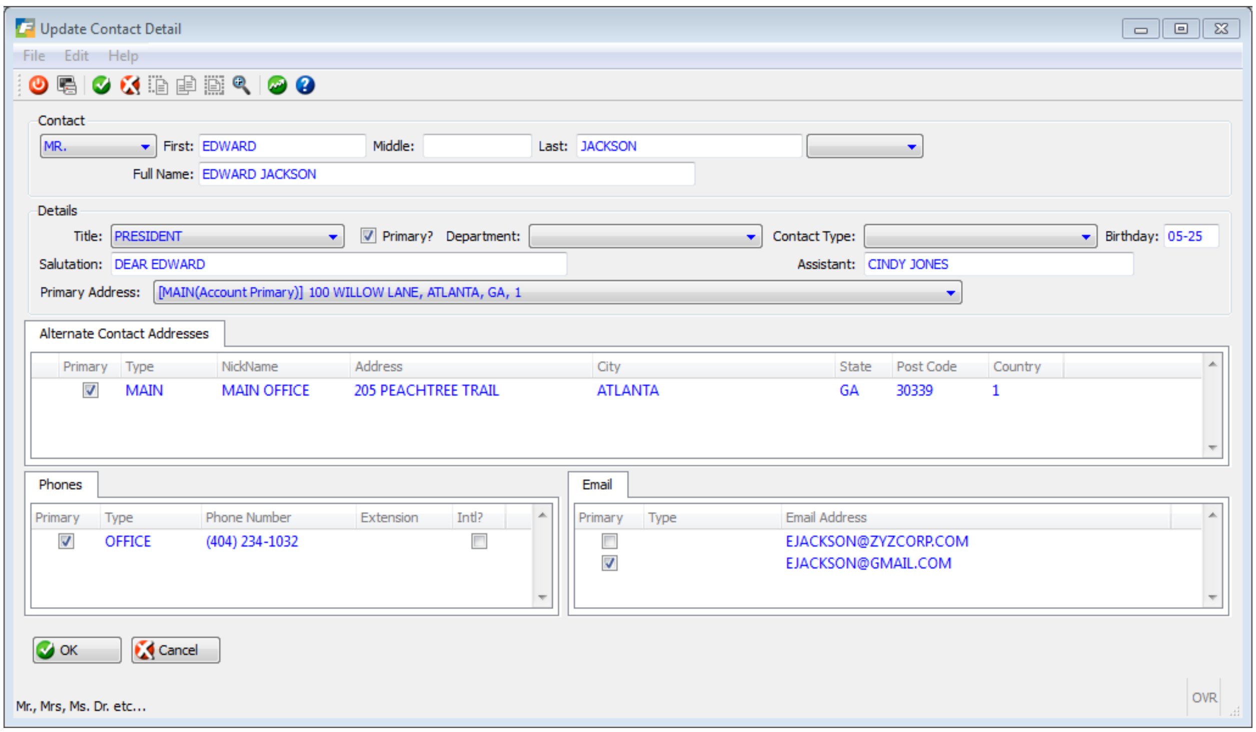
**Lifetime** – total sales made to this Account.

## Phones Section:

Enter the company's phone numbers. There can be three defined (main, fax, etc.) The phone numbers for the primary contact are entered on the Contacts screen described next.

## Contacts folder tab:

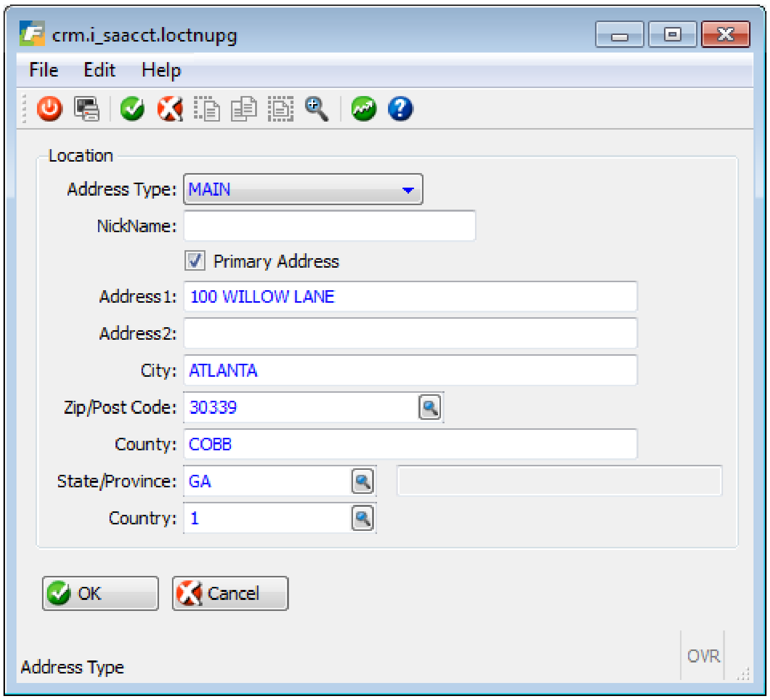
To access contacts, go into Update mode and click on this folder tab. To edit an existing contact, double click the row that contains the contact you wish to edit. To enter a new contact, double click on a blank row.




To enter alternate contact addresses, phones, and emails simply click on the folder tab and double click on a blank row.

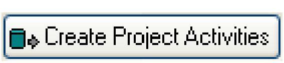
## Addresses folder tab:

To access addresses, go into Update mode and click on this folder tab. To edit an existing address, double click the row that contains the address you wish to edit. To enter a new address, double click on a blank row.

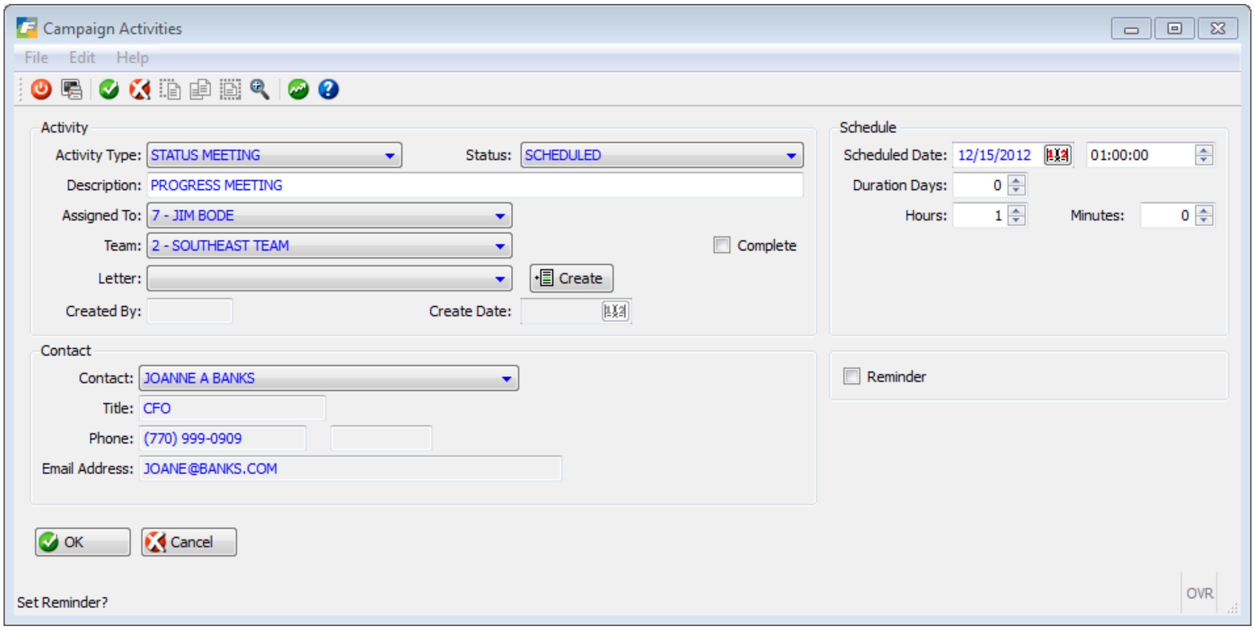



The address that is designated as Primary Address will be the address that displays on the Accounts screen.

## Activities folder tab:

To access activities, go into Update mode and click on this folder tab. To edit an existing activity, double click the row that contains the activity you wish to edit. To enter a new activity, double click on a blank row. You can also create a list of activities from a project template by clicking on the 

button. See Projects for more information on how to set up these templates.



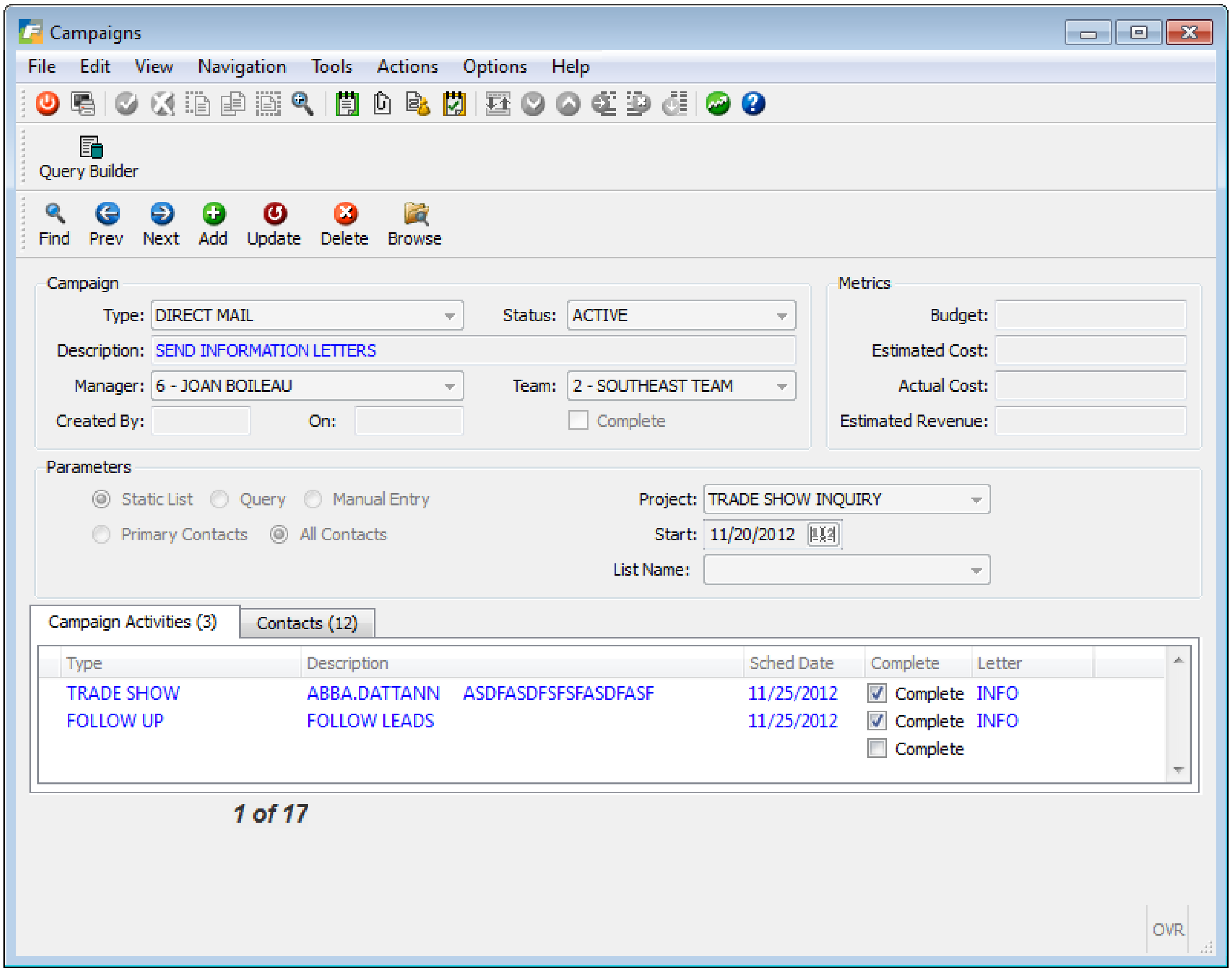

Activities can also be added by using the Activities menu option (d) on the Sales menu. See the Alerts/Alarms section in the Utilities chapter of this training guide for how to set up reminders for activities you are responsible for.

## Activity History folder tab:

Once an activity is marked completed on the Activities screen it is moved to this folder for viewing. Only active activities stay in the Activities folder.

## Campaigns folder tab (view only):

To access campaigns, go into Update mode and click on this folder tab. To view an existing campaign, double click the row that contains the campaign you wish to view. To enter a new campaign, you must use the Campaigns program on the Marketing menu.




## Campaigns History folder tab (view only):

Once a campaign is marked completed on the Campaigns screen accessed from the Marketing menu it is moved to this folder for viewing. Only active campaigns stay in the Campaigns folder.

## Quotes folder tab:

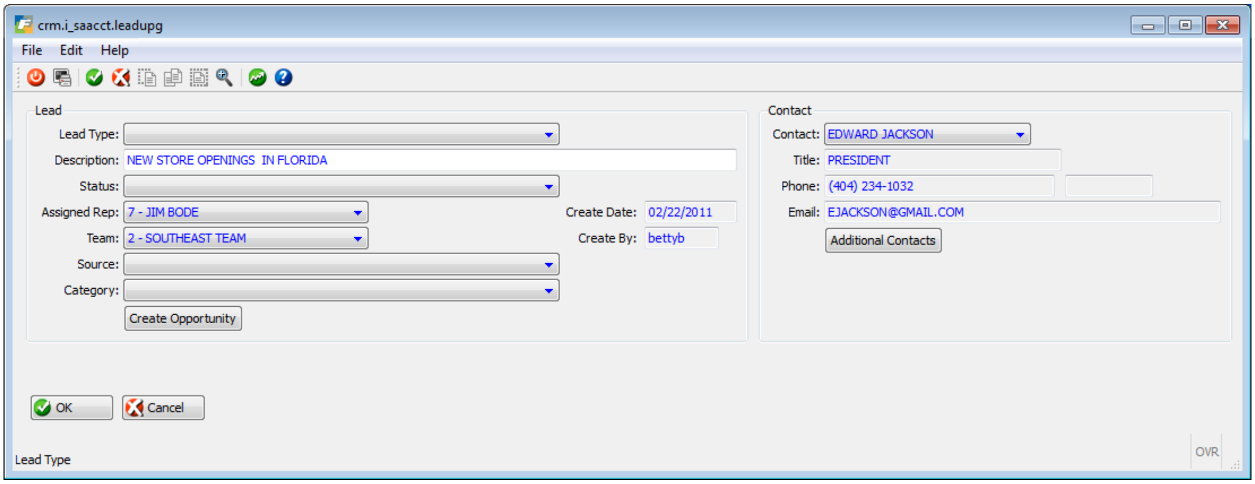
Use this folder tab to add quotes or to view any active quotations that have been entered through Sales Order entry for accounts that are customers, and to add or to view proposals entered using the Proposals program on the Sales menu for accounts that are not yet customers .

## Orders folder tab:

Use this folder tab to add orders or to view any active sales orders that have been entered through Sales Order entry for accounts that are customers.

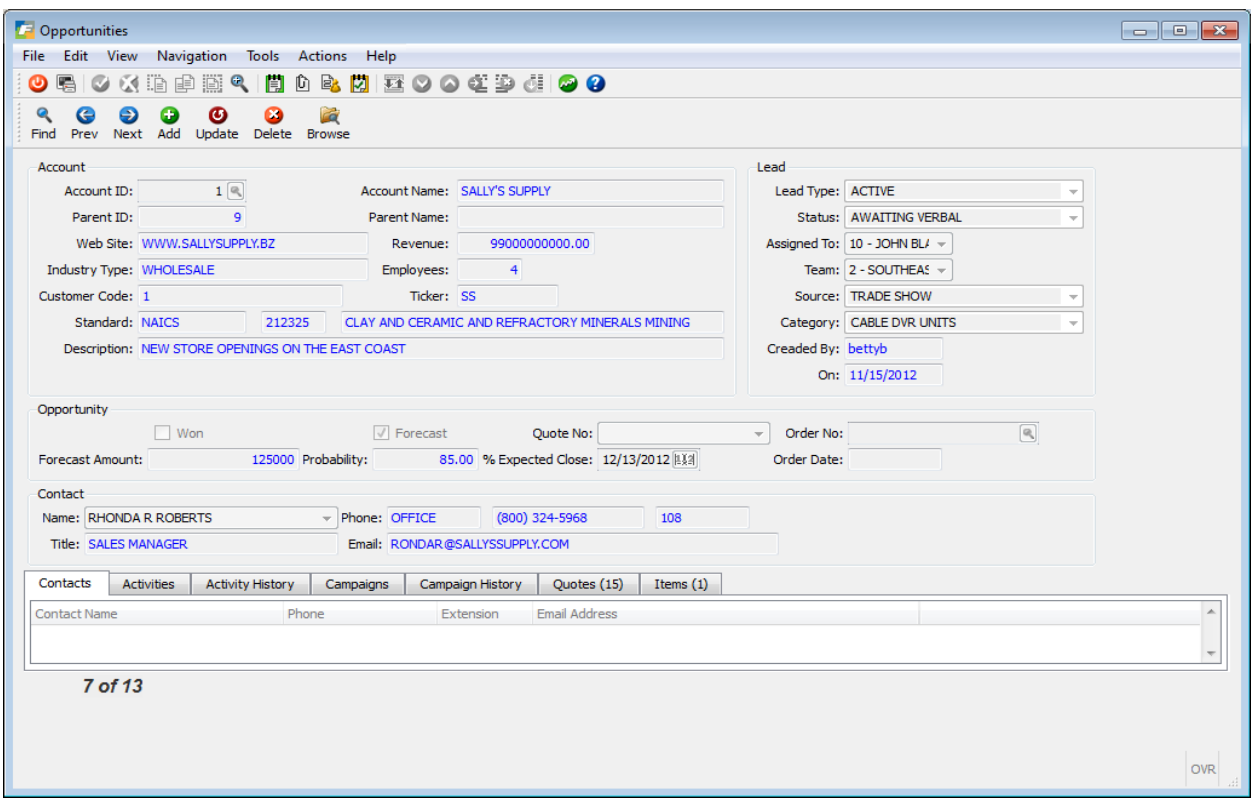
## Leads folder tab (view only):

Use this folder tab to view any leads that were set up using the Leads program on the Marketing menu.




# Opportunities

This program is used to enter potential opportunities you have with your accounts.



**Account ID** – enter or zoom to find.

**Description** – description for this opportunity (scrolling field).

**Won**- check this box when the opportunity is won.

**Forecast** – check this box to include this opportunity in the total forecasted dollars.

**Forecast Amount** – forecasted dollar amount.

**Probability** – probability % to win.

**Quote No** – select quotation number if this opportunity is tied to a quote.

**Order No** – select sales order number if this opportunity is tied to a sales order.

**Expected Close** – date you expect to close.

**Lead Type** – select lead type.

**Status** – select status.

**Assigned to** – select assigned to.

**Team** – select team.

**Source** – select source.

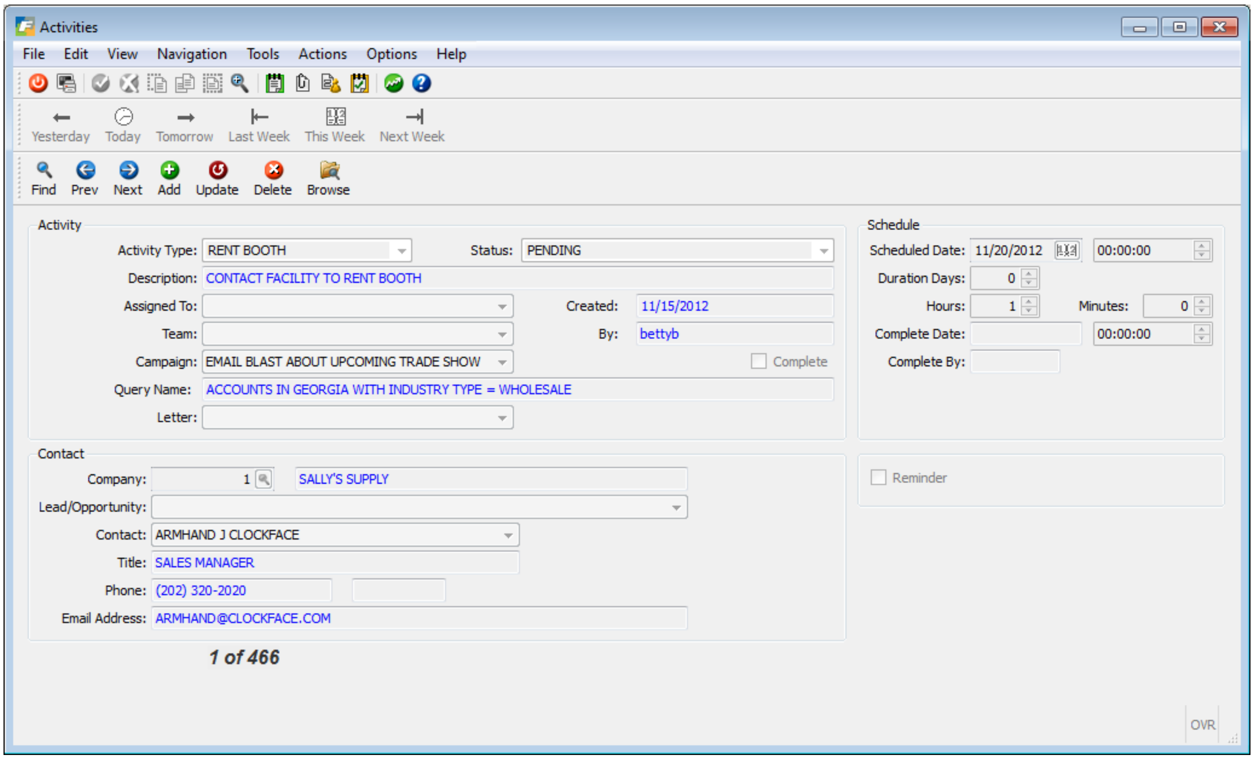
**Category** – select category

**Contact Name** – select the contact name for this account/opportunity.

The folder tabs in the detail section are same folder tabs you can access using the Accounts screen with the exception of the items folder tab. Use this to select inventory items that are associated with the opportunity.

# Activities

This program is used to set up activities that need to be followed up on. You can also set up reminders so that you are automatically notified when an activity requires your attention.




**Activity Type** – select an activity type.

**Status** – select a status for this activity.

**Description**- enter a description.

**Assigned To** – select who the activity is assigned to.

**Team** – select a team.

**Campaign** – select a campaign if this activity is associated with one.

**List Name** – if the activity was generated via a campaign using a list the list name displays here.

**Letter** -  select a letter code for a letter that you want to send.
**Company** – select company.

**Lead/Opportunity** – select one if this activity is associated with one.

**Contact** – select Account contact.

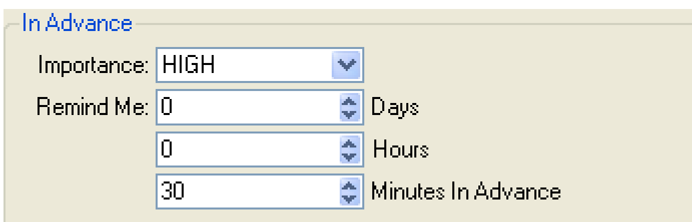
**Scheduled Date** – enter date.

**Duration Days** – enter number of days.

**Hours**- enter number of hours.

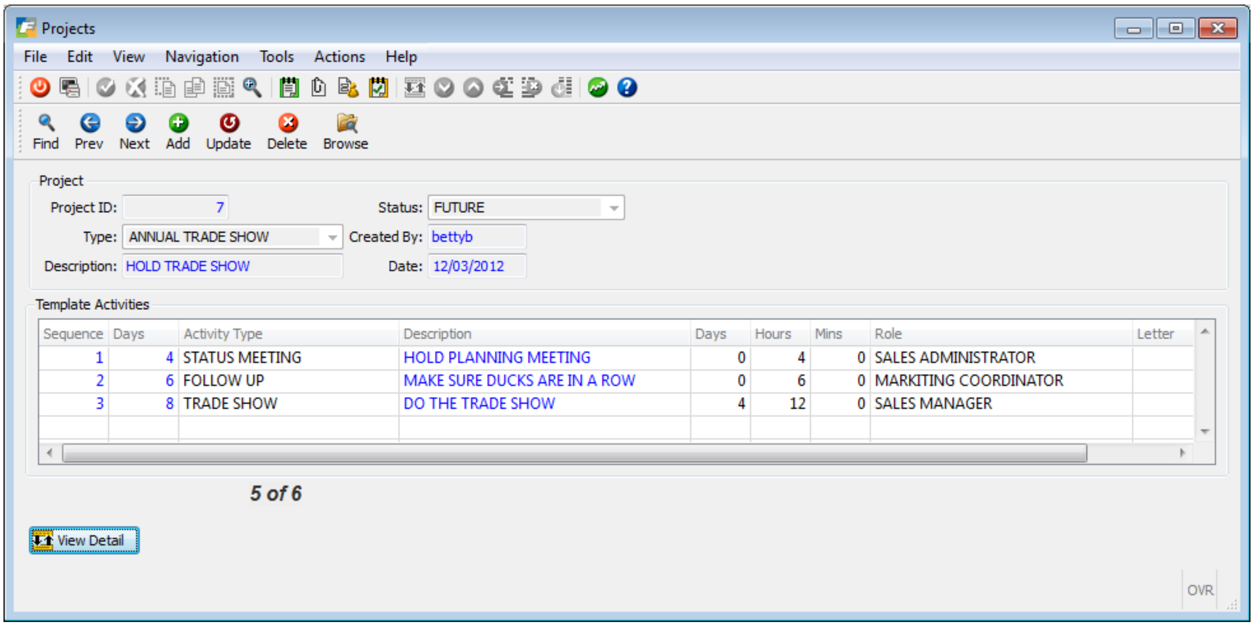
**Minutes** – enter number of minutes.

**Reminder check box**- if you check this, additional fields will display so that you can enter information about the reminder.



# Projects

A project is a template of activities that can then be assigned to a campaign. The template below is an example of the types of activities that can be associated with a trade show.




**Project ID** – next sequential number assigned by the program.

**Status** – select status.

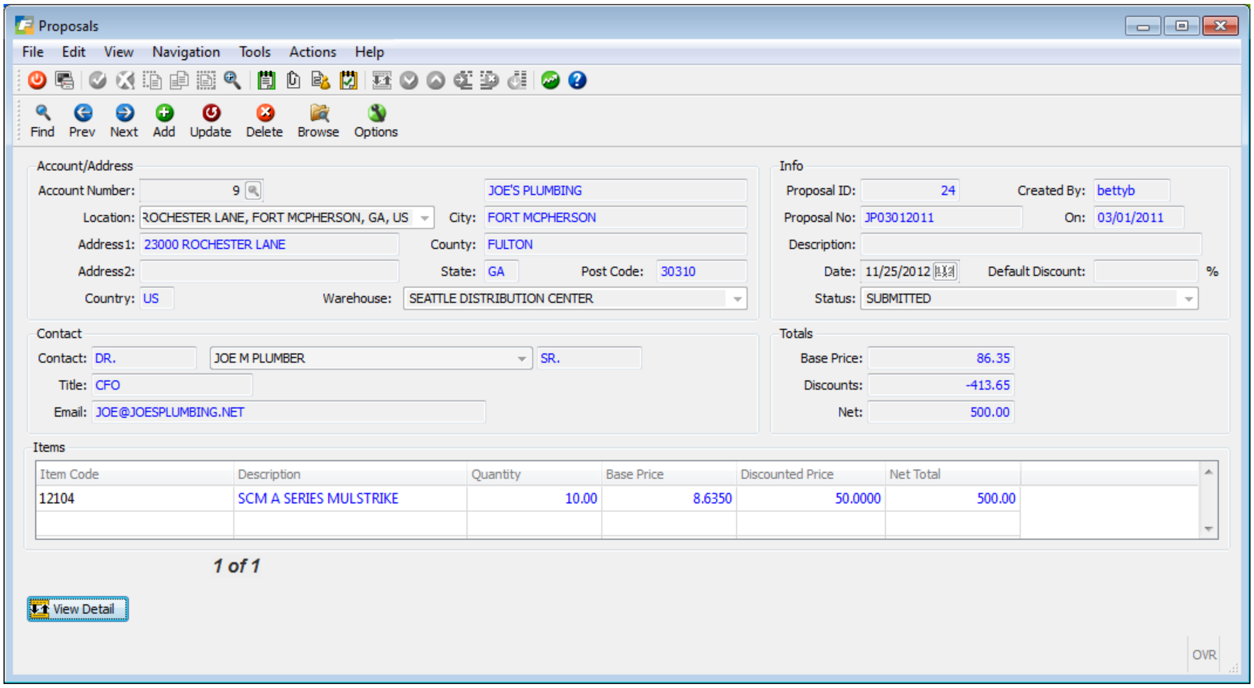
**Type**- select the type of project.

**Description** – enter a description.

In the detail section enter the sequence, duration, activity type, the role of the person the activity is assigned to, and the type of letter that should be sent.

# Proposals

Use this program to enter proposals for your Accounts that are not yet customers (versus using quotes for Accounts that are customers).




**Account Number**- enter or zoom to find Account number.

**Location** – select the Account's location.

**Warehouse** – select the warehouse location the items will be shipped from.

**Contact** – select the contact the proposal should be sent to.

**Proposal No** – enter the proposal number.

**Description** – enter a description for the proposal.

**Discount** – enter % discount off list price.

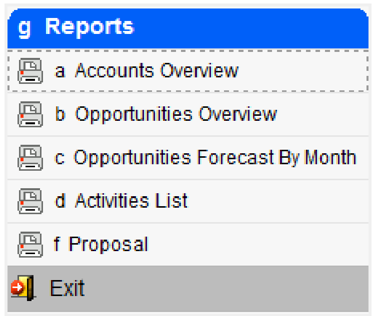
**Status** – select a status for the proposal.

In the detail section, enter the items for this proposal and their quantities. The discounted price that is calculated is the list price for the item/warehouse less the default discount percent entered in the header portion of the screen.

You can then use the option button on the toolbar to launch the proposal print program . You can also print the proposal from the Reports menu option.

# Sales Reports

Fitrix CRM has the following sales reports:



## Lab Exercises

1. Set up your company as a new account with at least 4 different contacts and two addresses, one for the office and one for the warehouse. If there any lookup values missing that you need in order to set up the account go to the Lookup Value submenu and set them up.
2. Set up an opportunity using the account ID 1. You have the potential for selling into their West Coast Market. It's an active lead that's been qualified assigned to you. The lead source is referral. The forecasted amount is $500,000 and you have a 50% probability of closing it by the end of the year.
3. Set up a new activity for yourself for a sales call to Action Auto Parts to discuss the new sales special your running for 90 days. The call will take place at 1 pm tomorrow and last for one hour. Set up a reminder so you're reminded 30 minutes ahead of time.
4. Set up a future project for a trade show. If trade show does not exist go to the lookup program on the CRM set up menu and add it. The activities are as follows (and if any not found set them up):

| | |
|---|---|
| Day 1 | Rent a booth |
| Day 2 | Email blast |
| Day 10 | Make travel arrangements |
| Day 30 | Trade show that last for 5 days assigned to the Sales Manager |

Enter a proposal for account #1 to sell them 10 of part # GM366250 at $1995 per. This will ship from your SEATTLE warehouse. Fill in the other information needed using any values you want to.

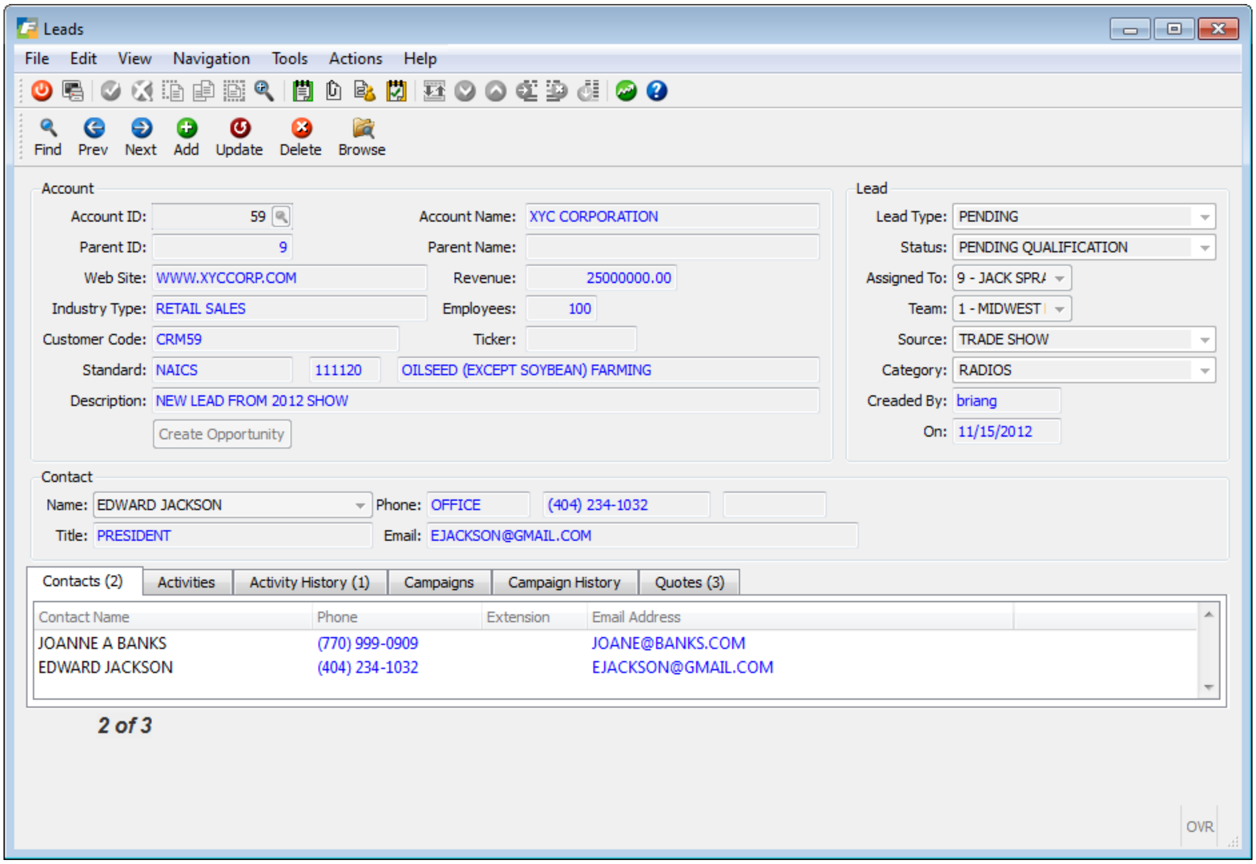
# Chapter 4 – Marketing

This chapter covers the following topics:

• Managing sales leads
• Managing sales campaigns
•Marketing reports

# Leads

This program is used to create leads that can then be turned into opportunities.




**Account ID** – select Account.

**Contact Name** – select contact.

**Lead Type** - select lead type.

**Status** – select status.

**Assigned to** – select rep ID.

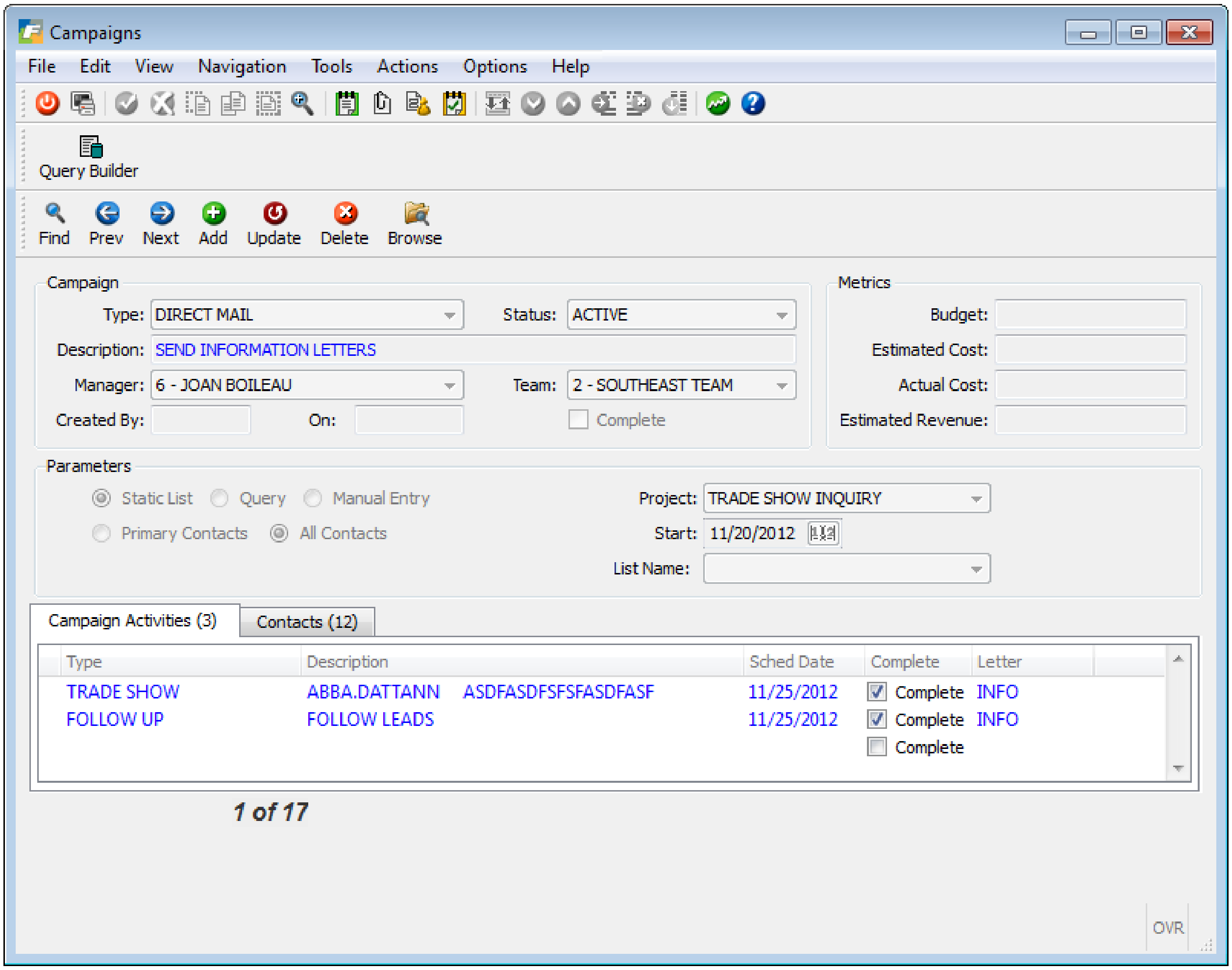
**Team** – select team.

**Source** - select source.

**Category** – select category.

# Campaigns

This program is used to set up marketing campaigns.




**Type** – select type of campaign.

**Status** – select a status.

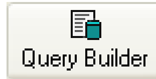
**Description** – enter a description for the campaign.

**Manager** - select the campaign manager.

**Team** – select a team.

**Complete-** check when the campaign is completed.

**Parameters**- select contacts from a list, a query, or enter manually.

To create a new query click on the  button.



**Contacts** – select Accounts primary contacts or all contacts.

**Project** – select a project template.

**Start** - enter the start date for this campaign.

**Name** - select list or query name.

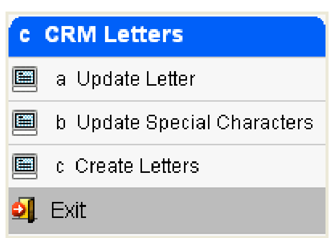
**Metrics** – enter budget, costs, revenues.

**Execute**- click on execute to activate the campaign. This will copy the activities from the folder   tab into individual activities for each contact in the Contacts folder tab.

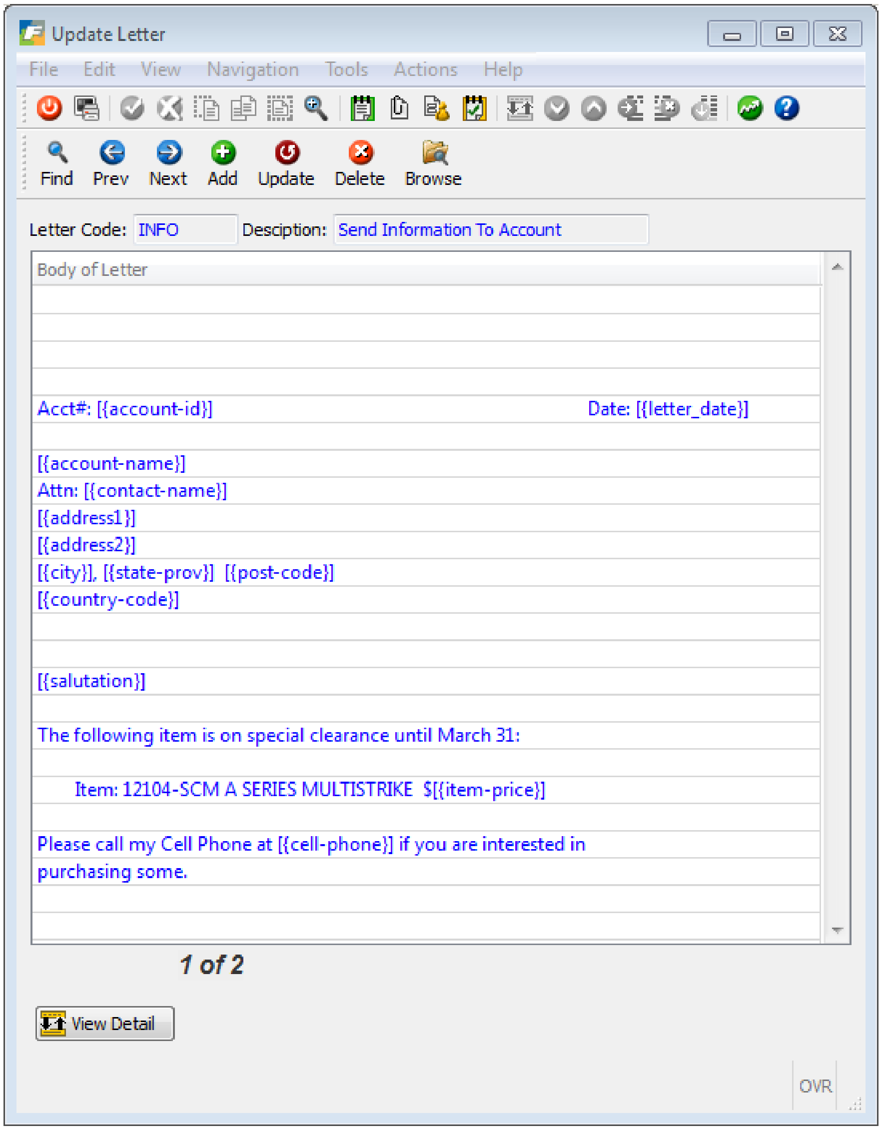
## Marketing Reports and Letters

Fitrix CRM comes with the following reports:

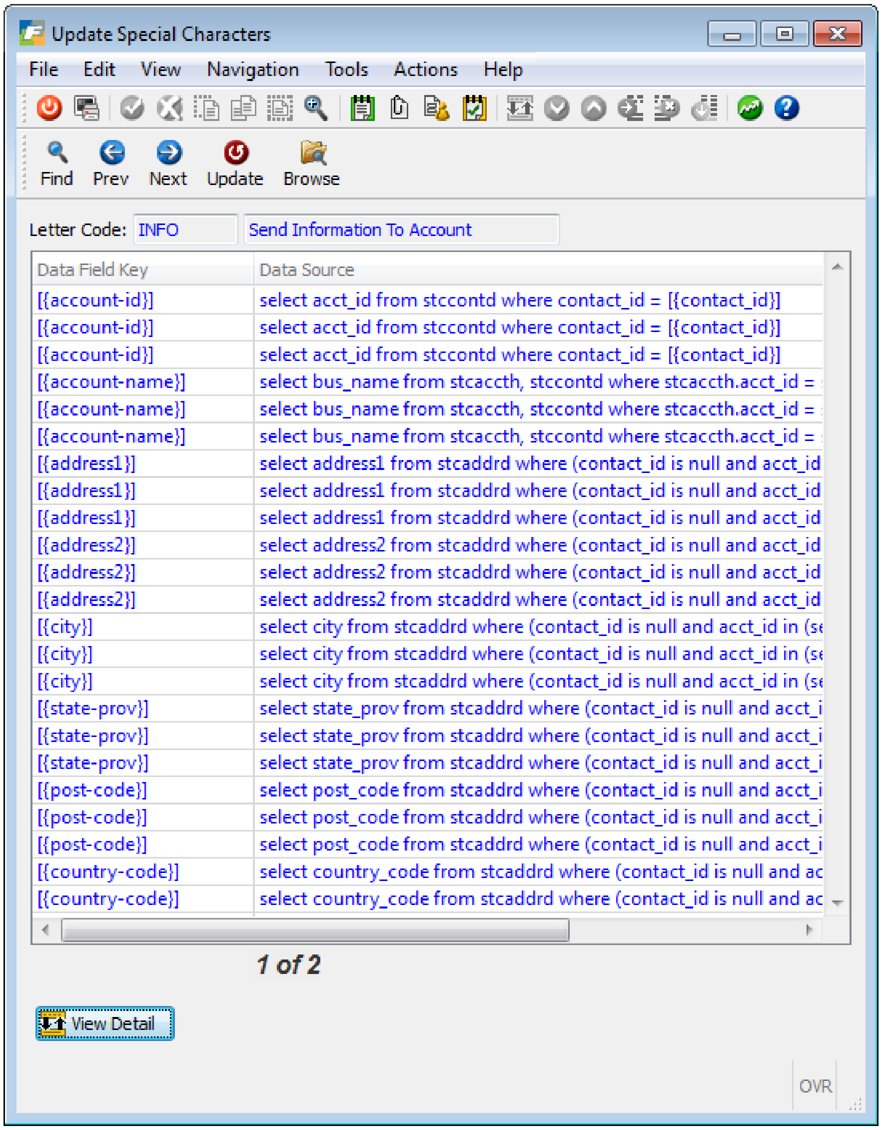

The CRM letters submenu has the following options and work just like the AR Dunning letters.




**Update Letter** – use this program to define your letter code and text. You must then use the Update Special Characters program to define the SQL statements that will retrieve   the data that will print on the letter from the database. In the example below the special characters  $?1 will pull the Account ID from the database.




**Update Special Characters** - use this program to define the SQL statements that will pull the data you want to print on the letter directly from the database.




**Create Letters -** typically letters will be printed from the Campaign or Activities program but you can alternately print them using menu option (c).

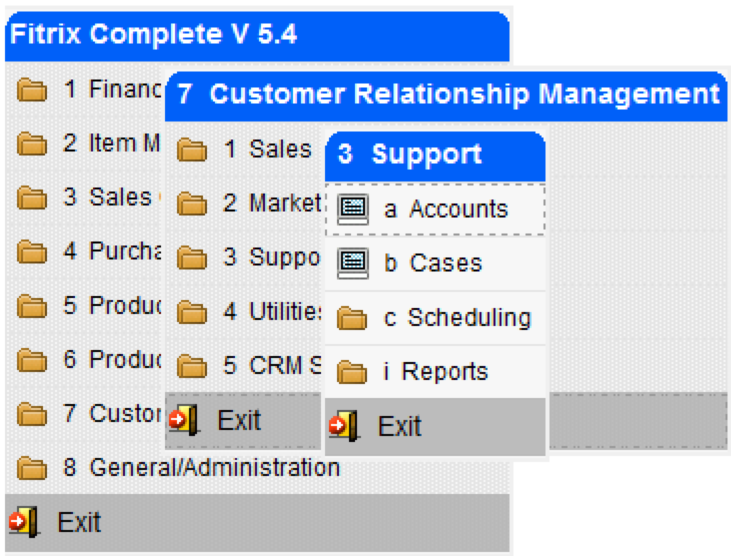
## Lab Exercises

1. You have an active, qualified lead that account #12 may want to buy your new line is automobile engines. Assign it to yourself and the source is DIRECT MAIL. Your contact is George Pickens. If this contact does not exist add him to this account and use any address/contact information you want to.
2. Enter a direct mail campaign to send your new product catalog. You're the manager and the budget is $15,000. You will manually select the accounts you're sending the mailing to and it should go to all contacts for the accounts. The campaign will start on the 1st of next month.

# Chapter 5 – Support

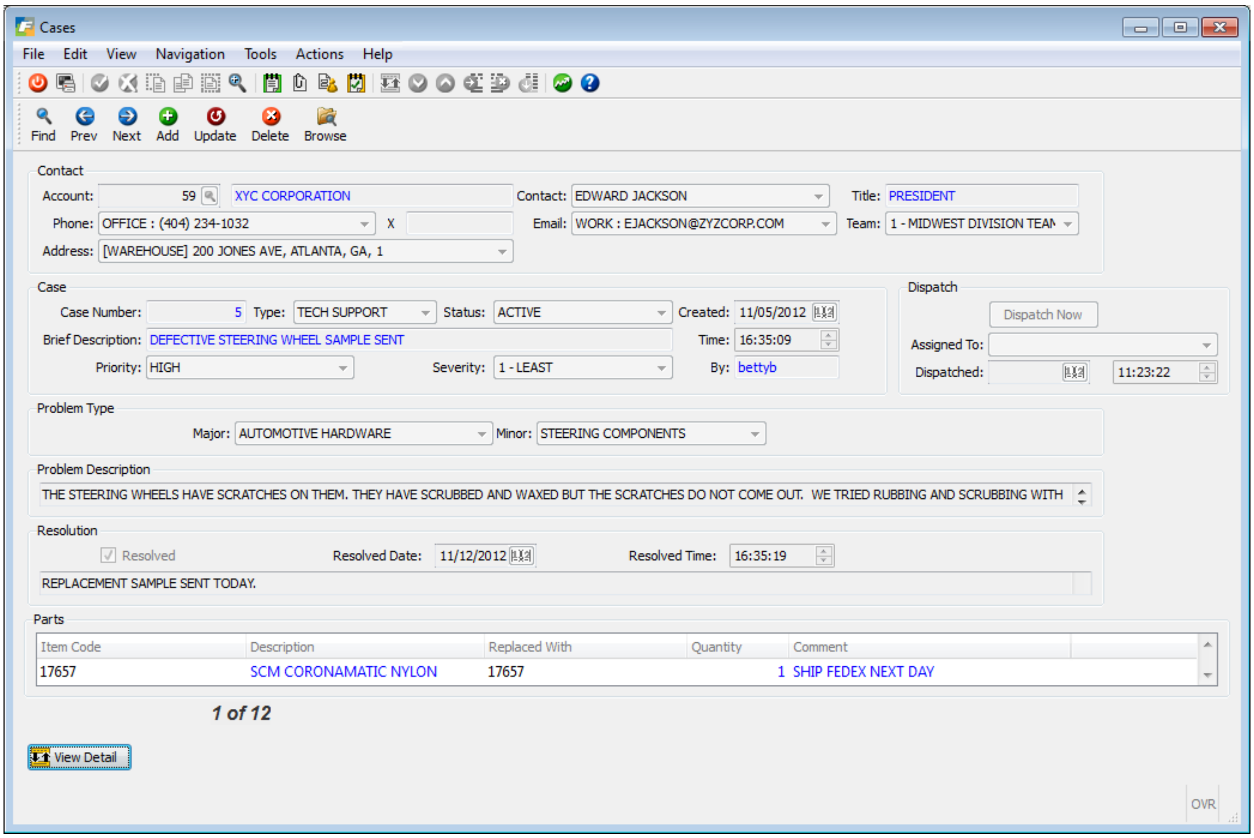
This chapter covers the following topics:

- Tracking support cases
- Scheduling service calls
- Support reports



# Support Cases

Use this program to log and track support cases.




**Account** – select account ID.

**Contact** – select Account contact.

**Phone** – select telephone number if different than the Contact's primary number.

**Email** - select email address if different than the Contact's primary email.

**Team** – select team.

**Address**- select address.

**Type** – select type of case.

**Status** – select status.

**Description**- enter a description for the case.

**Priority**- select a priority code.

**Severity code** – select a severity code.

**Problem Type** – select major and minor problem types (useful for queries).

**Problem Description** – enter problem description.

**Assigned To** – select a person to assign this case to or leave blank and click on dispatch to have a rep assigned to the case based on zip code.

**Dispatched date** – enter dispatch date or click on dispatch now and today's date will be selected.

**Resolved**- check this box when case is resolved.

**Resolved Date** – enter the date the case was resolved.

**Resolved Time** – enter the time the case was resolved.

**Resolution** – enter the action taken to resolve this case.

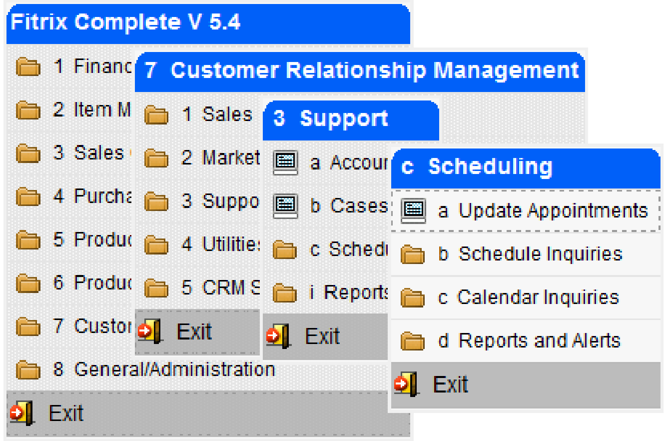
**Parts**- click on detail to enter information on parts and replacement parts.

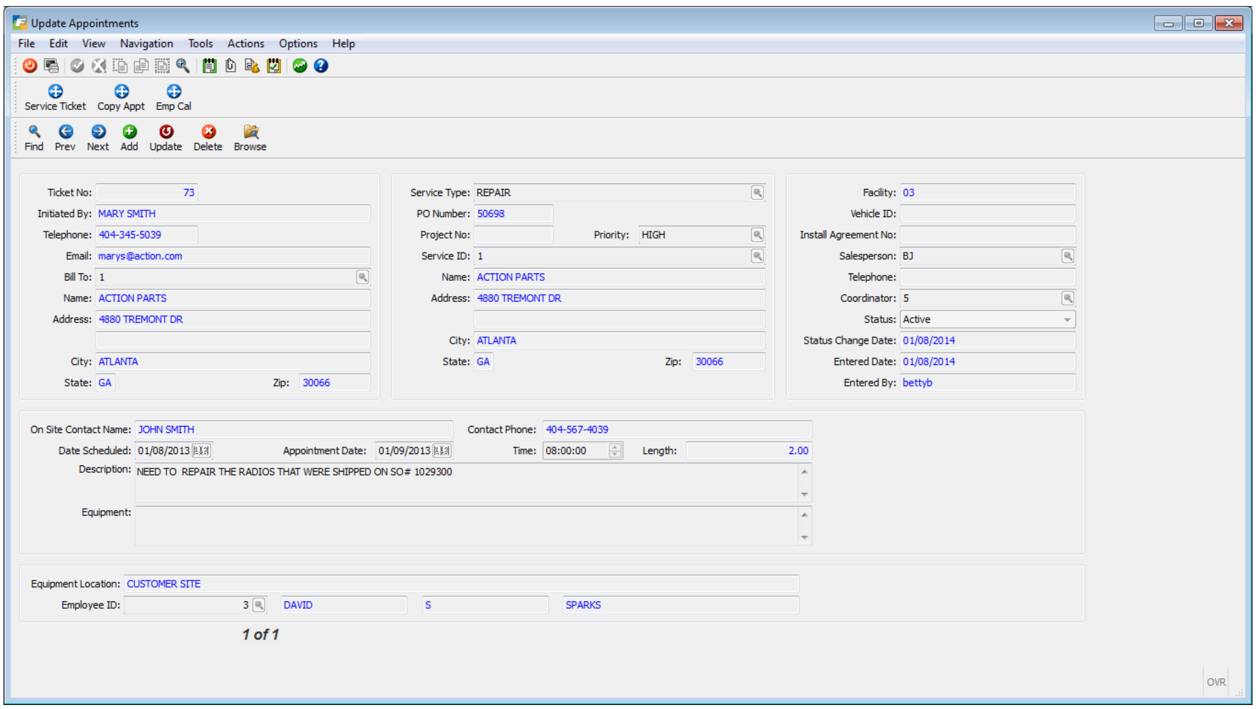
# Scheduling Appointments

This set of programs enables the scheduling of work out in the field. They allow for the dispatcher/service coordinator to enter appointments for customers, print or email the service ticket for the appointment, and then review all active appointments via either an inquiry program or a calendar program in four different views; by employee, by service coordinator, by customer or by type of service being performed. Also included is a suite of reports that can be emailed to the employee, service coordinator, or customer that contain details on active appointments for the date range specified.

**Entering Appointments**

Now that set up is complete you are ready to start entering your appointments using option (a) on the Scheduling submenu shown here.



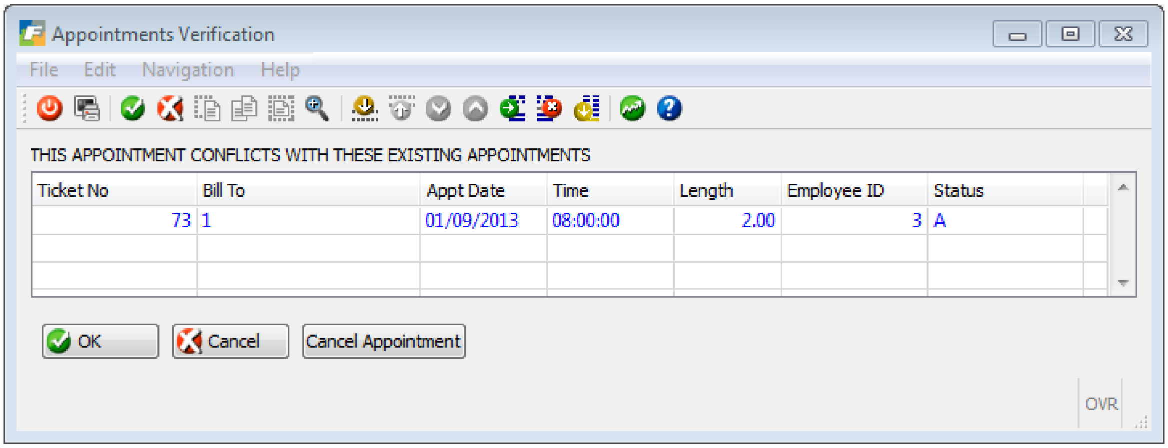




The following fields are requried values so that the appointment will display properly on the calendar:

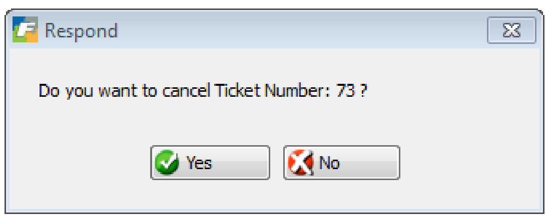
Initiated By
Bill To
Service Type
Priority
Service ID
Contact Name
Scheduled Date

Appointment Date, time, and estimated length of appointment
Employee ID
Service Coordinator
Status

If you enter an appointment and there is a conflict with an existing appointment, you will receive this error message and will need to change the date, time, or employee so there is no conflict.

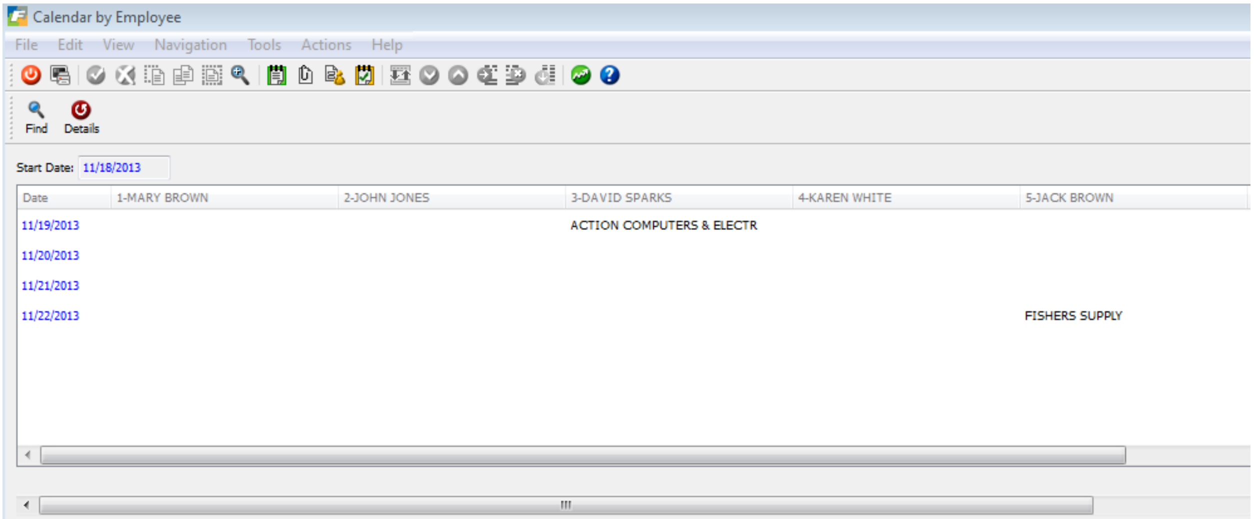



If you want to cancel the appoinment that presents the conflict, click on the Cancel Appointment button. Using the example above this would cancel ticket #73.




If you need to check the employee's calendar when entering new appointments click on the

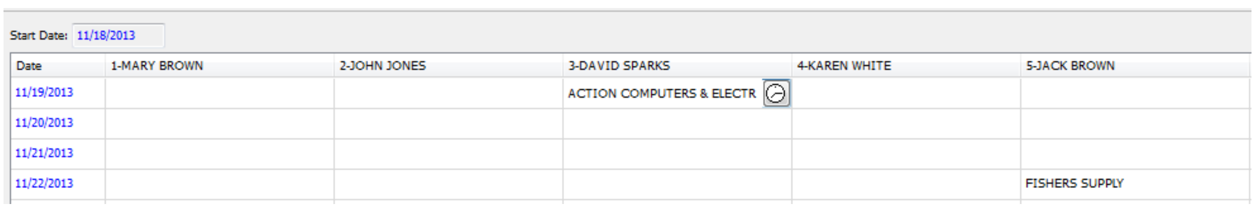

on the toolbar to view the calendar

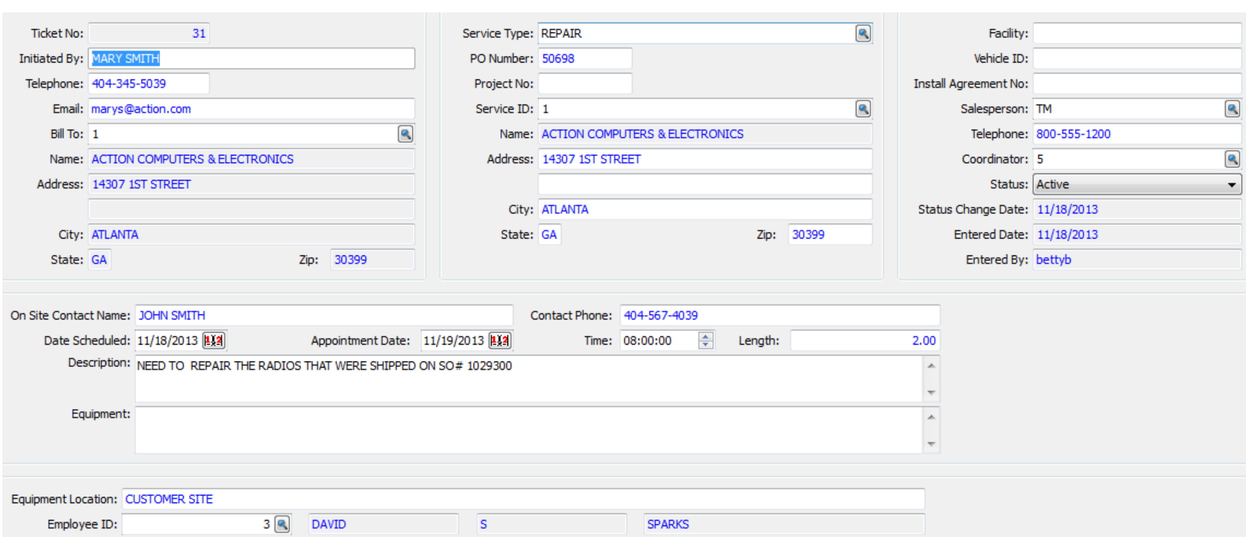



To view details about the appoints that are displayed on the calendar click the 

button on the toolbar.

Next click on the cell the appointment is listed in and then click on the "clock" icon to view the appointment screen. You can make changes to the appointment if needed.



**Copying Appointments**

If you want to create an appointment from an existing appointment, find the existing appointment and then click on the Copy Appt button on the toolbar. You will then need to change the date, time, or employee so that the newly created apppointment does not conflict with the appointment it was created from.

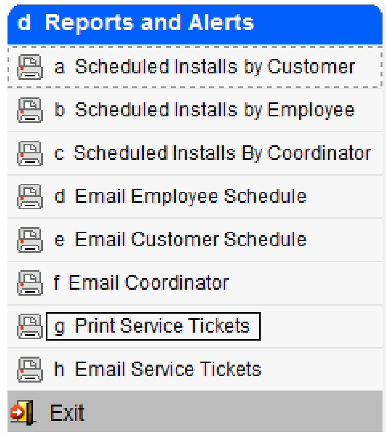
**Printing or Emailing the Service Ticket**

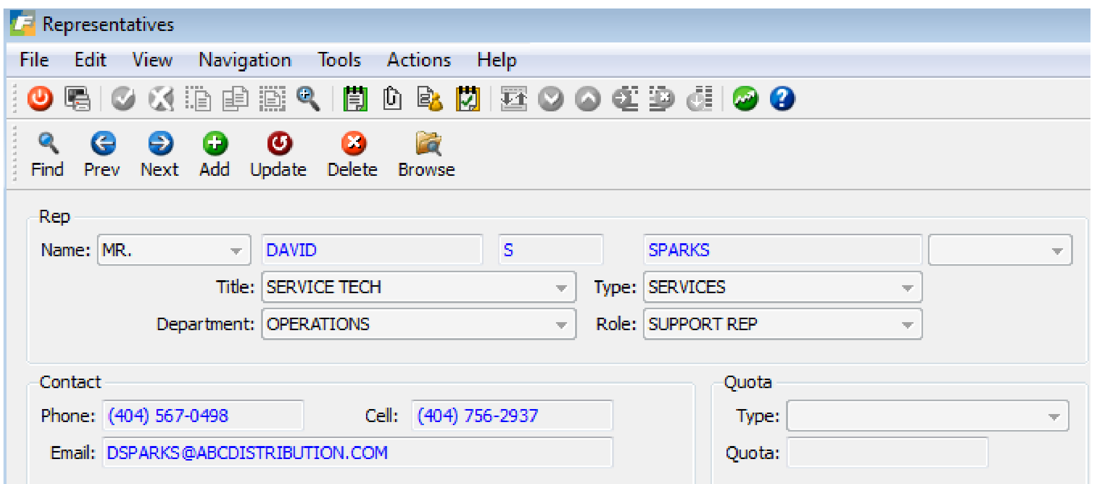
After you have entered and saved the apointment you can print the service ticket by clicking on the Service Ticket button on the Appointments screen toolbar.

Here is a sample of the service ticket

| | | | | | |
|---|---|---|---|---|---|
| Ticket No | 31 | Employee ID | 3 | Service Type | REPAIR |
| Service ID | 1 | Bill to ID | 1 | PO No | 50698 |
| Appointment | 11/19/2013 08:00:00 | Status | Active | Project No | |
| Customer | ACTION COMPUTERS & ELECTRONICS<br>14307 1ST STREET<br><br>ATLANTA GA 30399 | | | Date Received | 11/18/2013 |
| | | | | Entered By | bettyb |
| Initiated By | MARY SMITH | | | Install Location | 14307 1ST STREET |
| On Site Contact | JOHN SMITH | | | Phone | 404-567-4039 |
| Description of Work to be Done | NEED TO REPAIR THE RADIOS THAT WERE SHIPPED ON SO# 1029300 | | | | |
| Equipment Needed | | | | | |

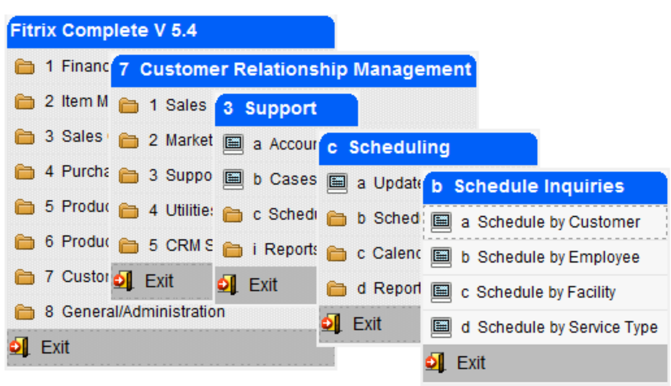
You can also print or email service tickets from the Reports and Alerts submenu using options (g) and (h)
The email address used for emails will be the employee's email address found in the Representatives table.




# Schedule Inquiries

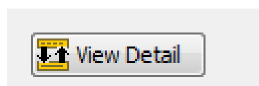
Run option (b) on the Scheduling submenu to run these programs.

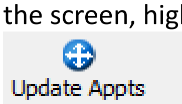


Appointments will continue to show up on both the inquiry screens and calendars until their status is changed to either cancelled or completed.

### Schedule By Customer

To find appointments by customer do a Find and enter the customer code and date range. There is a lot of information on this screen so to view it all you will need to use the scroll bar located at the bottom of the screen

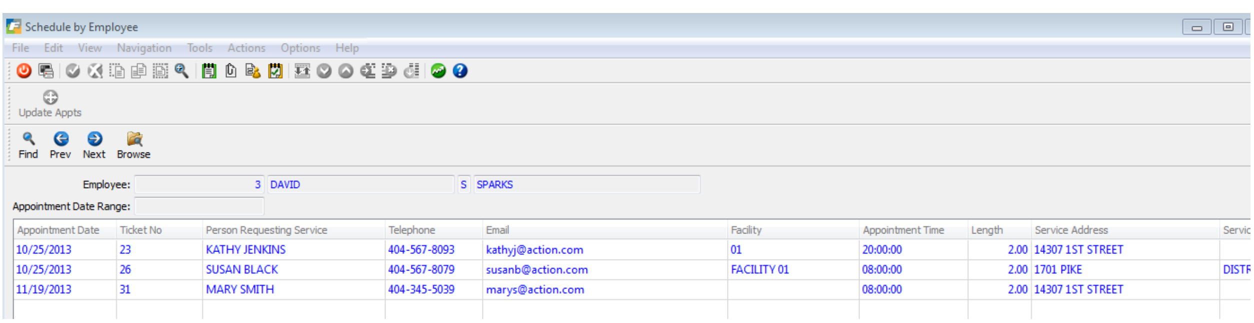

To drilldown to an appointment, click the 

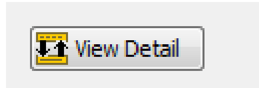
button located at the bottom of the screen, highlight the appointment you want to view and then click on the 

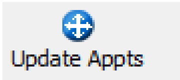
button on the toolbar to launch the appointment screen. You can make changes to the appointment if needed.

### Schedule By Employee

To find appointments by employee do a Find and enter the employee ID or name and date range. There is a lot of information on this screen so to view it all you will need to use the scroll bar located at the bottom of the screen



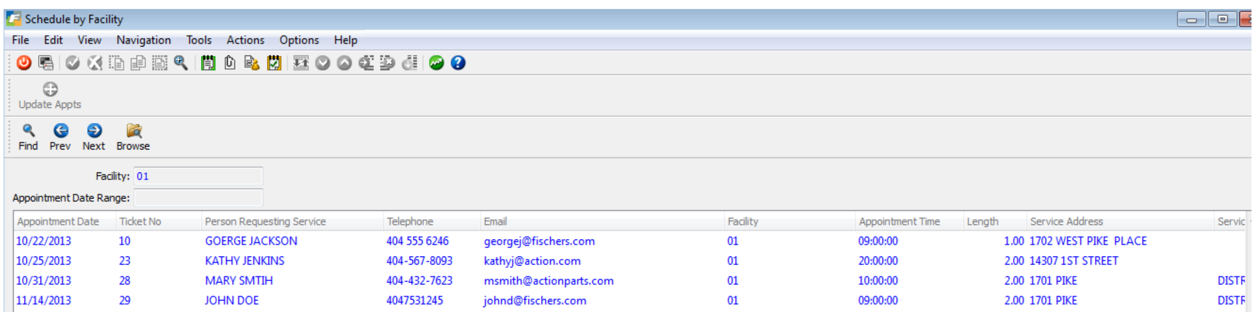
To drilldown to an appointment, click the 

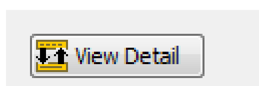
button located at the bottom of the screen, highlight the appointment you want to view and then click on the 

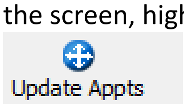
button on the toolbar to lanuch the appointment screen. You can make changes to the appointment if needed.

**Schedule By Facility**

To find appointments by facility do a Find and enter the facility code and date range. There is a lot of information on this screen so to view it all you will need to use the scroll bar located at the bottom of the screen



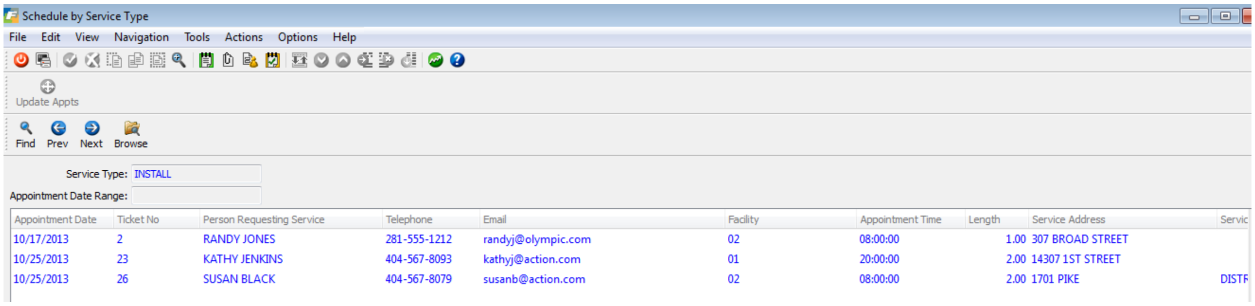

To drilldown to an appointment, click the 

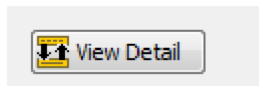
button located at the bottom of the screen, highlight the appointment you want to view and then click on the 

button on the toolbar to lanuch the appointment screen. You can make changes to the appointment if needed.

**Schedule By Service Type**

To find appointments by service type do a Find and enter the service type and date range. There is a lot of information on this screen so to view it all you will need to use the scroll bar located at the bottom of the screen



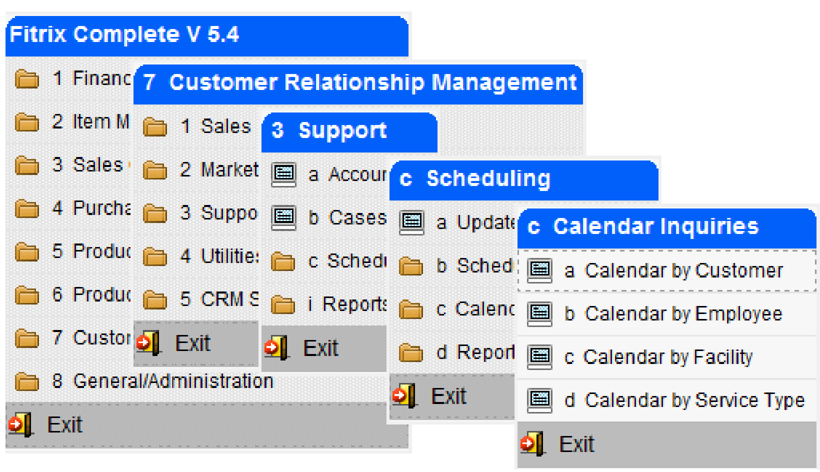

To drilldown to an appointment, click the 

button and the bottom of the screen, highlight the appointment you want to view and then click on the 

button on the toolbar to lanuch the appointment screen. You can make changes to the appointment if needed.

# Calendar Inquiries

Run option (c) on the Scheduling submenu to run these programs.

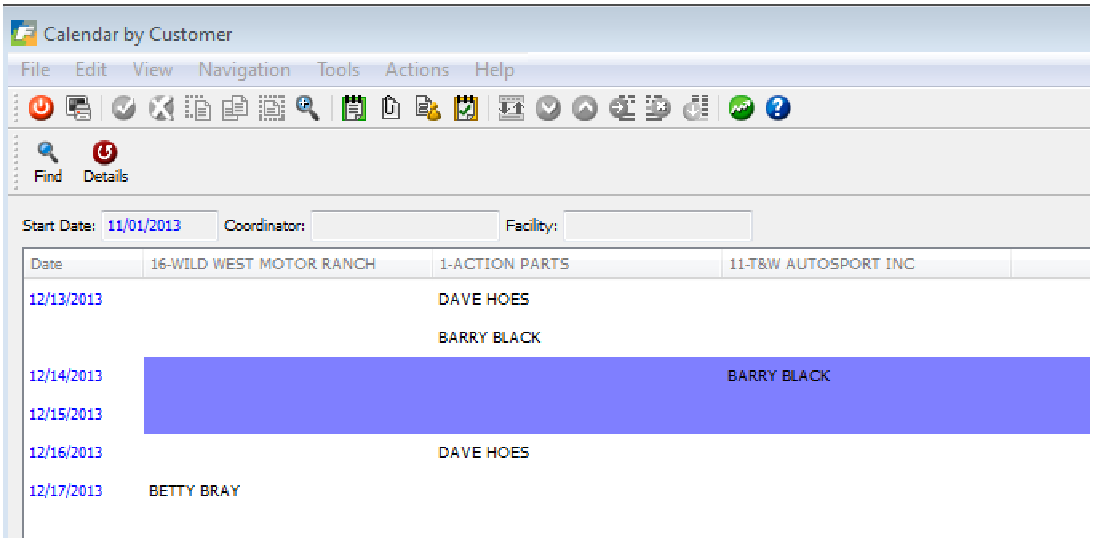



Appointments will continue to show up on both the inquiry screens and calendars until their status is changed to either cancelled or completed.

### Calendar by Customer

To find appointments by customer do a Find and enter the start date. If you also need to filter appointments by coordinator and/or facility enter values in those fields too.

The program will find all active appointments where the appointment date is equal to or greater than the start date entered. Depending upon the number of customers that have appointments scheduled you may need to use the scroll bar or the Previous Customer and Next Customer buttons located at the bottom of the screen to view them all.



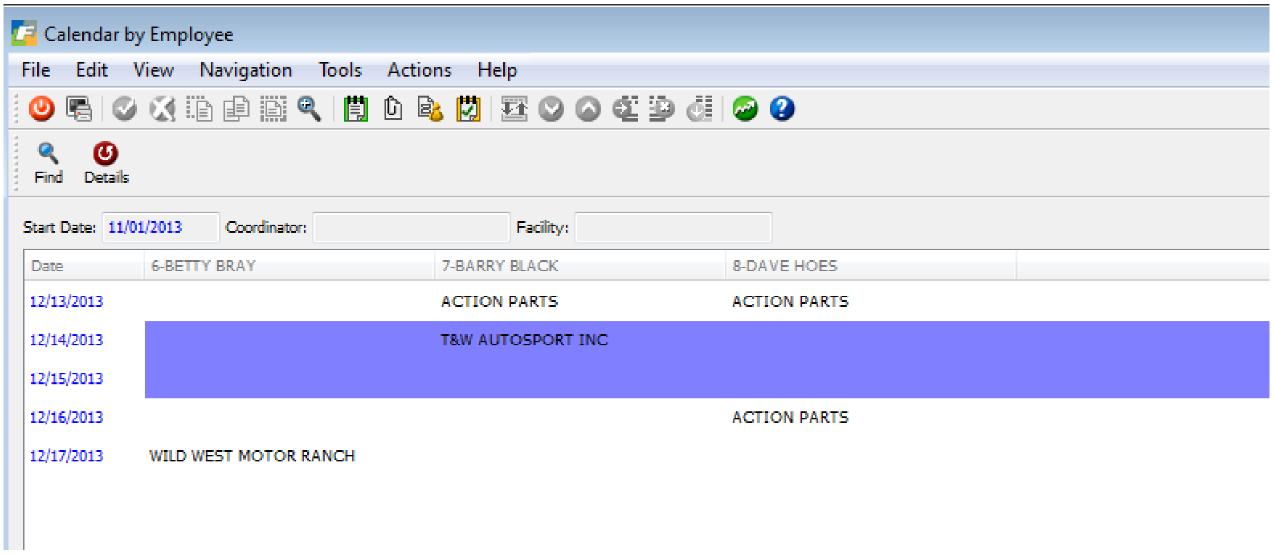

To drilldown to an appointment, click on the 

button on the toolbar and then click on the cell the appointment is located in. Next click on the  icon in the cell to launch the appointment screen. You can make changes to the appointment if needed.

**Calendar by Employee**

To find appointments by employee do a Find and enter the start date. If you also need to filter appointments by coordinator and/or facility enter values in those fields too.

The program will find all active appointments where the appointment date is equal to or greater than the start date entered. Depending upon the number of employees that have appointments scheduled you may need to use the scroll bar or the Previous Employee and Next Employee buttons located at the bottom of the screen to view them all.



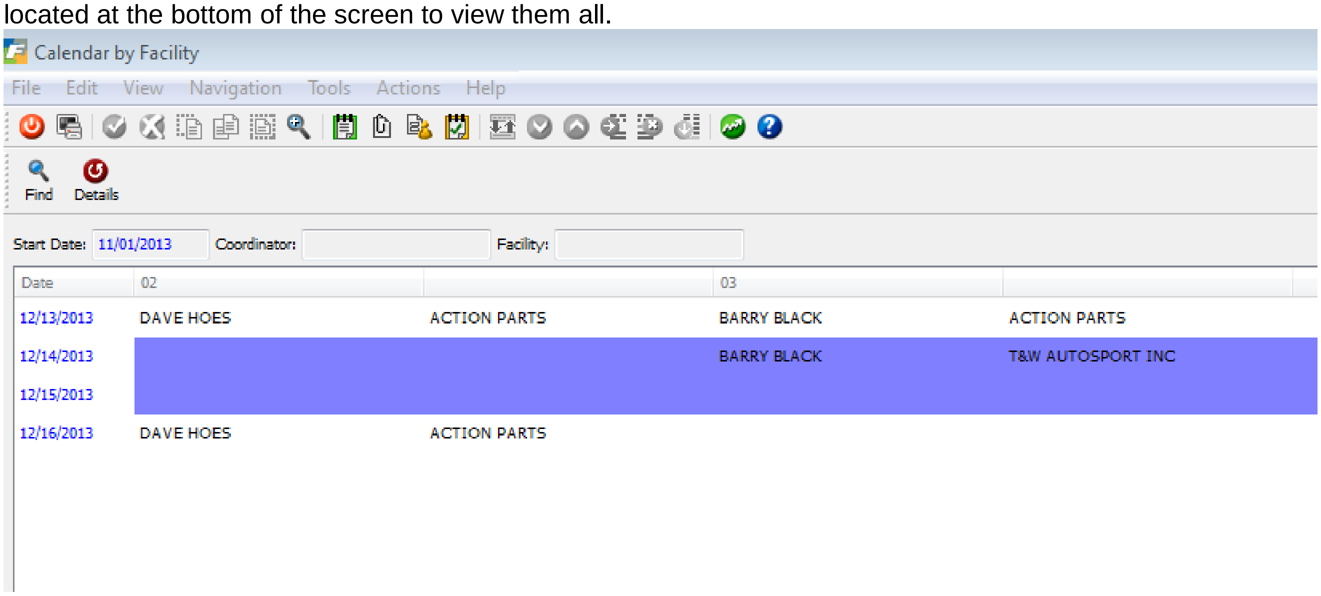

To drilldown to an appointment, click on the 

button on the toolbar and then click on the cell the appointment is located in. Next click on the  icon in the cell to launch the appointment screen. You can make changes to the appointment if needed.

**Calendar by Facility**

To find appointments by facility do a Find and enter the start date. If you also need to filter appointments by coordinator and/or facility enter values in those fields too.

The program will find all active appointments where the appointment date is equal to or greater than the start date entered. Depending upon the number of facilities that have appointments scheduled you may need to use the scroll bar or the Previous Facility and Next Facility buttons located at the bottom of the screen to view them all.

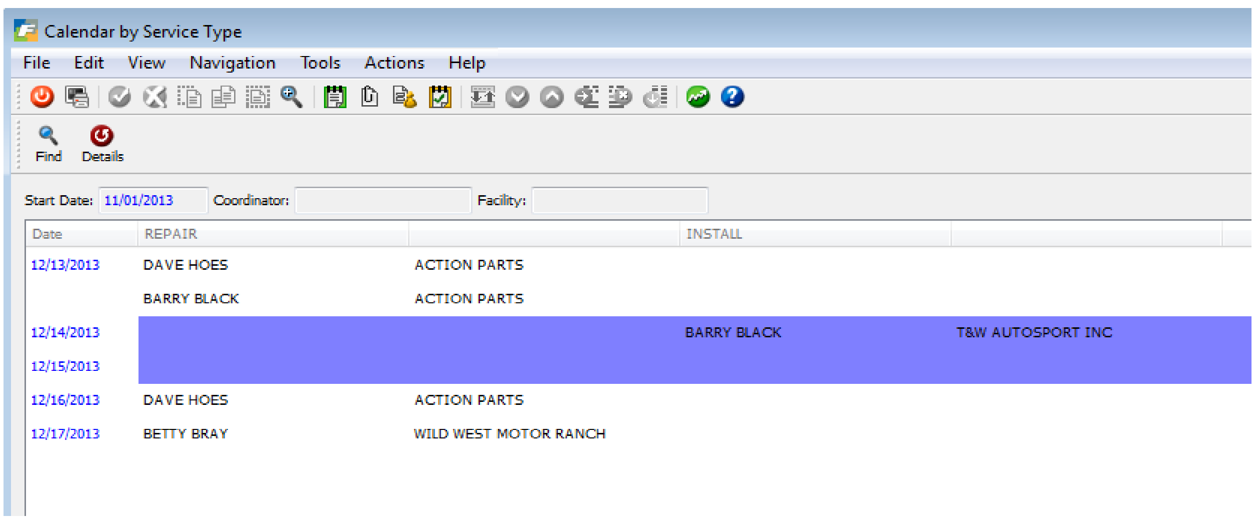


To drilldown to an appointment, click on the Details button on the toolbar and then click on the cell the appointment is located in. Next click on the icon in the cell to launch the appointment screen. You can make changes to the appointment if needed.

**Calendar by Service Type**

To find appointments by service type do a Find and enter the start date. If you also need to filter appointments by coordinator and/or facility enter values in those fields too.

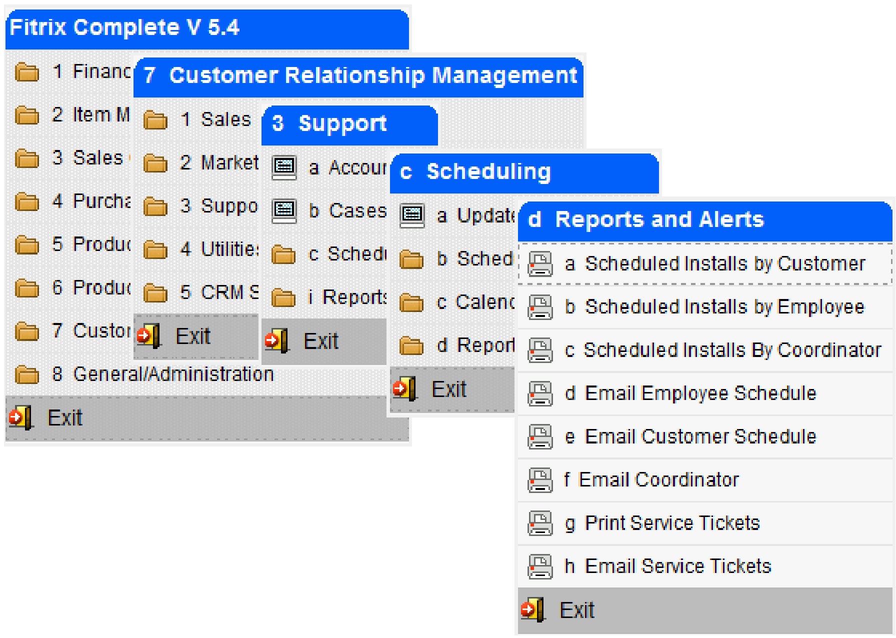
he program will find all active appointments where the appointment date is equal to or greater than the start date entered. Depending upon the number of service types that have appointments scheduled you may need to use the scroll bar or the Previous Type and Next Type buttons located at the bottom of the screen to view them all.




To drilldown to an appointment, click on the Details button on the toolbar and then click on the cell the appointment is located in. Next click on the icon in the cell to launch the appointment screen. You can make changes to the appointment if needed.

# Scheduling Reports and Alerts

Run option (d) on the Scheduling submenu to run these programs.




**Scheduled Installs by Customer**

Run this report to see installs by customer. This report can also be exported to Excel

**Scheduled Installs by Employee**

Run this report to see installs by employee. This report can also be exported to Excel

**Scheduled Installs by Coordinator**

Run this report to see installs by service coordinator. This report can also be exported to Excel

**Email Employee Schedule**

This program will email the Scheduled Installs by Employe report to your employee using the email address entered when setting up the employee as a representative.

**Email Customer Schedule**

This program will email the Scheduled Installs by Customer report to your customer using the email address entered when setting up the appointment.

**Email Coordinator Schedule**

This program will email the Scheduled Installs by Coordinator report to your service coordinator using the email address entered when setting up the employee as a representative.

## Email Template Programs

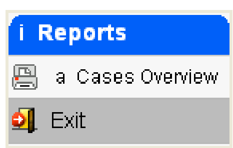
The email alerts discussed above are set up using the Email Template program accessed using option (k) on the Company Setup submenu.

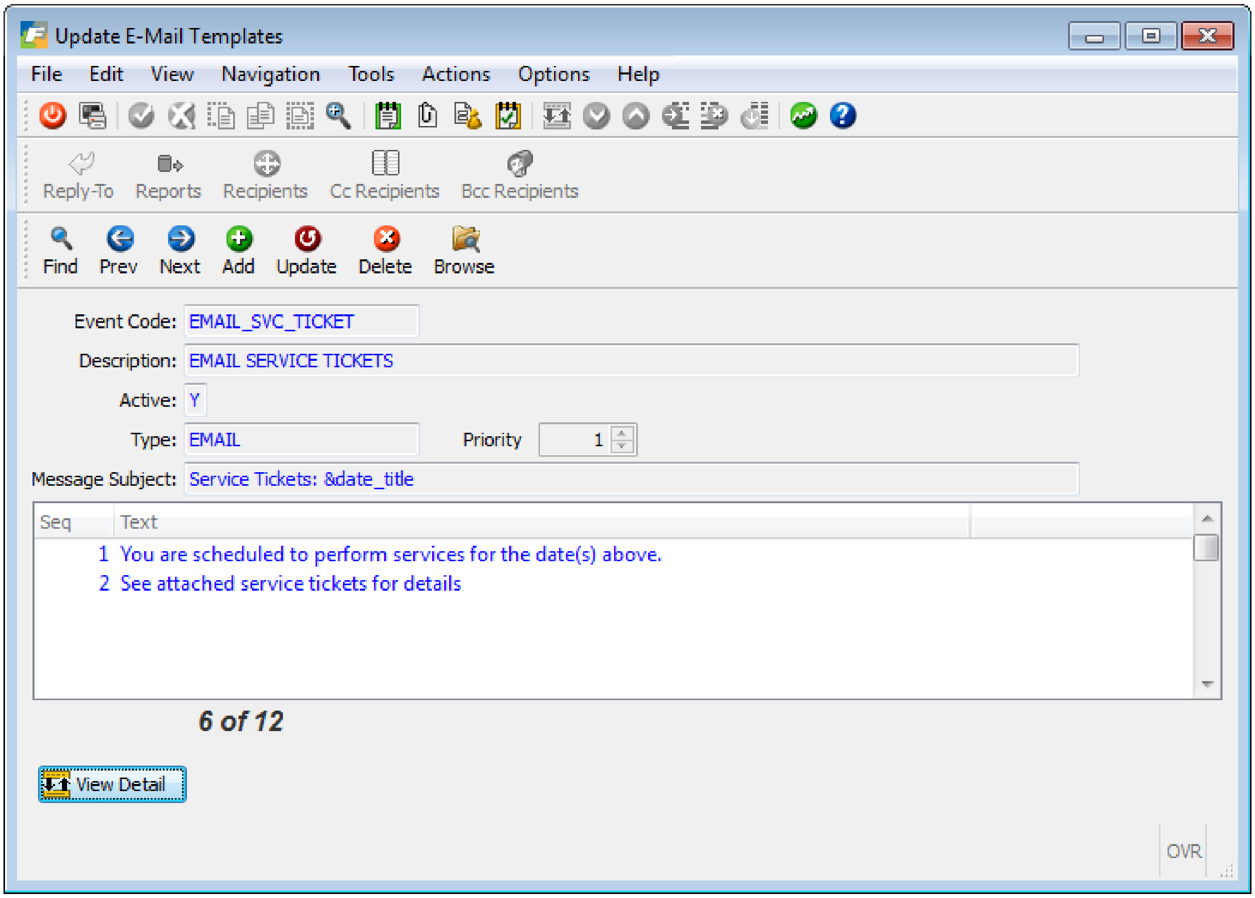
If you would like to change the text that prints in the body of the email you can do that here. You can also optionally set up cc and bcc recipients or a reply to email address for any emailed reports as needed.

Here is the template for the service ticket.

## Support Reports

Fitrix CRM comes with the following support reports:






# Lab Exercises

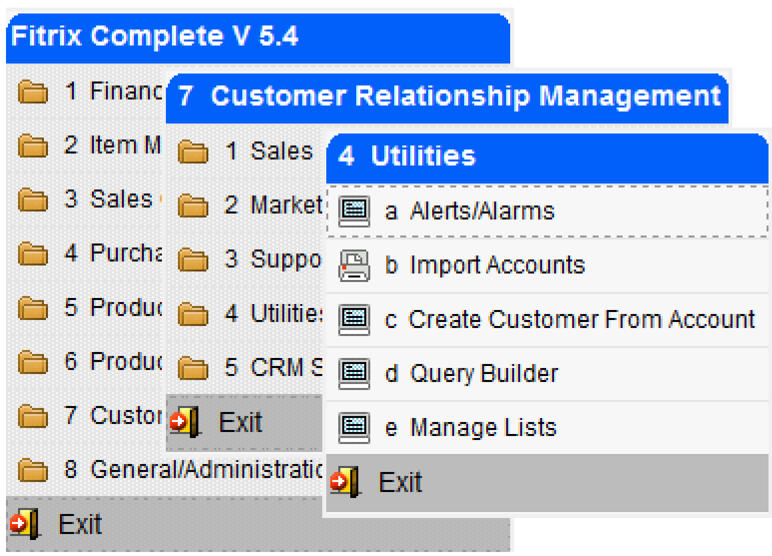
1. Add a support case for the account you set up for your company. The type is SERVICES and you want them to replace a bad engine you were sent. You need the replacement quickly so it is a high priority. Pick any rep and dispatch it today. The part you need replaced is GM366250.
2. Set up an appointment to have a tech come out and pick up the bad part in #1 and drop off the new part. They'll do this tomorrow at 9 am and it will take them an hour with travel time.
3. Run all schedule and calendar programs to see the appt set up in #2.

For the tech you selected in #1 change their email address to yours using the Representatives program on the set up menu. Then email that tech the schedule and service ticket and they will both be delivered to your email address.

# Chapter 6 – Utilities

This chapter covers the following topics:

- Alerts/Alarms
- Import Accounts
- Create Customer from Account
- Query Builder
- Managing lists



# Alerts/Alarms

The Alerts/Alarms are used to set up reminders for each user. The reminder can be tied to an activity or not tied to an activity.

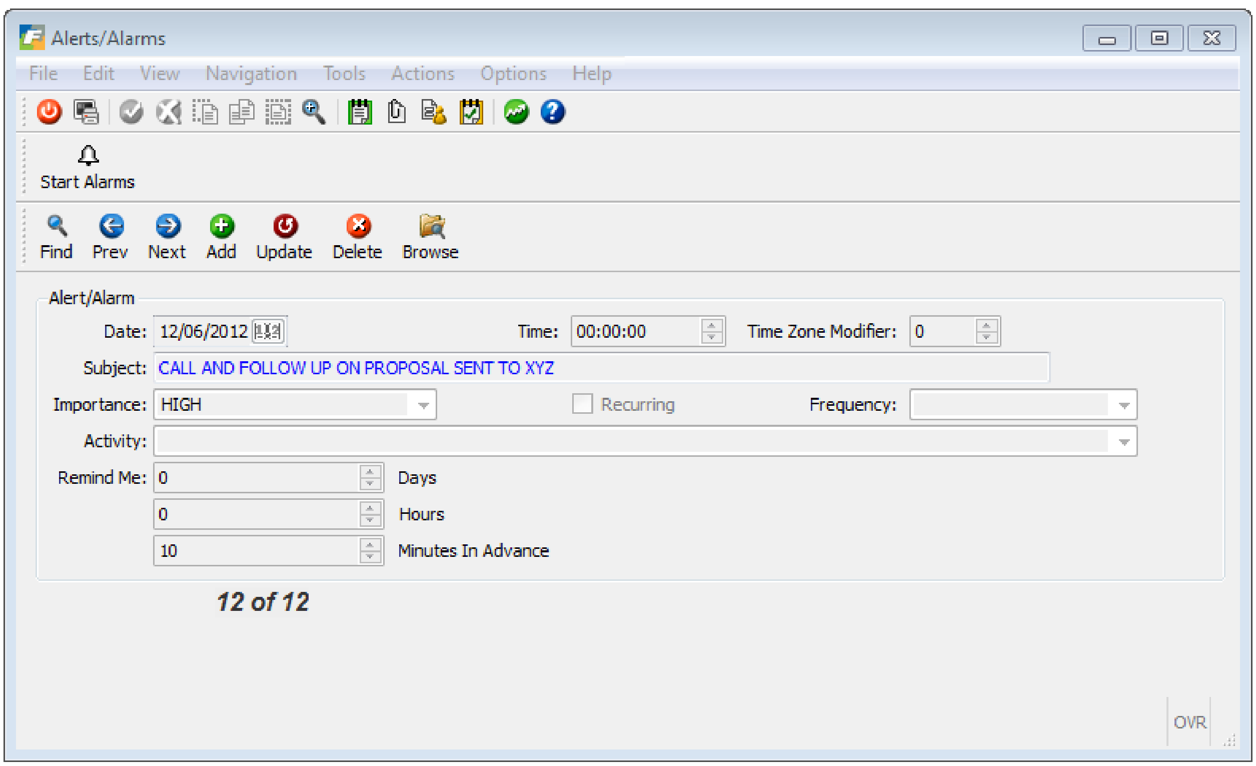
Alerts can be turned on one of two ways:

- Click on the 

 button on the Alerts screen.
- Launch the Activities program from the Sales menu.

In a future release of Fitrix CRM the Alerts will be turned on automatically when the user logs in.

Alerts are set up by checking the reminder box when setting up activities or directly using the Alerts screen program shown here.



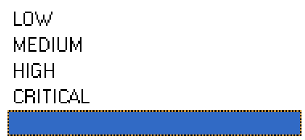
**Date** – enter the date you want to receive the alert.

**Time**- enter the time you want to receive the alert.

**Time Zone Modifier** – this is used if the user is in a different time zone than the Company's server. For example, if the user is on the West coast, and the server on the East coast, the user would enter "-3" for their modifier .

**Subject** – subject line for your alert.

**Importance** – choices include:

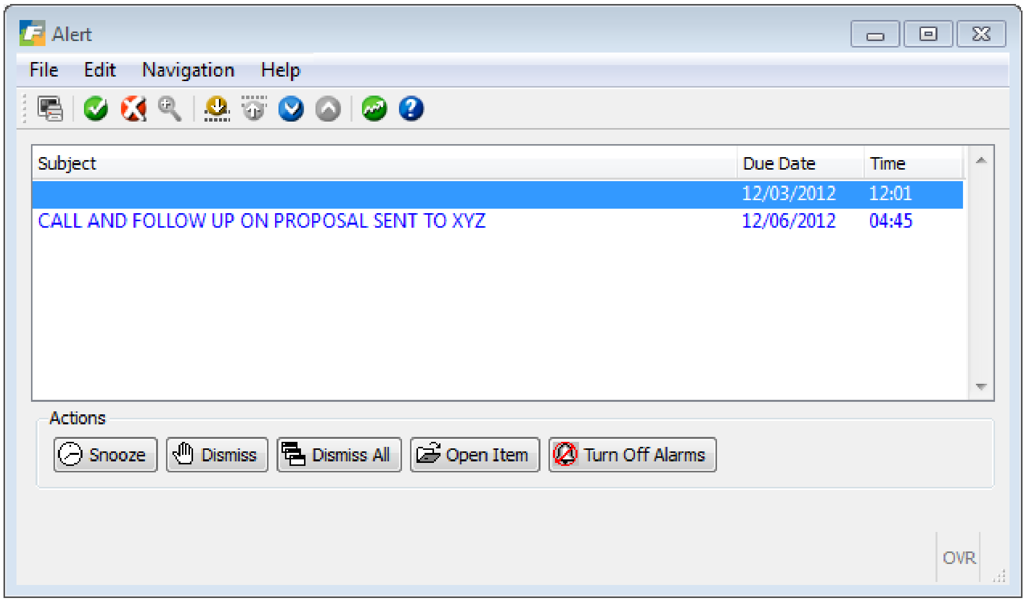



**Recurring**- check this box if this is a recurring alert (ie- every week).

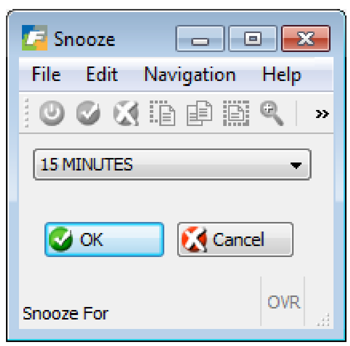
**Frequency** – displays the frequency codes you have set up using the Frequency of Occurrence program on the Set Up menu.

**Activity** – select an activity this alert is tied to or leave blank if it is not tied to an activity

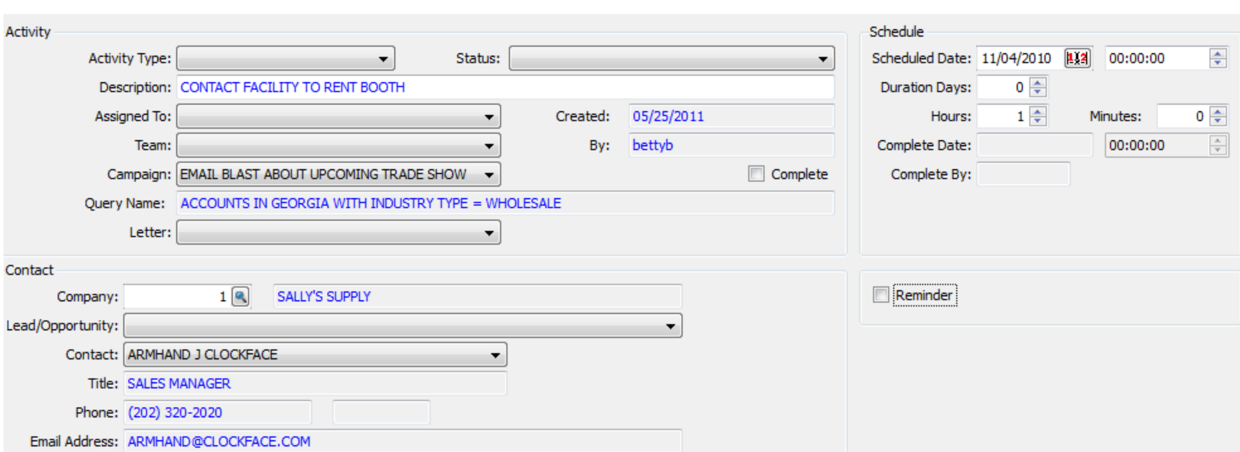
**Remind Me** – select the days, hours, or minutes in advance of the alert time you want to be reminded. When the time is met this alert screen will display:




If snooze is selected you will receive this prompt:




You can also set up alerts when entering activities by checking the reminder box.

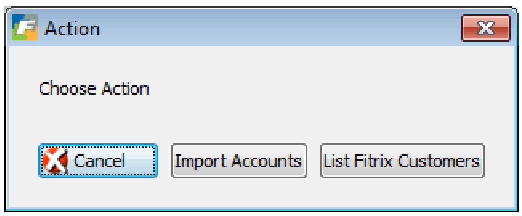


When this box is checked you can then enter the importance and the amount of time in advance of the activity's time you want to receive a reminder alert.

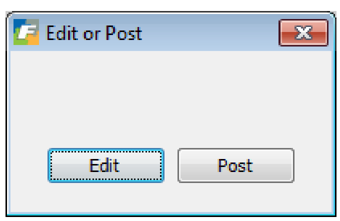
# Import Accounts

Use this program to import your customers into the Fitrix CRM tables from an outside source/software. If your customers are already in the Fitrix database, use this program to create a spreadsheet of customers to be imported into the CRM tables and then import them. **NOTE: make sure there are no spaces in the Excel filename. If there are or you will receive an error when you try to import.**

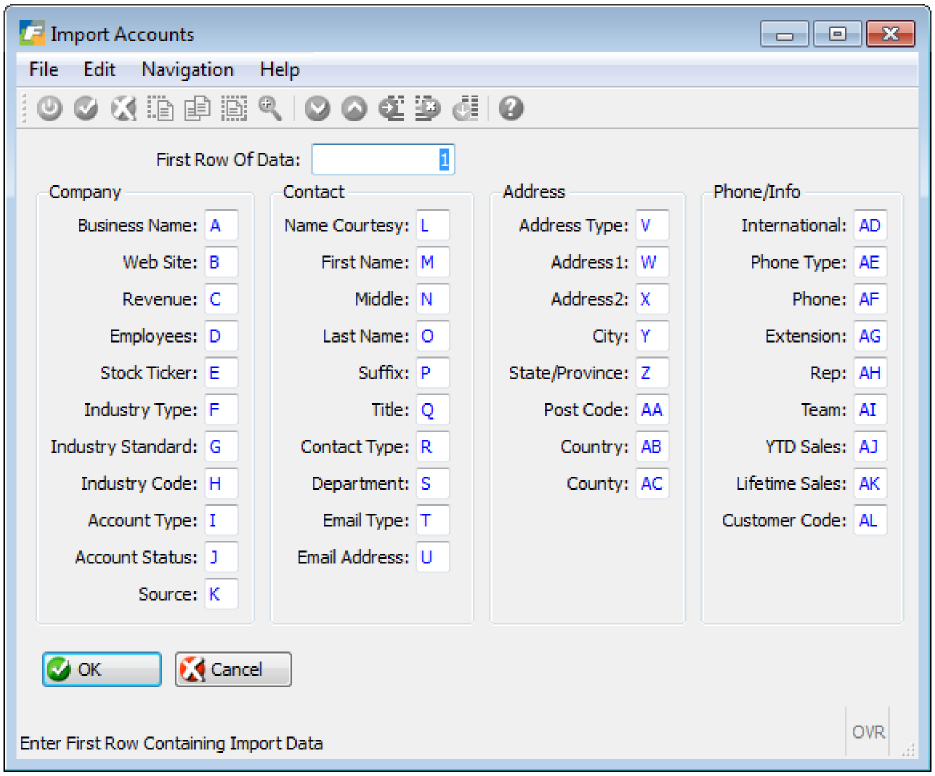
The first prompt you receive is this:




**Import Accounts**- this option will import a list of Accounts from a predefined list. The next prompt is this:



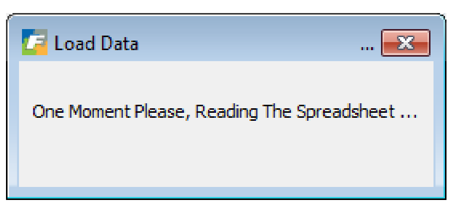

Run the program first in edit mode so that you may map the data in your list to the matching values on the Accounts screen. Once you select edit and select your Excel list from where it is stored on your system (the spreadsheet will open and do not close it) you will see this mapping screen:



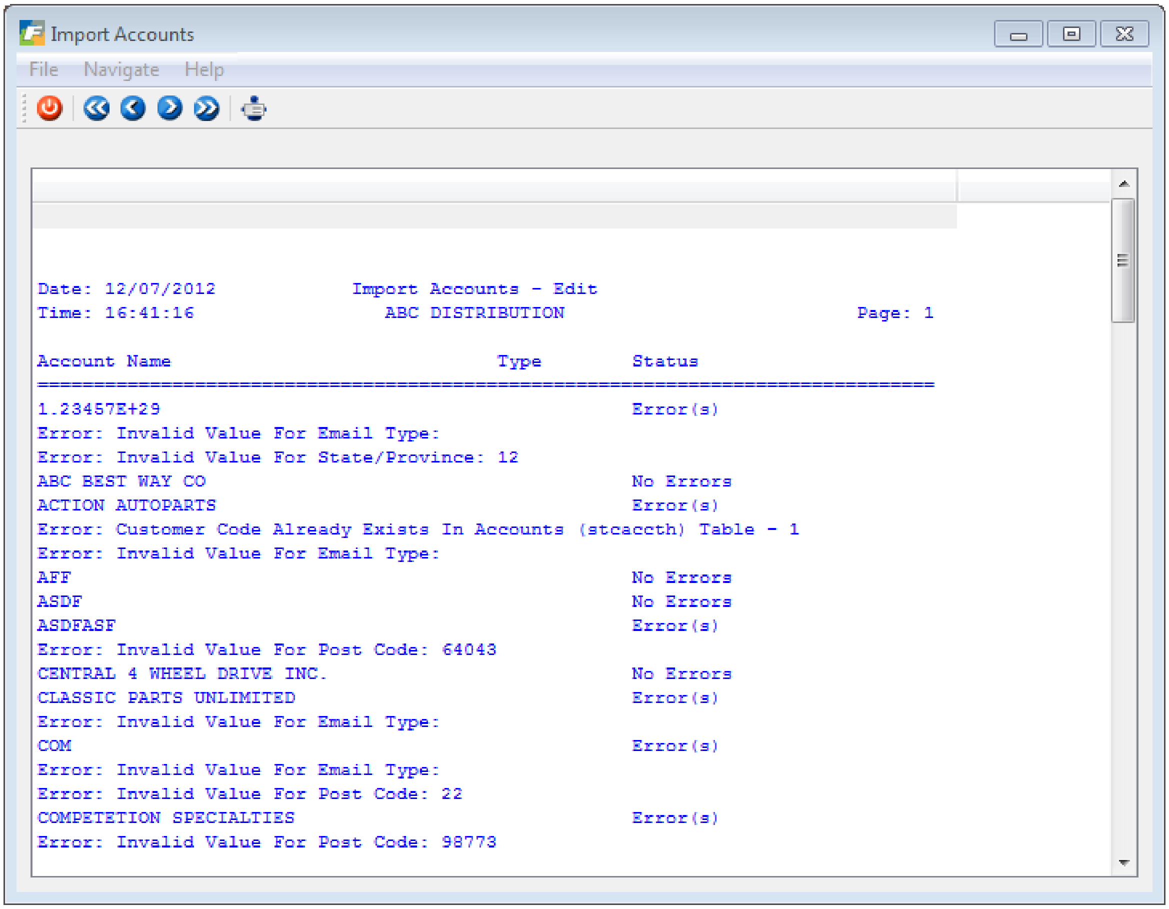

**First Row of Data**- change this if the first row on your spreadsheet is not data. For example your first row may be column headings so you would change this value to 2.

**Column Mapping** – in the above example it is assumed that column A of your spreadsheet is the Business Name. If it is not, change it and all other values to their appropriate column. Once done, click OK to begin the data load.

You will receive this message:




If there are any errors in the data, an error listing will display:




```
Date: 12/07/2012           Import Accounts - Edit
Time: 16:41:16                ABC DISTRIBUTION                           Page: 1

Account Name                              Type        Status
================================================================================
1.23457E+29                                           Error(s)
Error: Invalid Value For Email Type:
Error: Invalid Value For State/Province: 12
ABC BEST WAY CO                                       No Errors
ACTION AUTOPARTS                                      Error(s)
Error: Customer Code Already Exists In Accounts (stcaccth) Table - 1
Error: Invalid Value For Email Type:
AFF                                                   No Errors
ASDF                                                  No Errors
ASDFASF                                               Error(s)
Error: Invalid Value For Post Code: 64043
CENTRAL 4 WHEEL DRIVE INC.                            No Errors
CLASSIC PARTS UNLIMITED                               Error(s)
Error: Invalid Value For Email Type:
COM                                                   Error(s)
Error: Invalid Value For Email Type:
Error: Invalid Value For Post Code: 22
COMPETETION SPECIALTIES                               Error(s)
Error: Invalid Value For Post Code: 98773
```

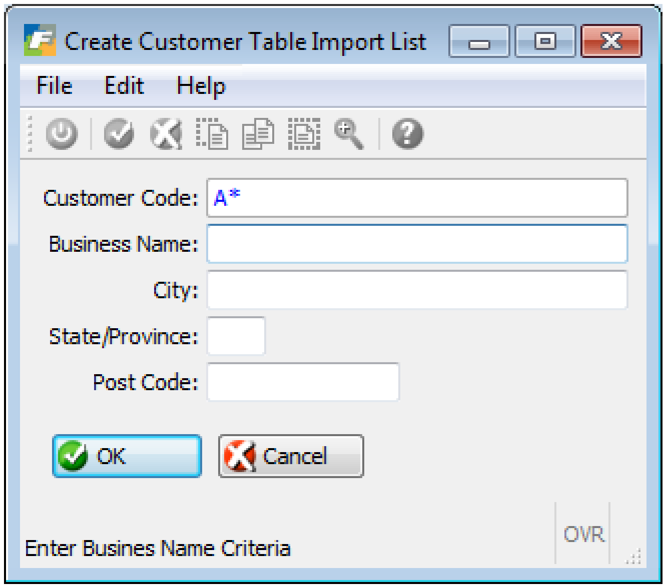
You should then fix your list, run the edit again to verify it is fixed, and then run the post.

**NOTE:** The following values are mandatory when setting up accounts and therefore need to be included on your spreadsheet when importing accounts:

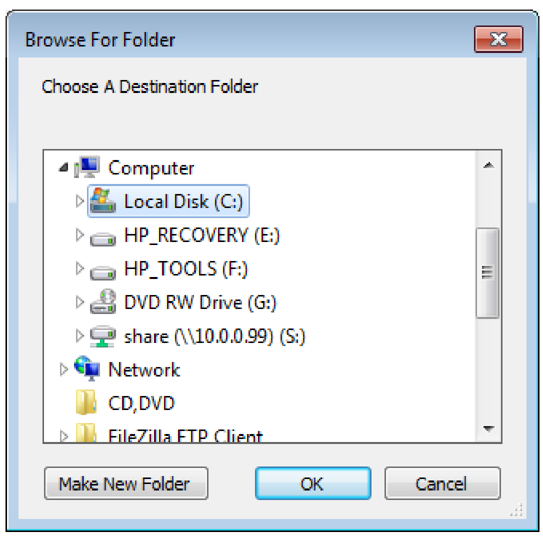
Business Name
Address Type (i.e.- office, home, etc..)
Address1
City, State or Province, zip or post code
Account Type
Account Status
Rep ID

**List Fitrix Customers**- this option will create an Excel spreadsheet of all customers that are currently in the Fitrix database that you can then update as needed before importing.

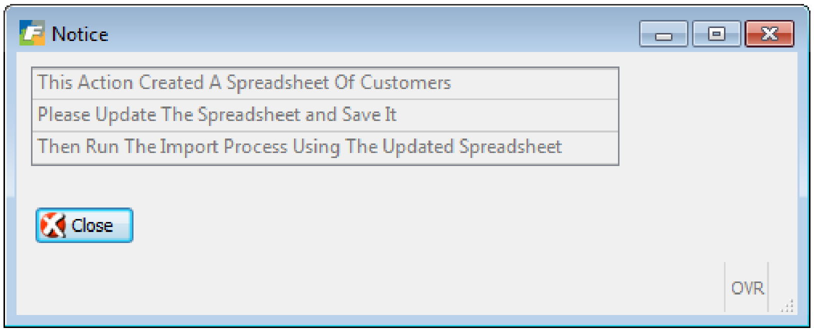
When you select this option this screen displays so you can narrow down the number of customers if you need to.




You will then be prompted for where you want to save the spreadsheet:



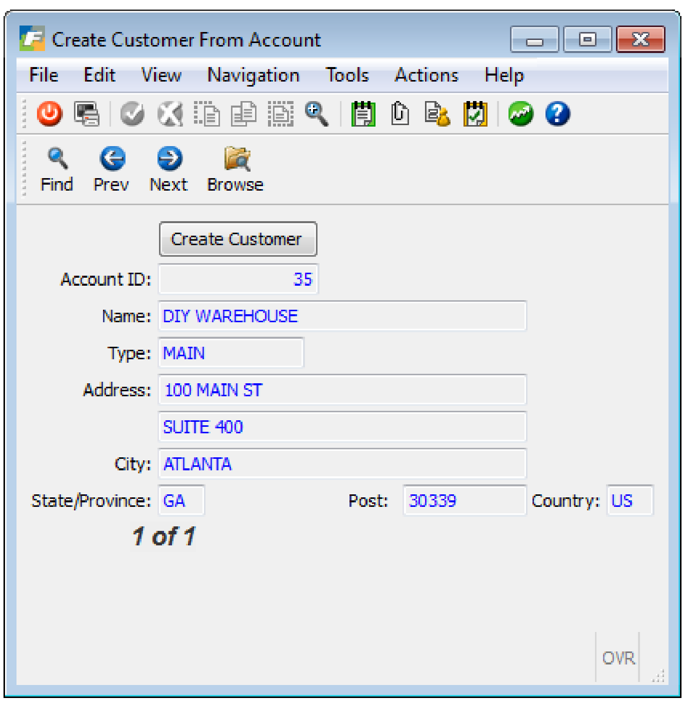

The Excel spreadsheet is created and you will receive this prompt:



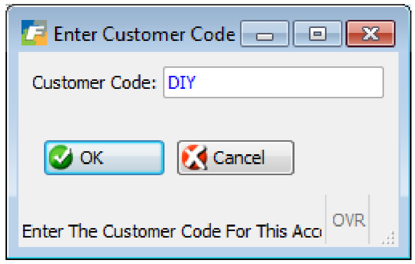

There is quite a bit of information included on the Accounts screen (ie- annual revenues, industry type, etc.) that is not in the customer master table. You can either update the spreadsheet with this information prior to running the import program or you can run the import and update this information using the Accounts screen. Once your list is finalized you use the Import List option discussed above to import your customers. The only difference is that the column mapping has already been done by the program so the only value that needs to be changed on this screen the First Row of Data should be changed from 1 to 2.

## Create Customer from Account

Use this program to turn an Account into a Customer so that you may begin processing orders.

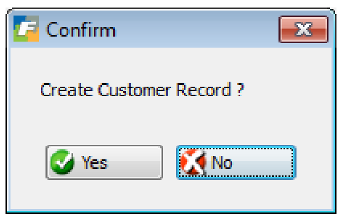


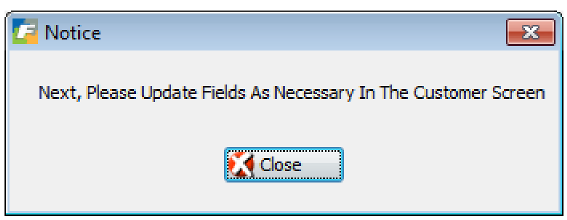
Use the Find option to find your Account and click on Create Customer. You will them be prompted to enter a customer code for this Account.




After you have entered the customer code you will be prompted to enter additional information that is needed by the Customer Master program or choose values if there is more than one to select from ( i.e.- the account has multiple addresses so the program will prompt you to select the address to insert into the customer master table.

Now you are ready to create the customer record:



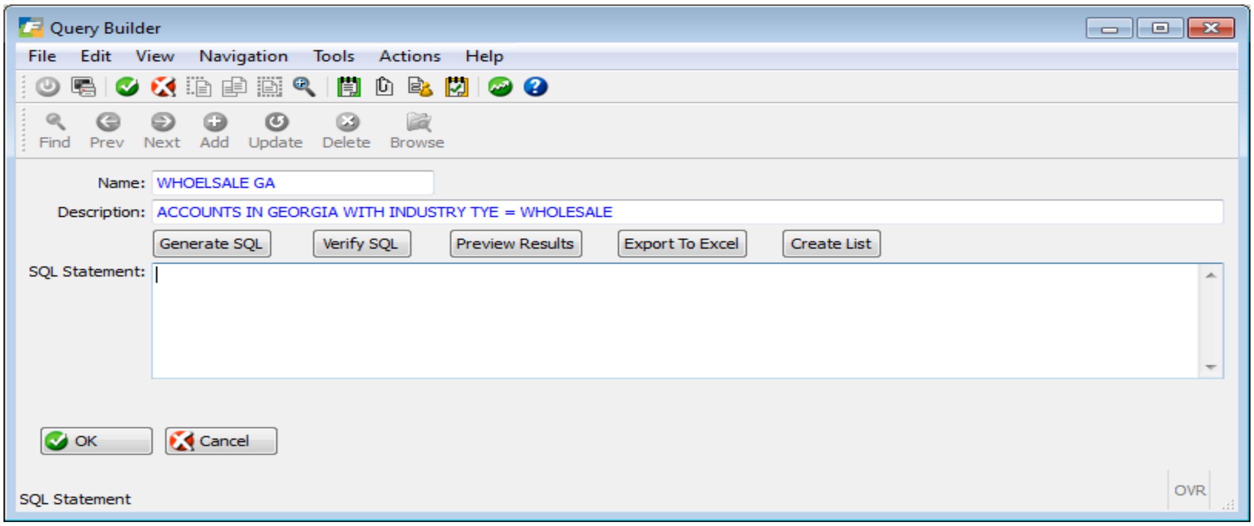

When you click OK the customer information screen will display so that you may enter additional information not included in Account information such as salesperson, payment terms, pay method, credit limit, etc.

# Query Builder

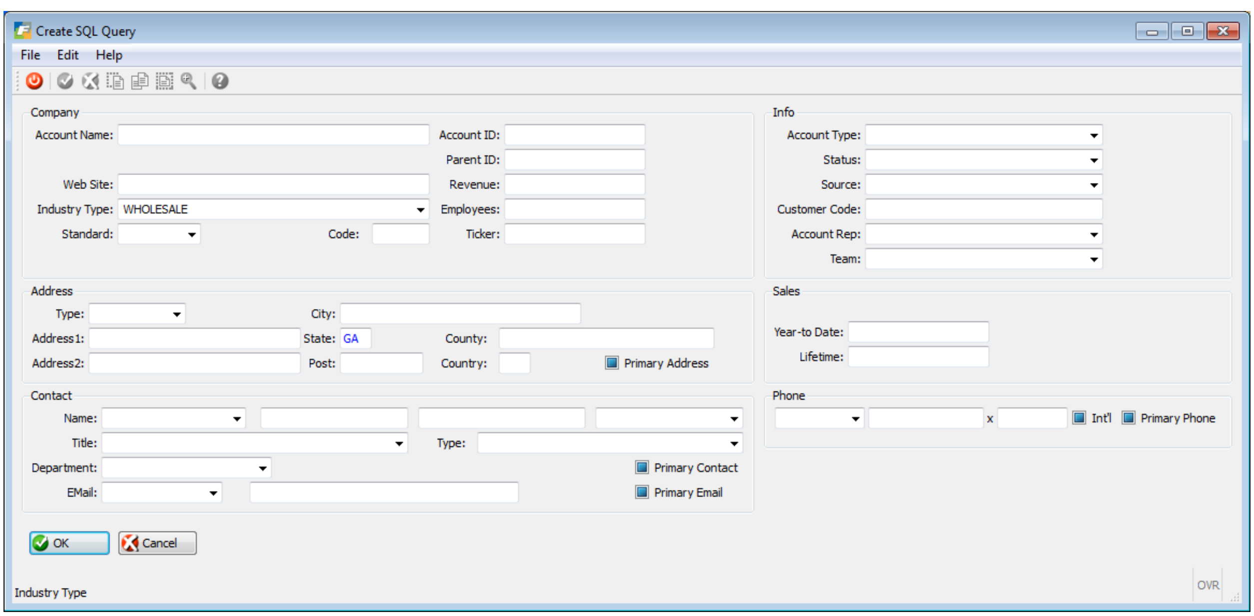
This powerful tool allows you to build SQL queries that create lists of Account/Customer contacts to be used in marketing campaigns.

In this example I want to build a list of contacts for all of my Accounts that are wholesalers.

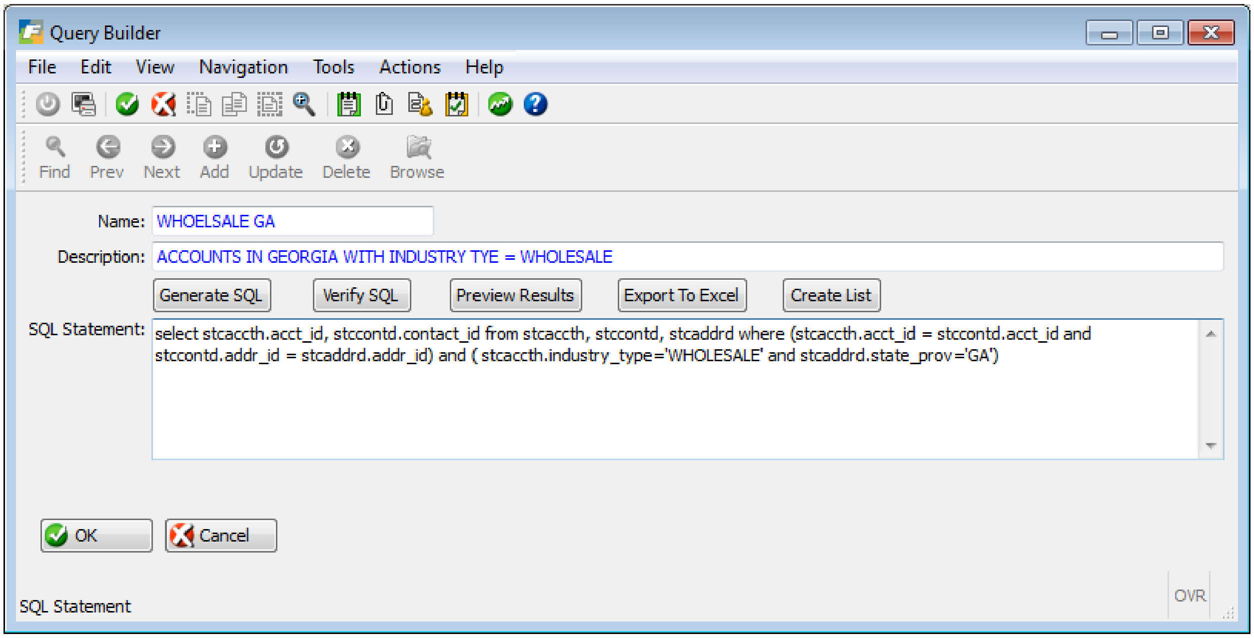
1. In Add mode, type in a name and description for your query.



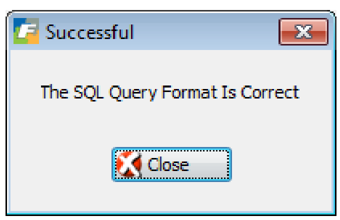

2. If you have a working knowledge of SQL you can then type in your query. If not click on the generate SQL button and this screen displays so that you can enter your selection criteria.



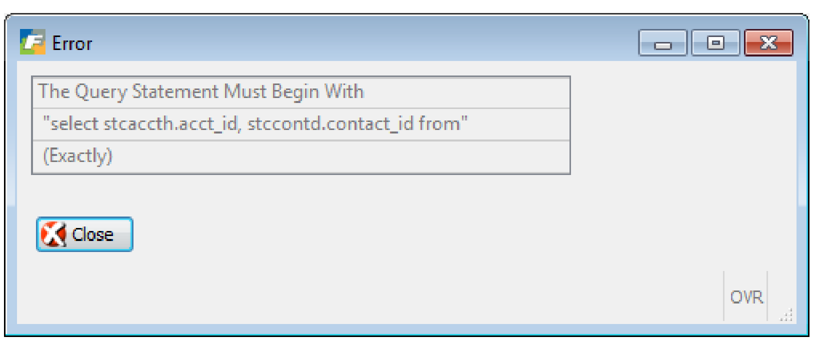
3. Click on the OK button to return to the previous screen and the SQL statement has been written for you.



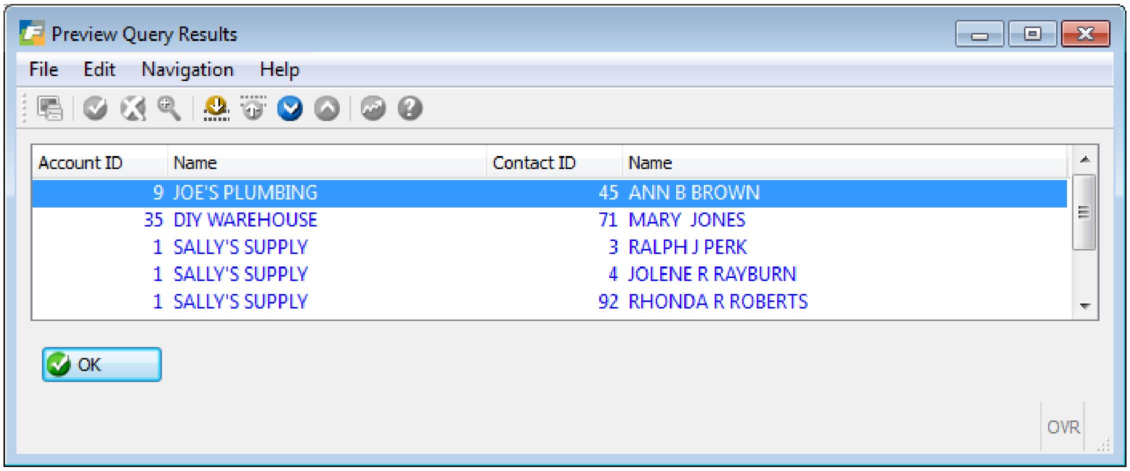

4. Click on the Verify SQL button to verify that correct SQL syntax was used. This is particularly helpful if you entered the SQL manually or revised the statement generated by the program. If correct syntax as been used you will received this message:




If it is not correct you will receive an error message:

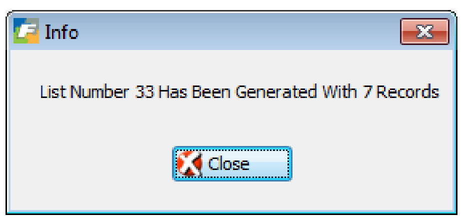


5. To review the results of the query click on the Preview Results button.



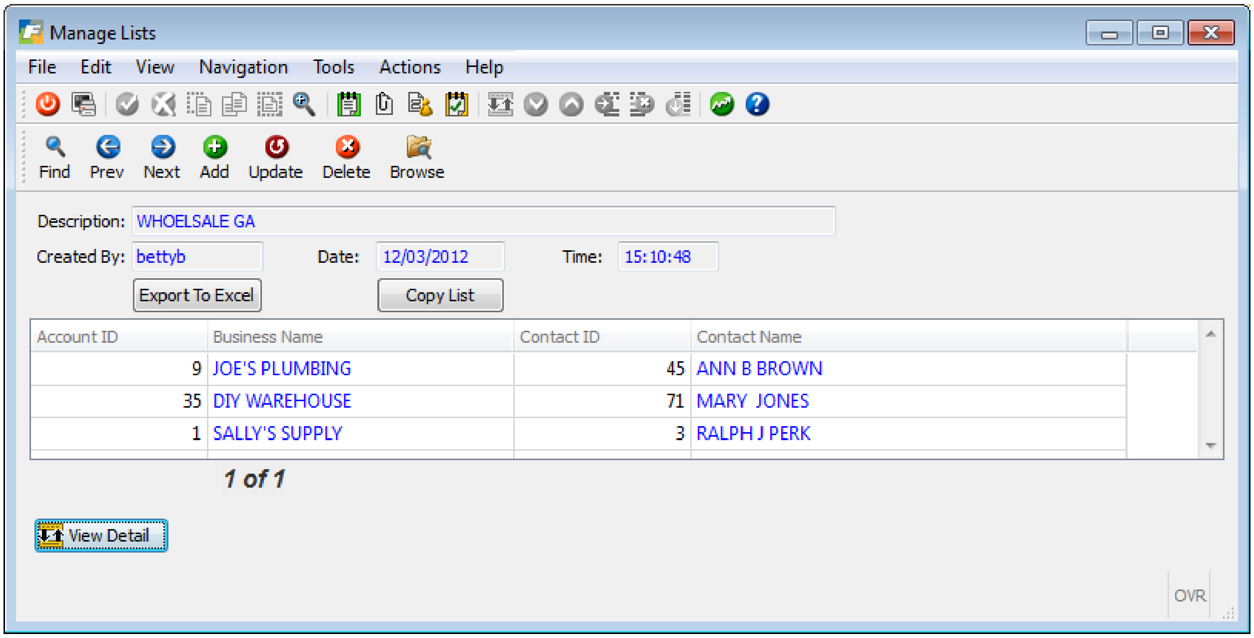

6. To export to Excel click on the Export to Excel button.

7. To create a static list that can be used in campaigns click on Create List button.

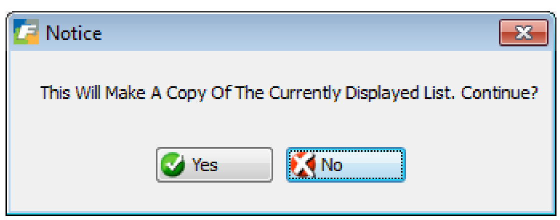


# Manage Lists

Use this program to review, update, or copy lists previously created by the Query Builder




If you click on the Copy List button you will receive this prompt:




If you select Yes the newly copied list will display on the screen. Its description will be that of the original list preceded by the words “COPY OF”.

# Lab Exercises

1. Find the alert you set up for your sales call and update it so you will be reminded 1 hour before the call instead of 30 minutes.
2. Create a customer record for the account you set up for your company. When prompted to enter information needed to set the account up as a customer like customer code, payment terms, etc. use your best judgment. If you have questions on any, contact your class instructor.
3. Go back to the main menu and then go to 1-2-2 Update Customer Information. Do a find on state GA. If there are records for this state go back to the CRM utilities menu and select Query Builder (option d). Go into Add mode.

    Name of query is GEORGIA
    Description " ALL ACCOUNTS IN GEORGIA"
    Click on Generate SQL, enter GA in state field, and click OK.
    Click on Verify SQL and then Close.
    Click on Preview Results and then OK.
    Click on Create List.

    If your search for customers in GA did not produce anything find a state that does have customers and use it instead of Georgia. Run the query steps 3a-3f using the state you've selected to use.

4. Go to Manage Lists and add another account to the one you created in #3 above.