Know your CRM better.

Explore the CRM modules:

- Leads
- Contacts
- Account
- Oppurtunity

Learn how to manage the modules.

- Create
- Export
- Import

Learn about Worflows and campaigns

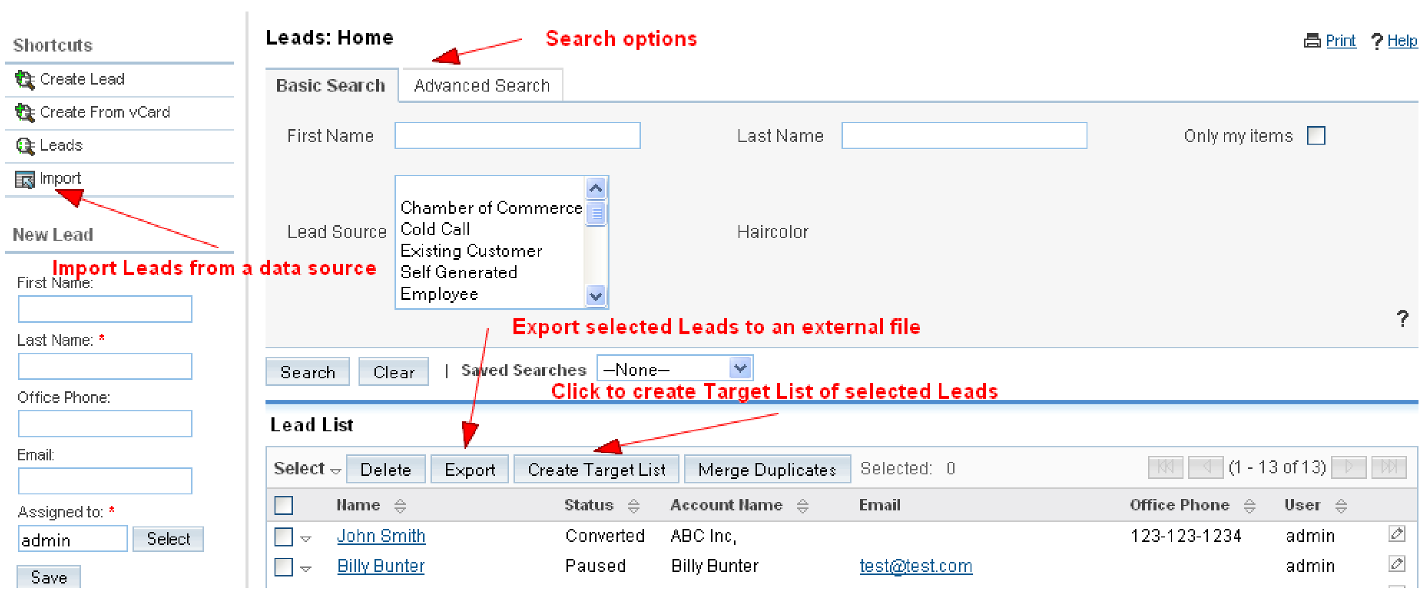
Main Features.

As we take you through the Modules while exploring the features that make the CRM easy to use.

- Shortcuts for easy access to the modules features
- Basic and advanced search options
- Export selected records
- Sort columns by clicking on the header

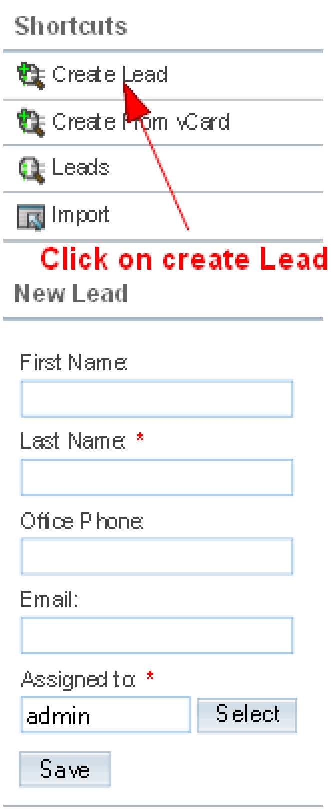
Leads Module

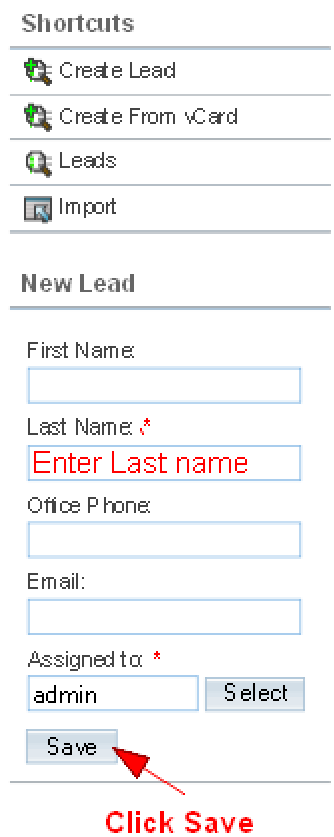
Leads are early contacts in the sales process. After they have been evaluated and assessed, you can convert them into contacts, opportunities, and accounts.
You can associate a lead with any type of campaign to track the effectiveness of the campaign in generating opportunities for your organization.



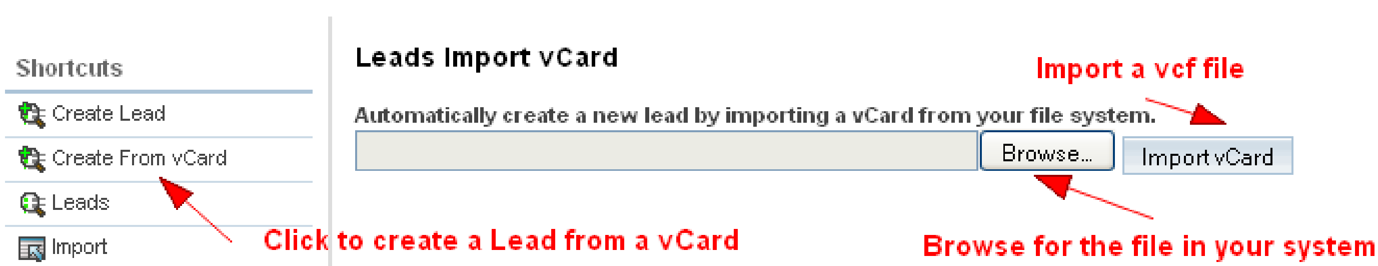
Create a new Lead

You can create Leads from shortcuts left panel, you can also import them from a comma delimited, tab delimited, or custom delimited file.



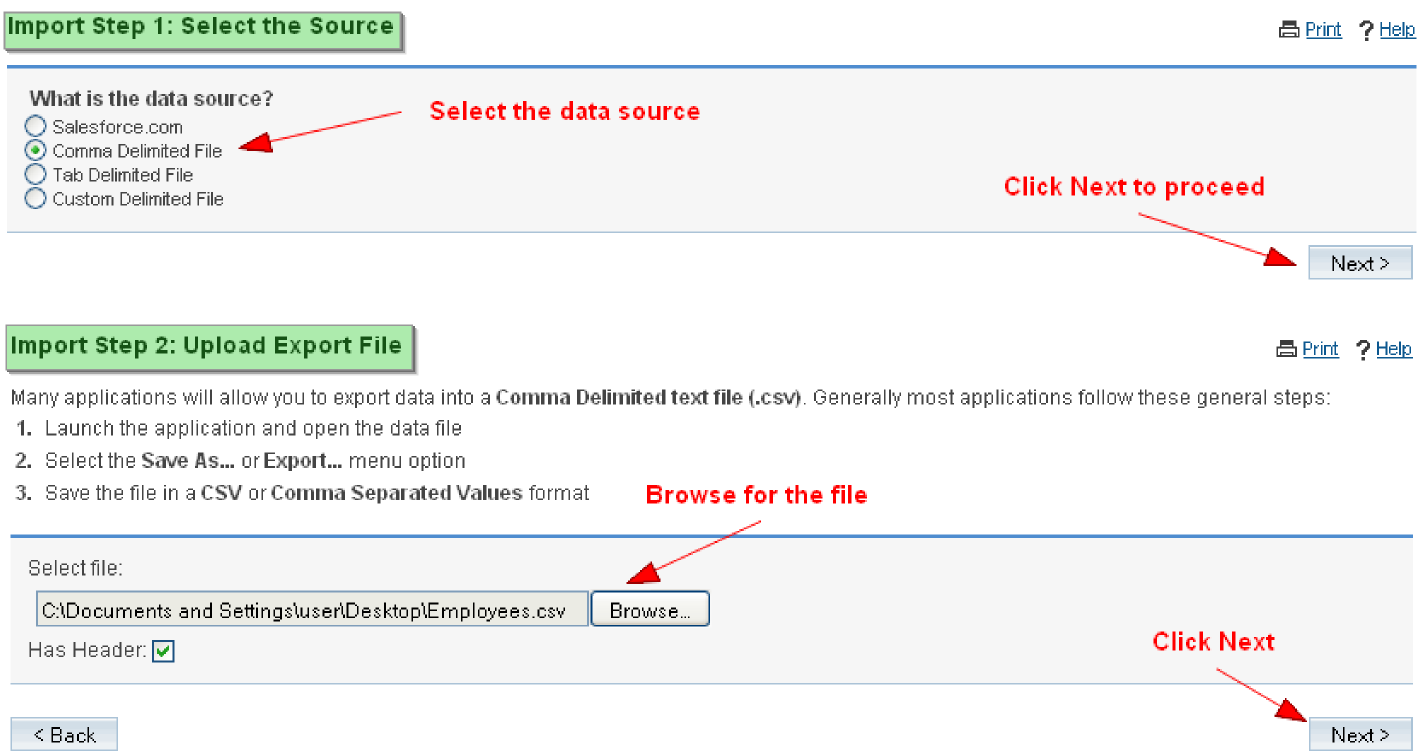


Create Lead from vCard

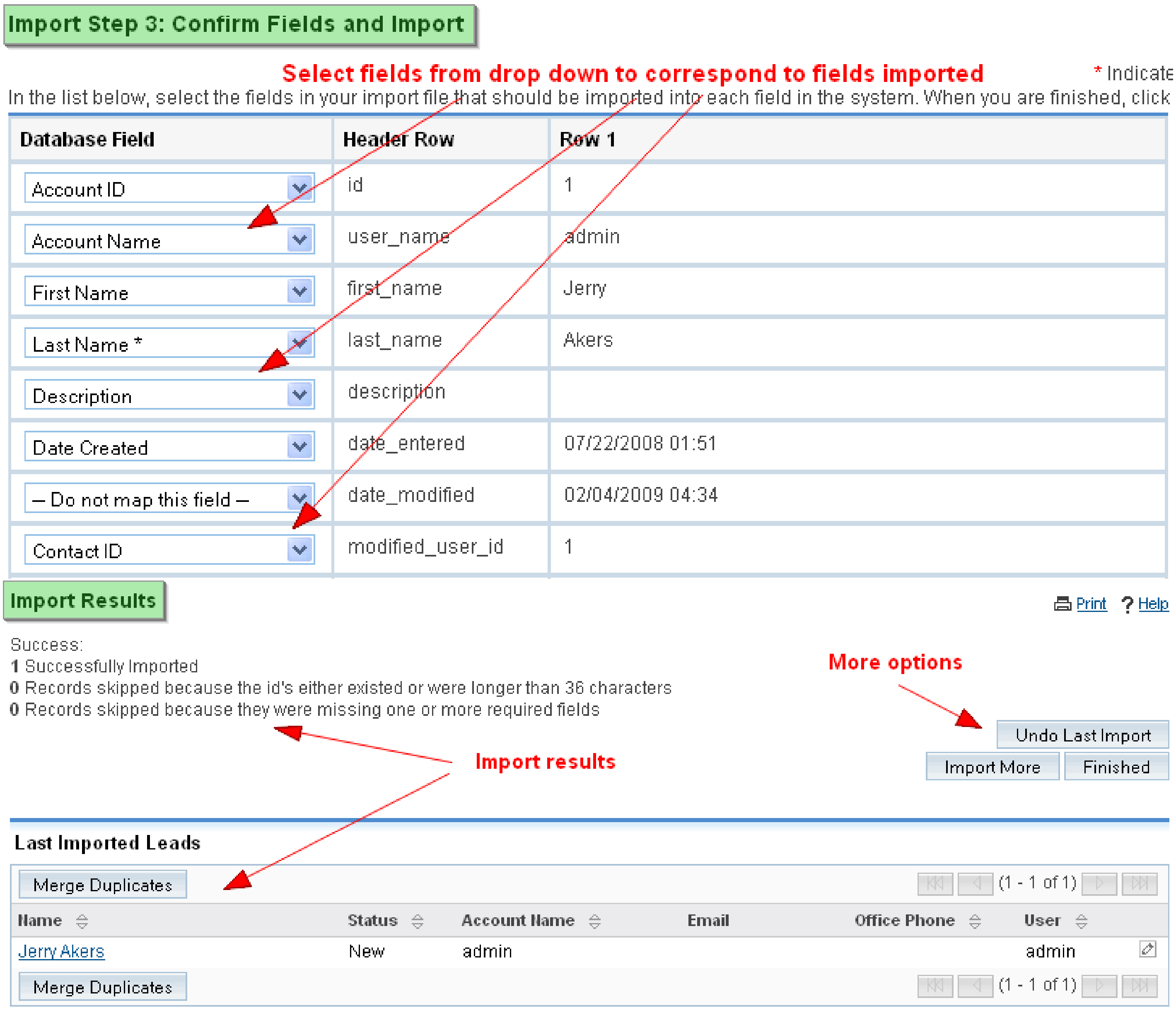


Import Leads

Another way of adding Leads is importing them from a data source. Let us discuss the Import feature function step by step. When you import Leads, you can select the default value for the Lead Source, such as Direct Mail, Trade Show, and so on from the drop-down list in the Default Value column.

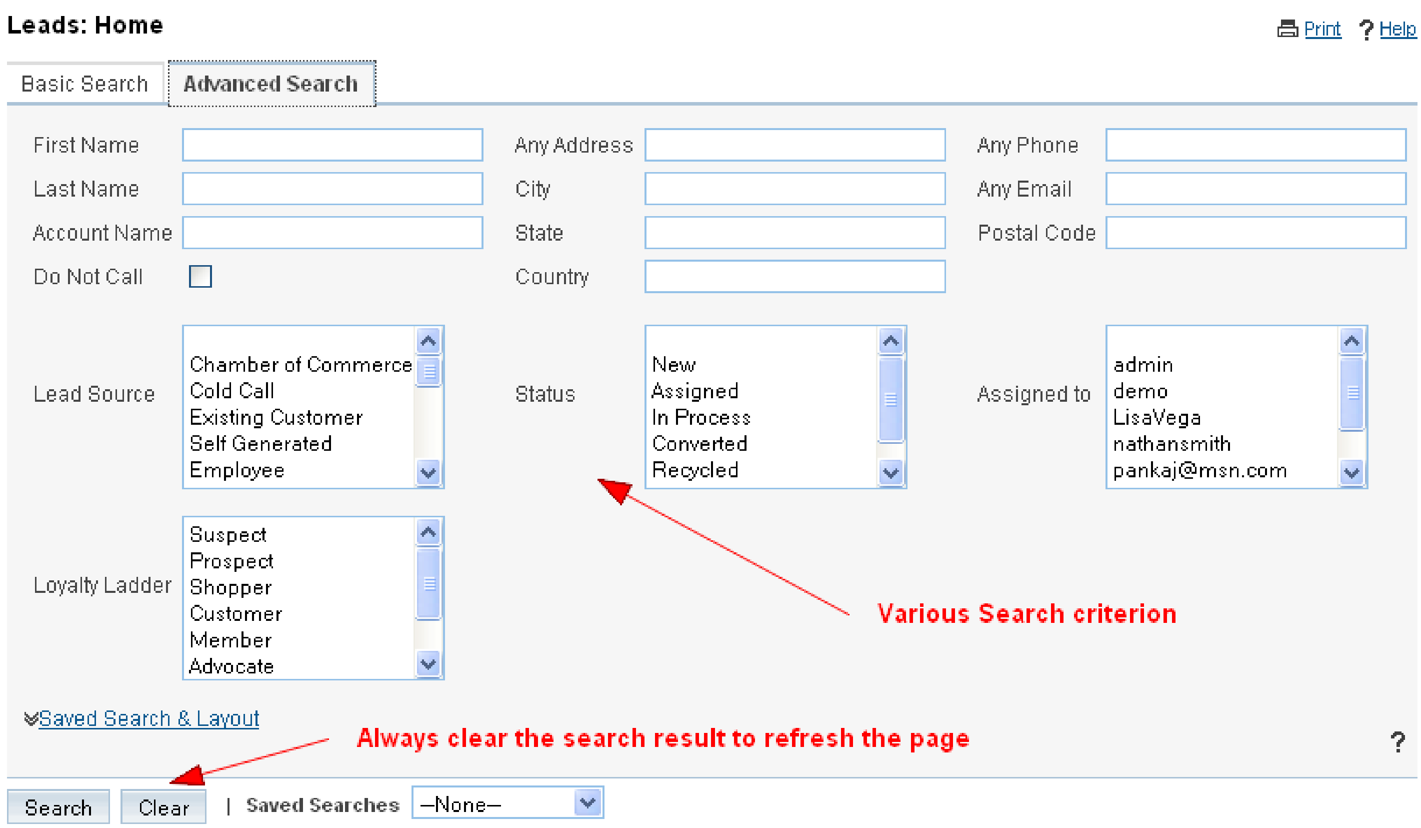


Map the system fields with the corresponding fields from the file imported. Once the fields have been mapped, click on **'Import Now'** at the bottom.

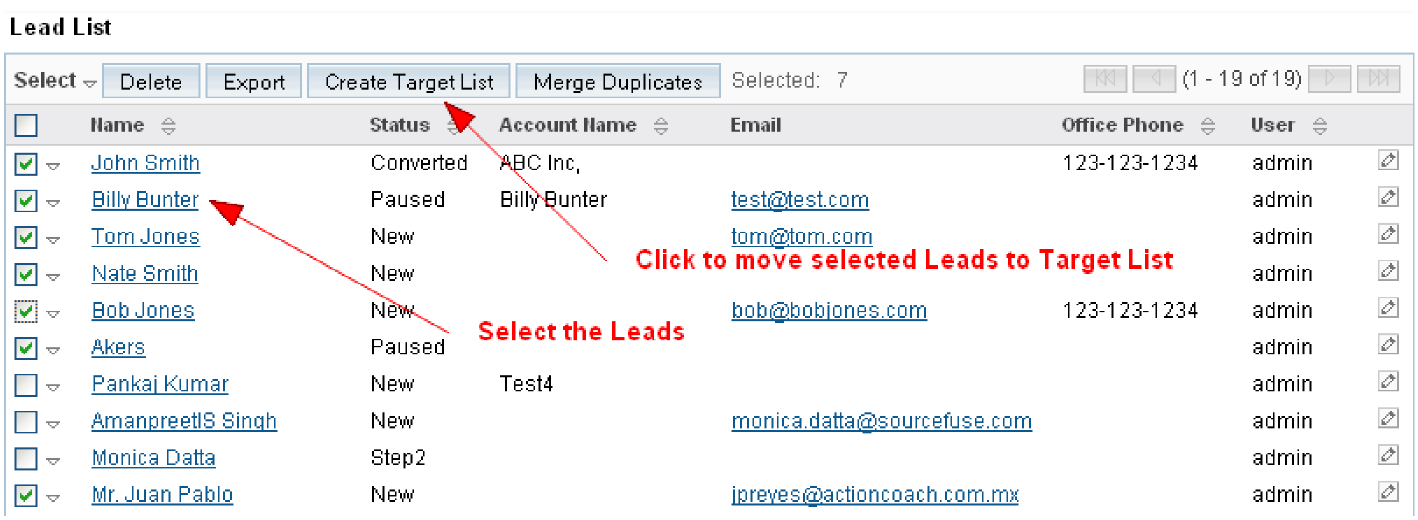


* NOTE: the procedure to Import files is same for Contacts and Accounts.

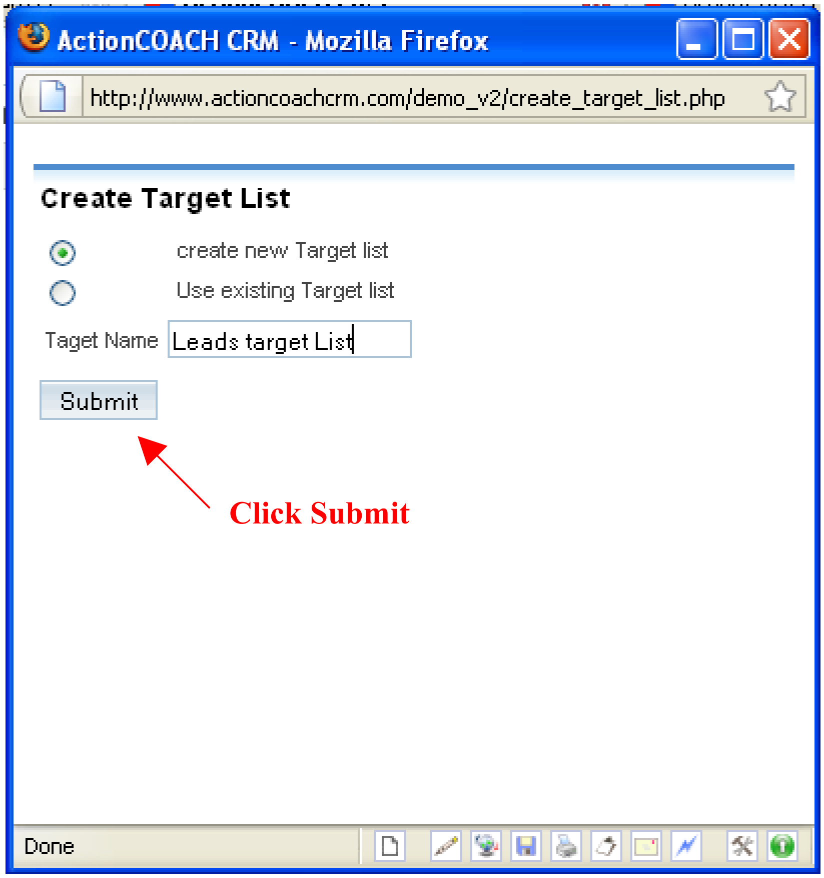
Advanced Search



Create a Target List from Leads



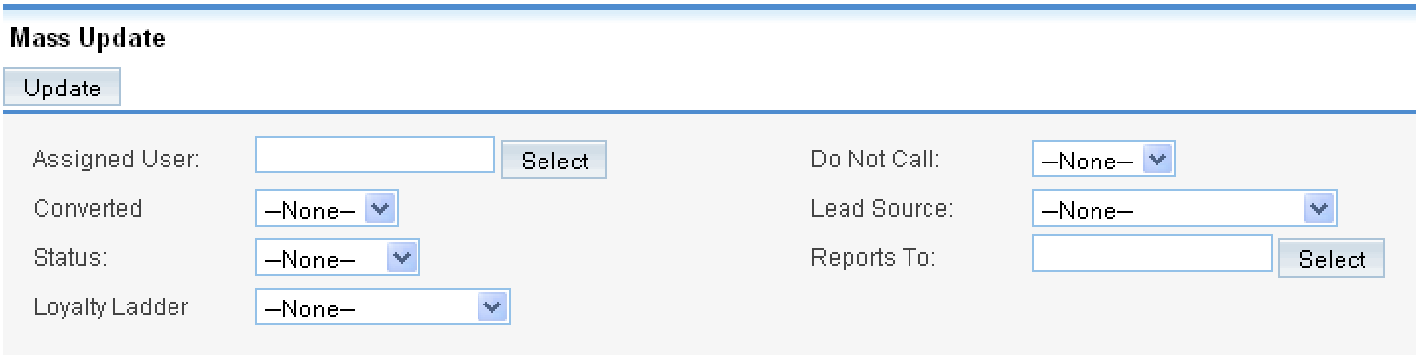
Give the Target List a name and click on Submit.



Similarly you can select the desired Leads and Export them to a .csv file

Mass Update

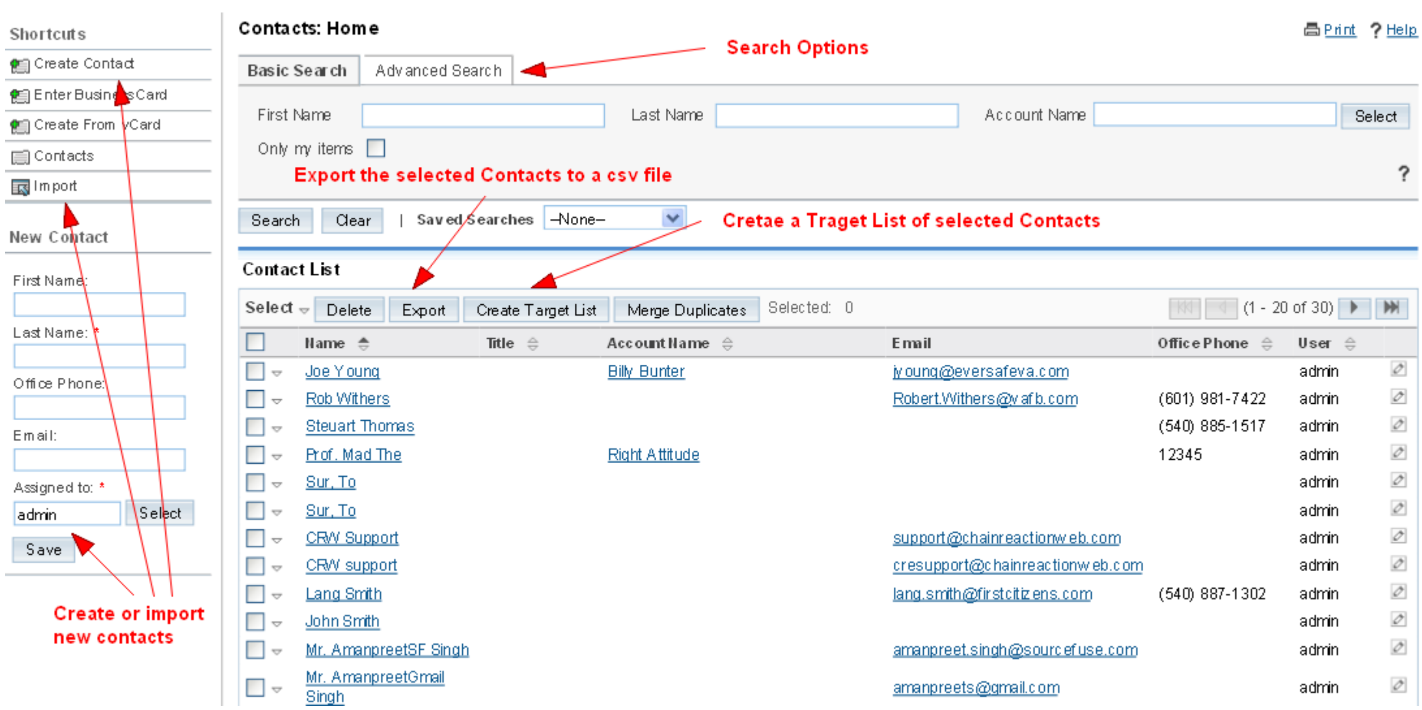
- manage more than one account
- select the desired records/leads
- choose the desired function for the selected records/leads
- the changes will reflect in the Leads list



Contacts Module

Use the Contacts module to create and manage contacts for your organization.

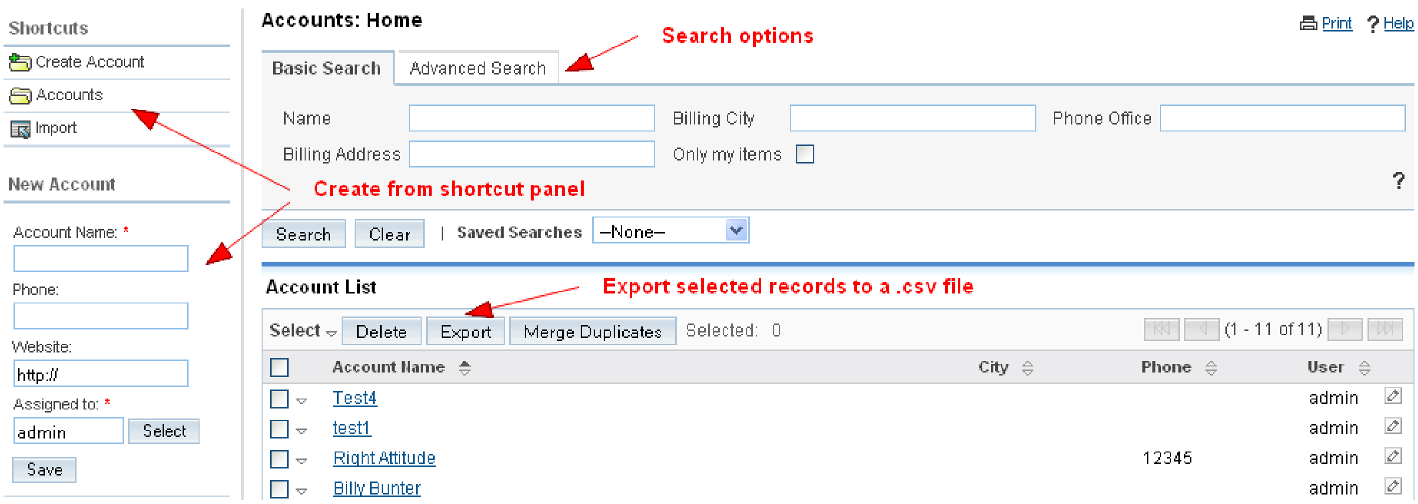
A contact is any individual who is a valid sales lead; that is, a lead who has been evaluated and assessed for a possible sales opportunity. You can associate a contact with any record such as an account, opportunity, or campaign. Associating a contact with a campaign enables you to track the effectiveness of the campaign in generating opportunities for your organization.



NOTE: *The functions in a Contacts module are similar to those in a Leads module; the difference is in the search criterion/fields.*

Accounts Module

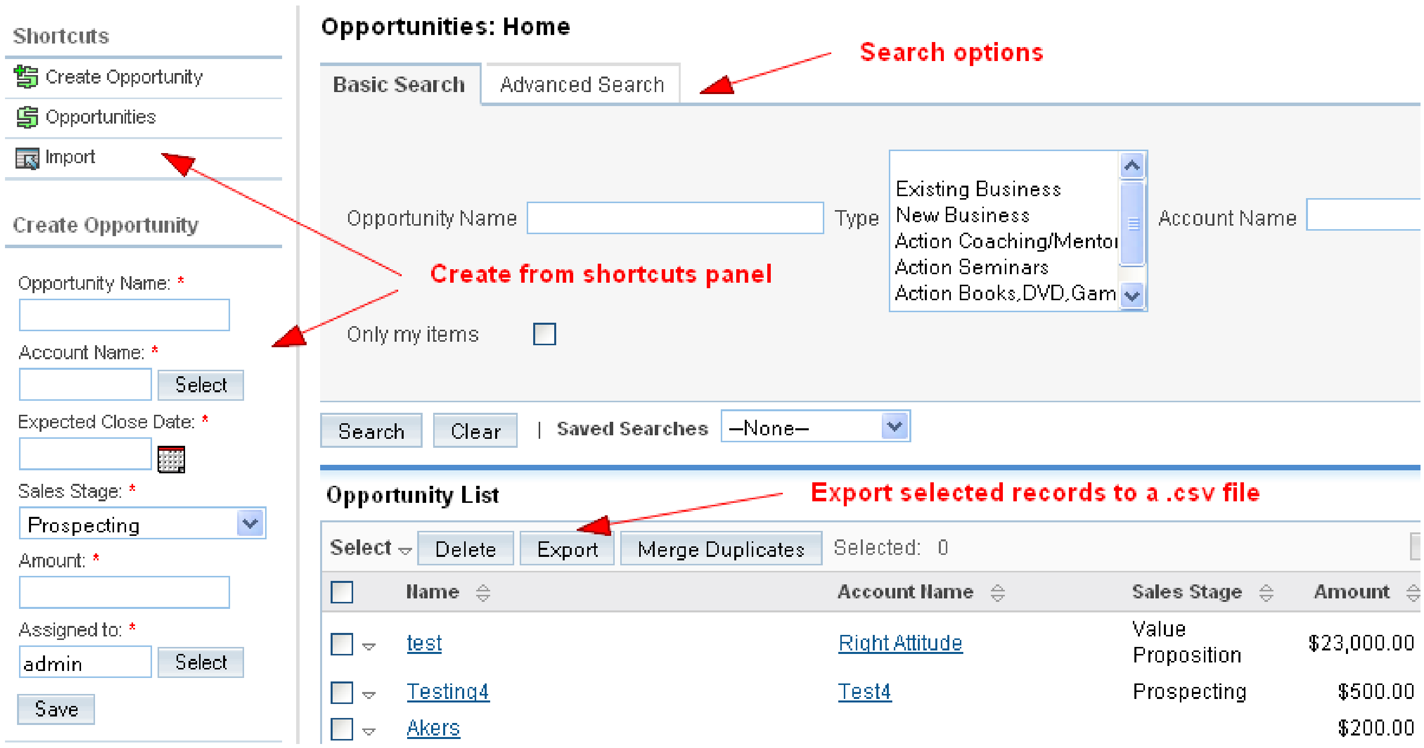
The Accounts can be associated with other records such as Contact or an opportunity. Accounts are records/leads that have been converted to leads in the system through a workflow. The features are the same as in the other modules.



NOTE: *The functions in a Contacts module are similar to those in a Leads module; the difference is in the search criterion/fields.*

Opportunity Module

The opportunity contains the records of an Account who can generate revenue for your organization. Each opportunity is related to an account and multiple opportunities can be related to the same account.



NOTE*: The functions in a Contacts module are similar to those in a Leads module; the difference is in the search criterion/fields.*

Workflow Module

The workflow manager is a custom built module *exclusively* for the ActionCOACH CRM users. A workflow is a tool that allows you to:

- Re-create your Business processes inside the CRM program, by breaking them into logical steps
- The steps can further be broken into logical Tasks
- Allows you to track certain activities within the organization.
- Allows you re-assign the sequence of the steps/tasks.

Let us discuss this with the help of an example.

If your business is to manufacture automobiles then the workflow process for assembling the car could be like:

<u>Workflow: How to assemble a Car.</u>

Step1. Apply body to car frame.
Step2. Install car interior.
Step3. Paint the car.
Step4. Install the wheel and tires.
Step5. Test drive finished car.

Each of the steps involves a series of steps to be completed, some of which can be skipped based on the situation. In the example we have used let us understand the Tasks for Step1

<u>Step 1: Apply body to car frame</u>.

Task 1. Obtain correct car body and move to assembly line.
Task 2. Gently lower car body on top of the car frame.
Task 3. Secure car body to car frame.

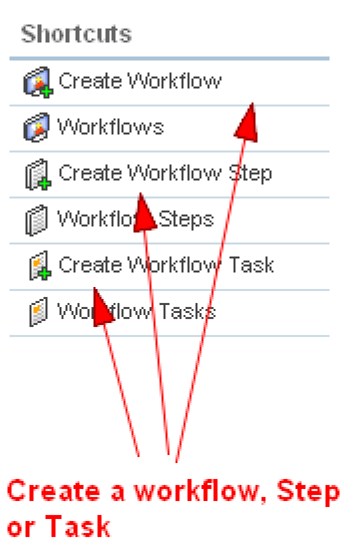
In order for Step 1 to complete the tasks need to be performed in sequence.

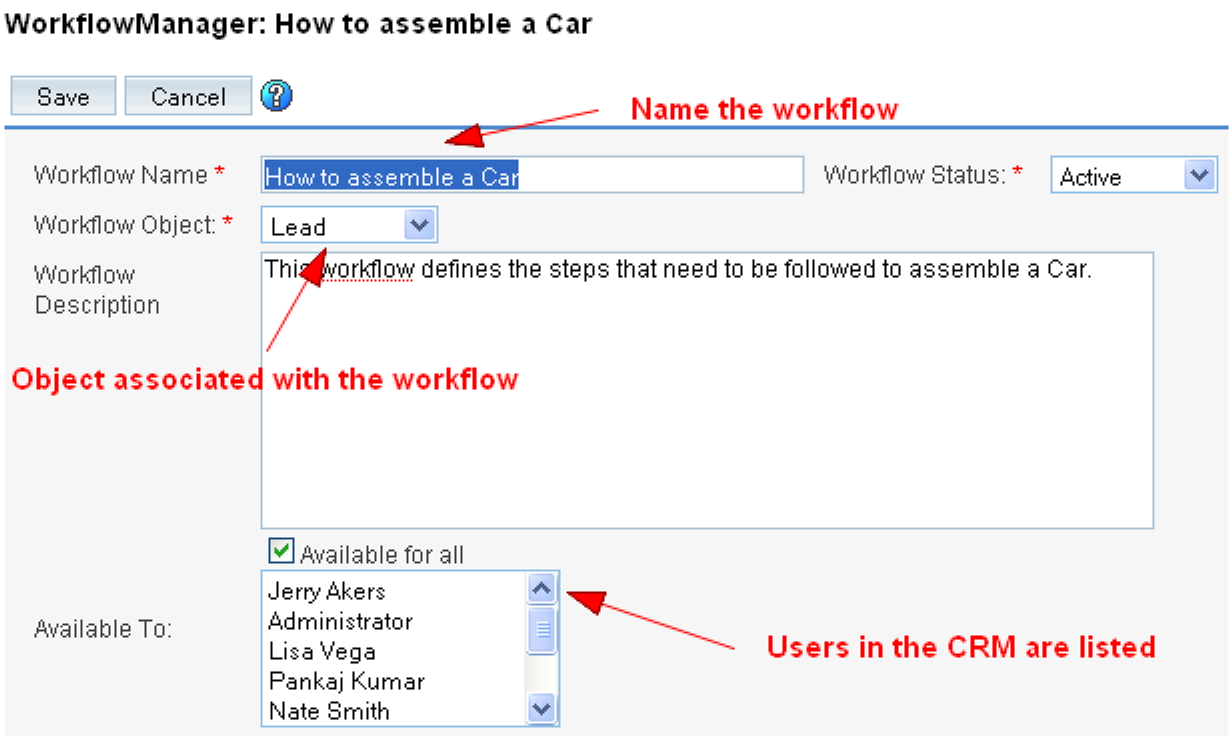
How to Create a Workflow?

Creating a workflow helps you determine:

- Determine who the workflow is intended for Leads, contacts or account.
- Determine the users who can access the Workflow

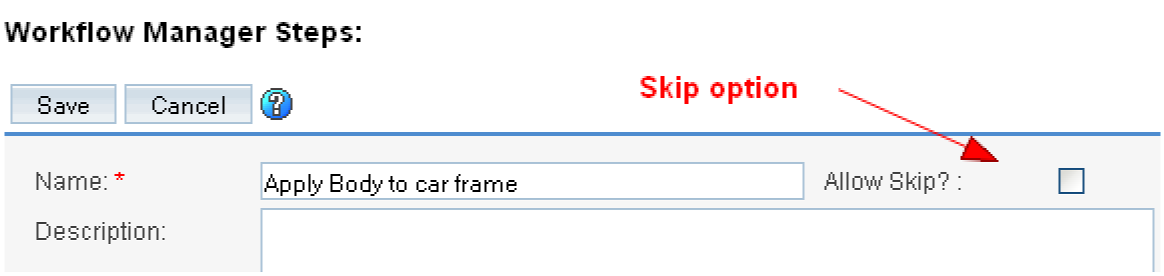
<u>Creating a Workflow</u> is simple, click on the create workflow option on the left panel.





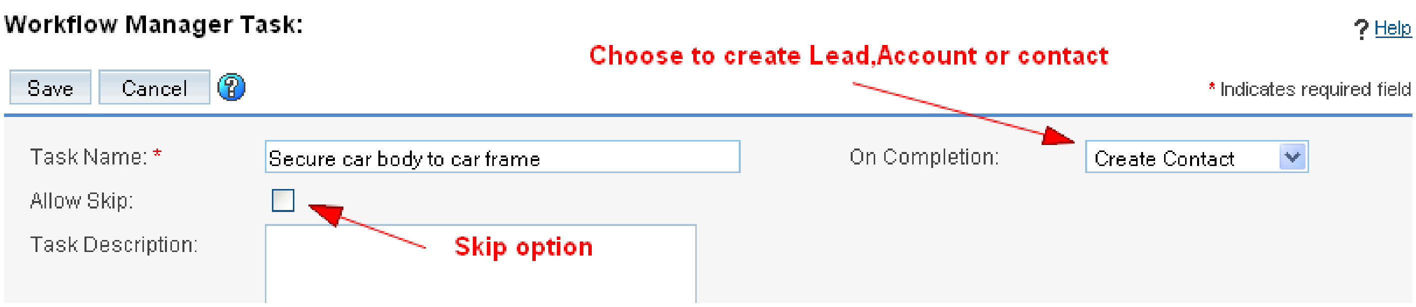
Choose who the workflow is available to, by holding control or check the box as shown above for all users.
Workflow Object: workflow can be intended for either a Contact, Account, lead or opportunity.

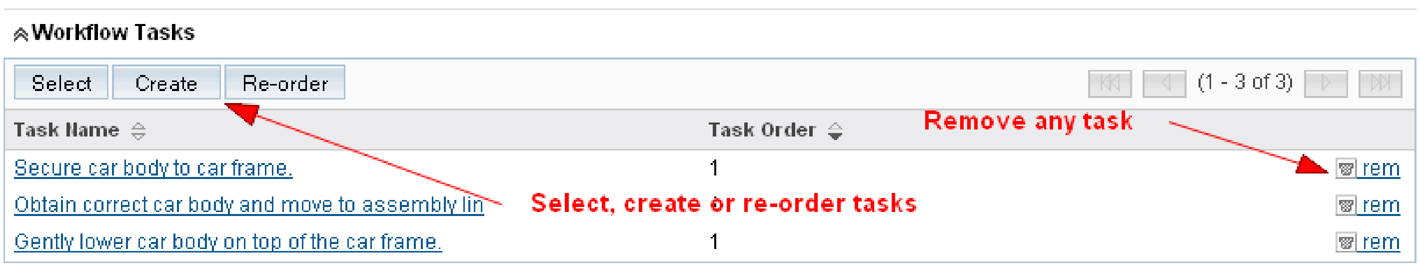
<u>Create a workflow Step</u>



We have an option to skip this step by clicking the check box. In our case this step cannot be skipped so we did not choose it.

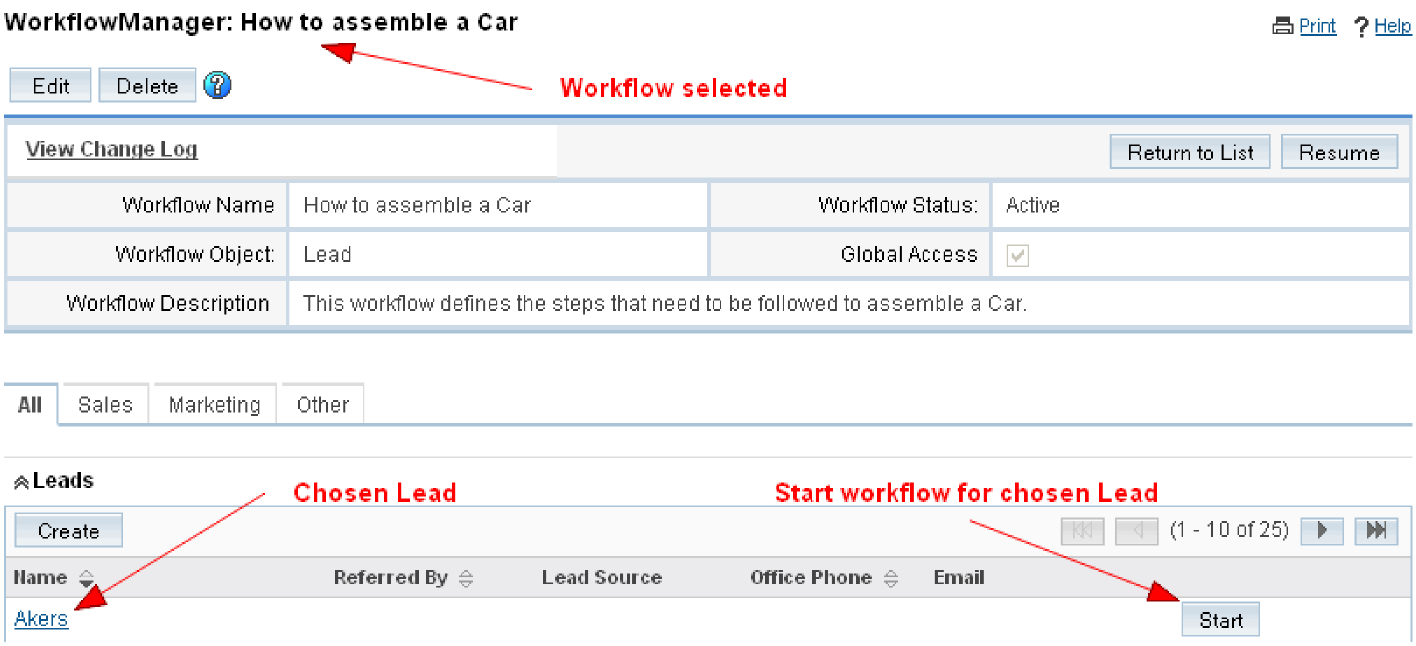
Create a workflow Task



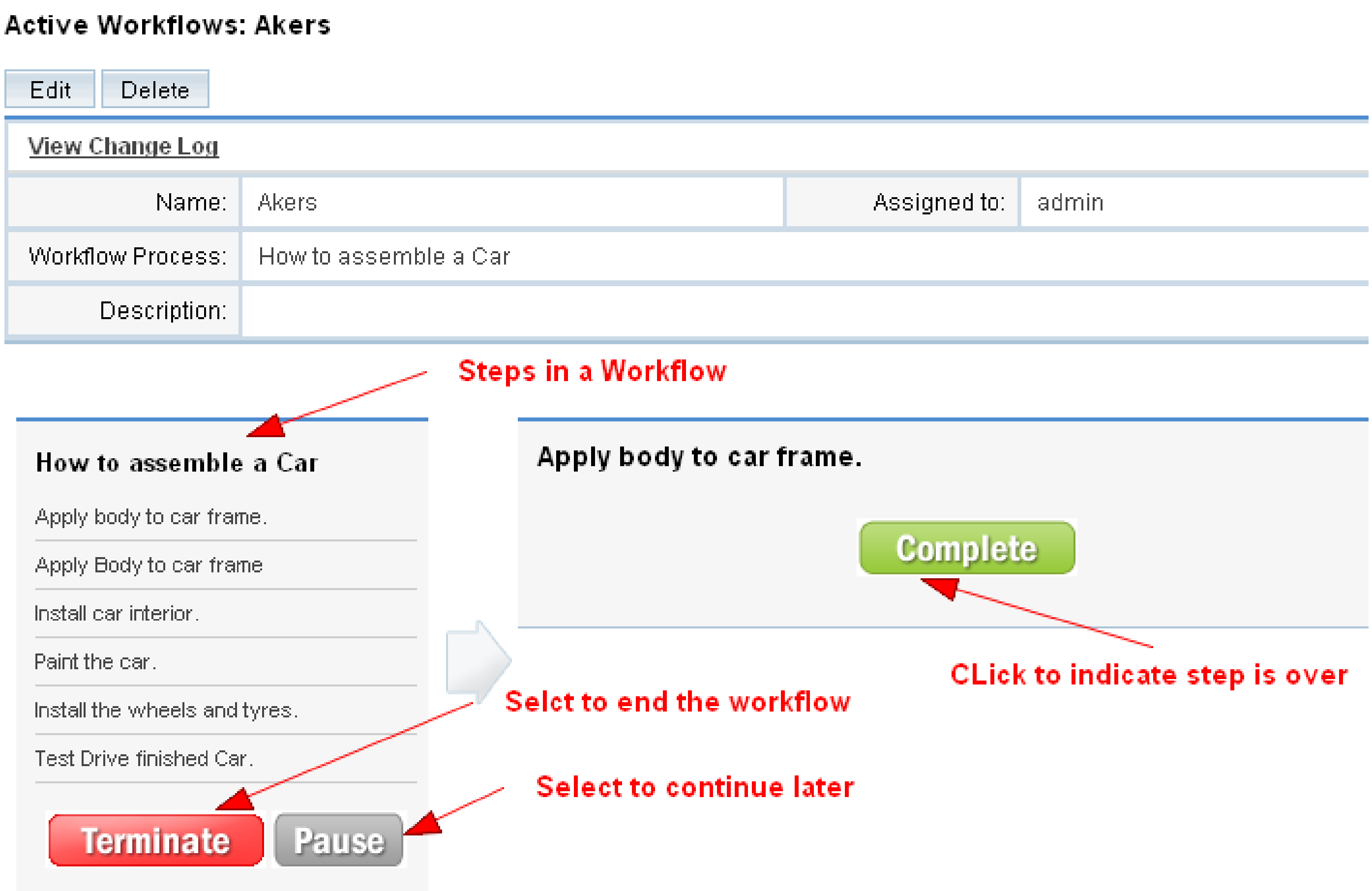


Execute a Workflow for a Lead

Let us execute the **Workflow: “How to Assemble a Car”** for the Lead ‘Akers’



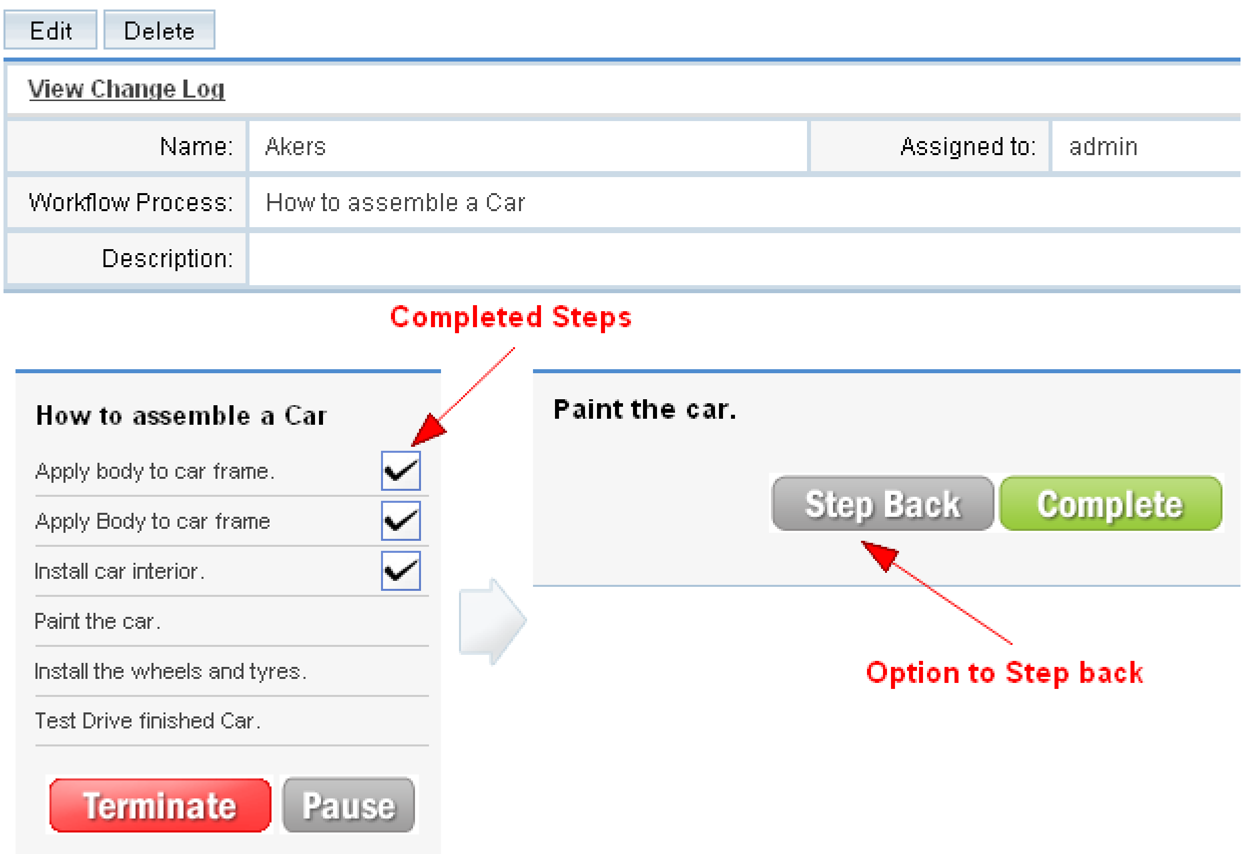
1) ***From the list of Leads Click*** ***Start*** ***besides the desired Lead***

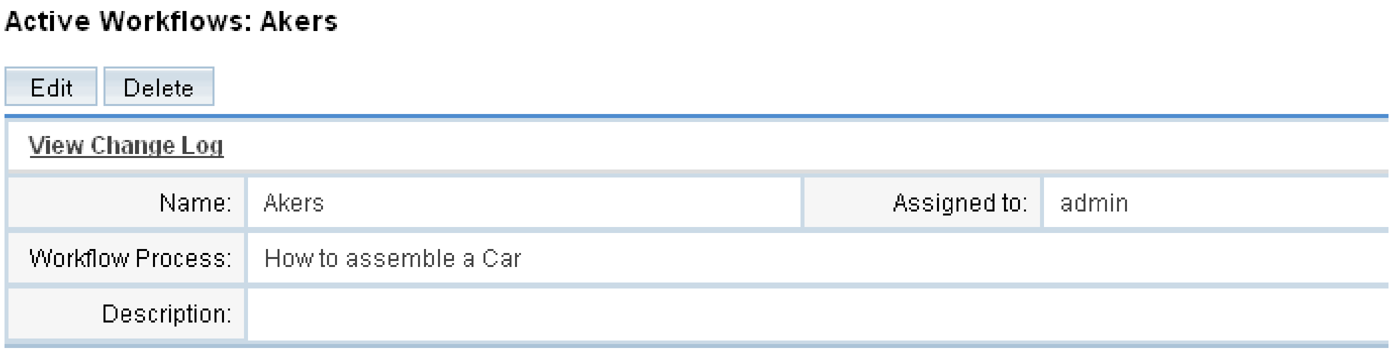


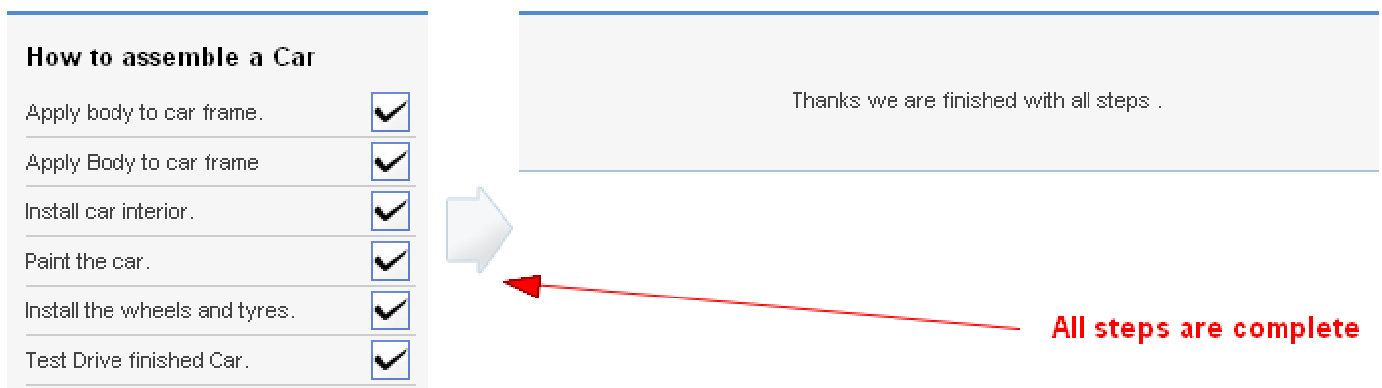
2) ***Click on*** ***Complete*** ***for each step once it is over.***

Pause : *If you wish to continue later. The status 'Paused' will appear besides the Lead*

Terminate: *If the Workflow is terminated then all the associated steps and tasks for the Lead also get deleted.*



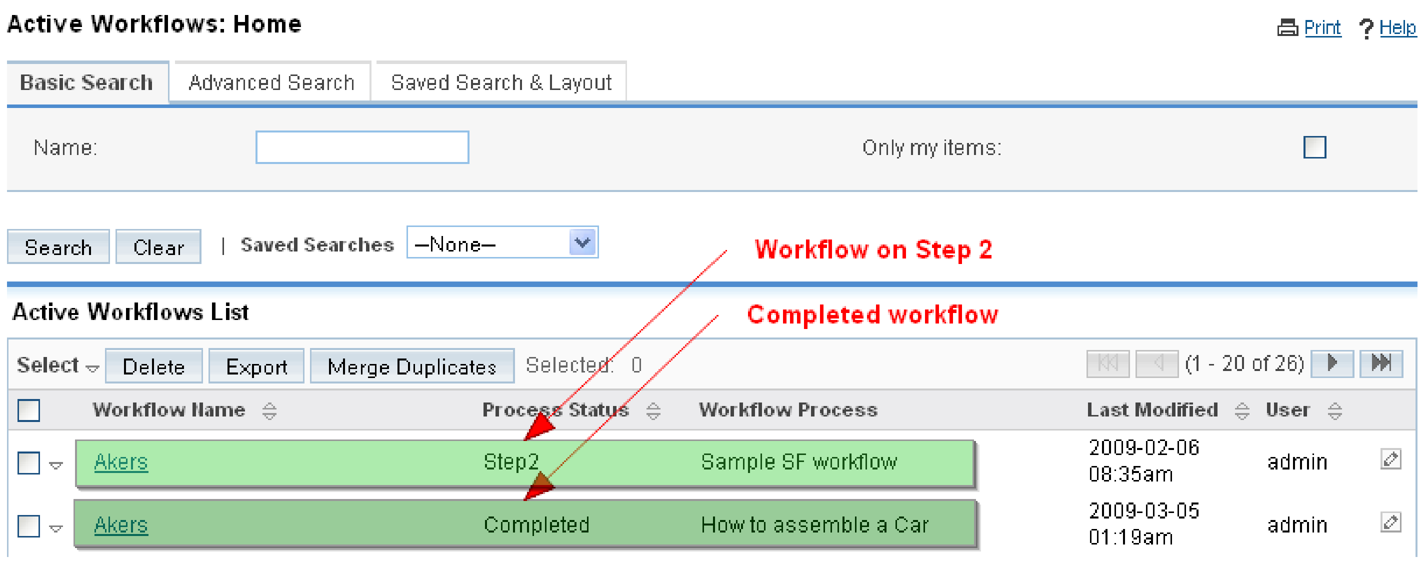




If you now view Active Workflows (below) you will find 2 entries listed for Akers

The 1st workflow “Sample SF workflow” is a previous workflow that was run for Akers and left at Step 2
The 2nd workflow “How to assemble a Car” was run by us to completion.

A lead can have more than one workflow running for them.



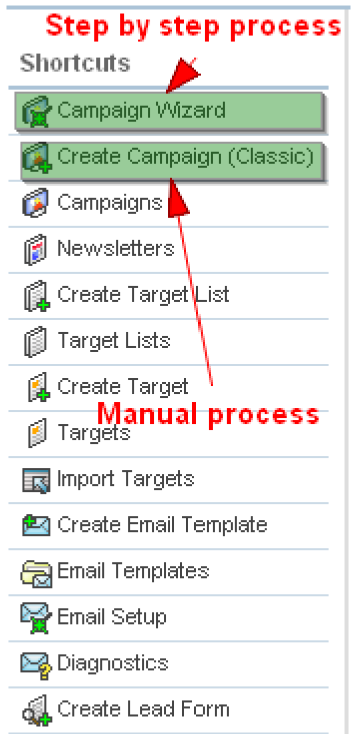
Campaigns

The campaign module allows you to track and manage mass marketing campaigns for e-mail and newsletters.

<u>Campaigns</u>

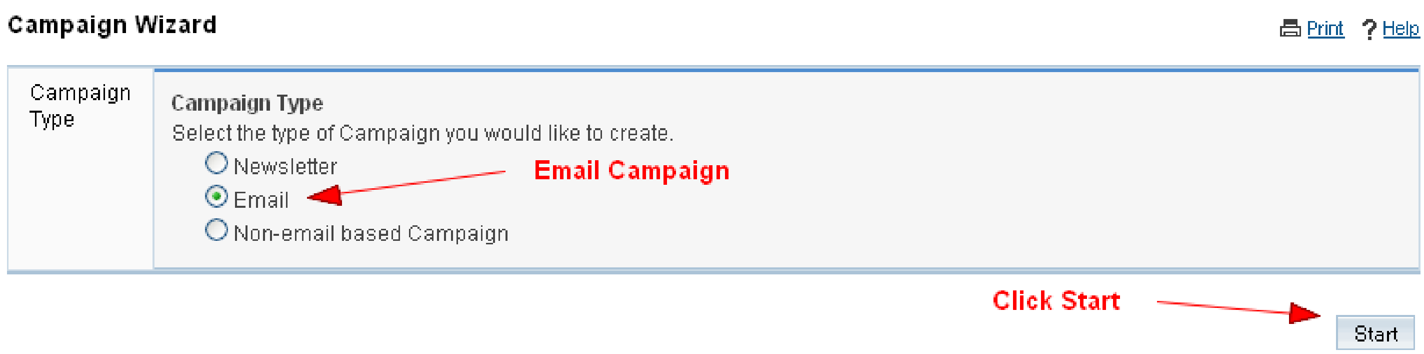
- allows you to send mass marketing emails/newsletters to Leads, contacts, perspective clients and accounts
- allows you to choose recipients from the Leads, Contacts and Clients
- gives you the option to suppress/block mails from being sent out, based on id, email address or domain
- on completion you can review the results that tell you who received the mail, recipients who checked the mails, the number of click thrus on the Trackler URL's
- allows you to add Tracker URL s for recipients to click on to either register or un register
- a user once un registered does not receive future communication and the corresponding information for the user gets updated.

Create a Campaign

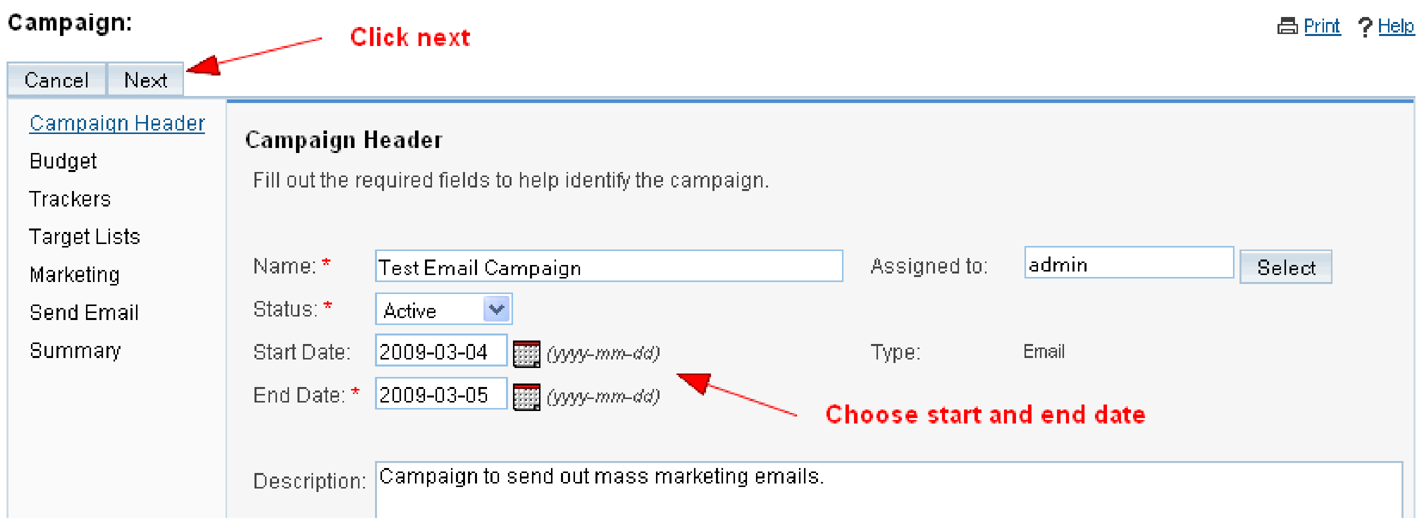


Let us now walk you through running a campaign wizard for an e-mail campaign using the Campaign Wizard.

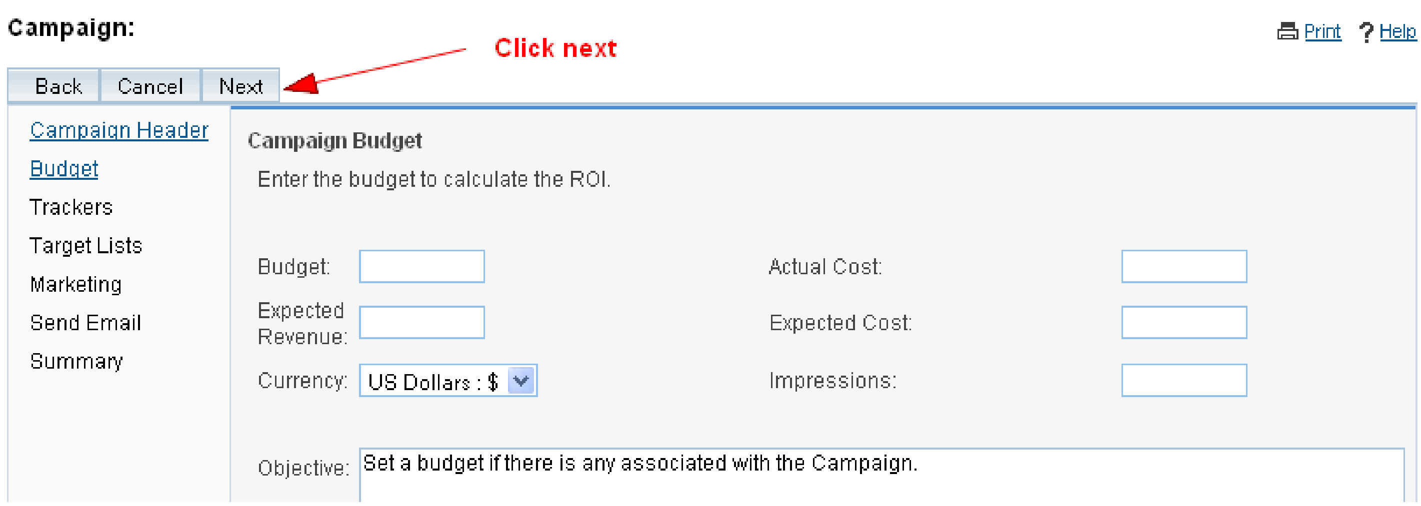
1) Click on **Campaign Wizard**.



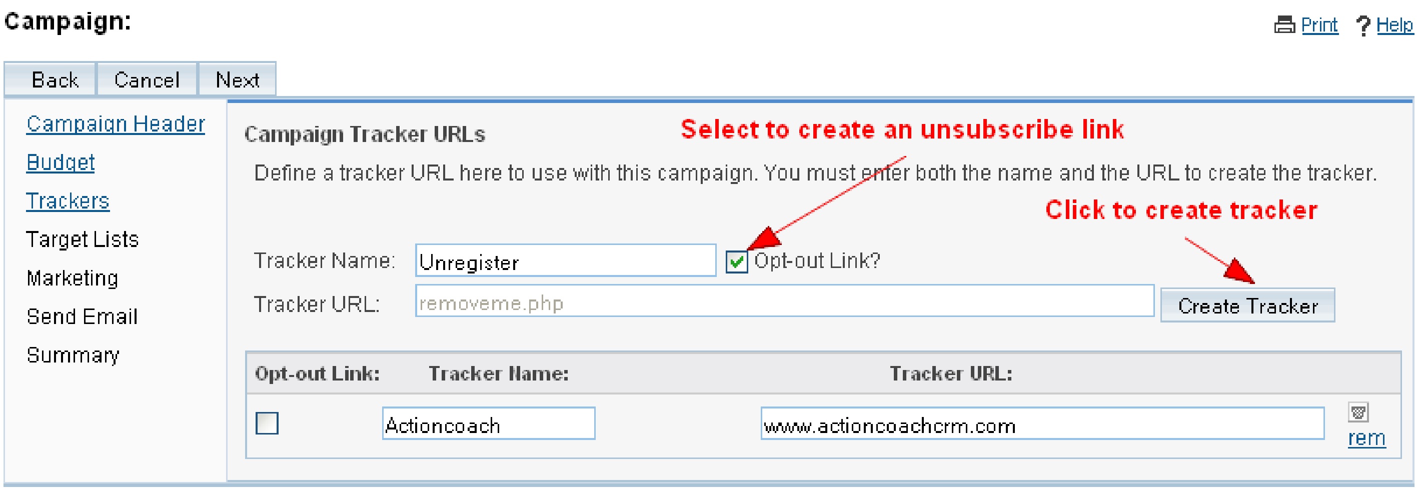
2) After filling in the mandatory fields Click **Next**



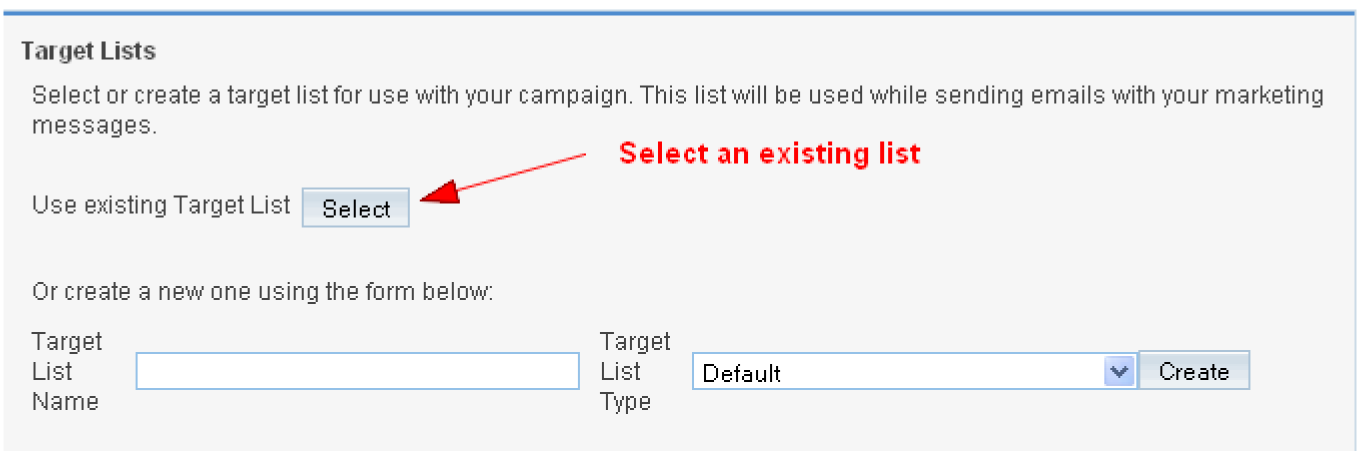
3) Fill in the Budget details if relevant. Click **Next**



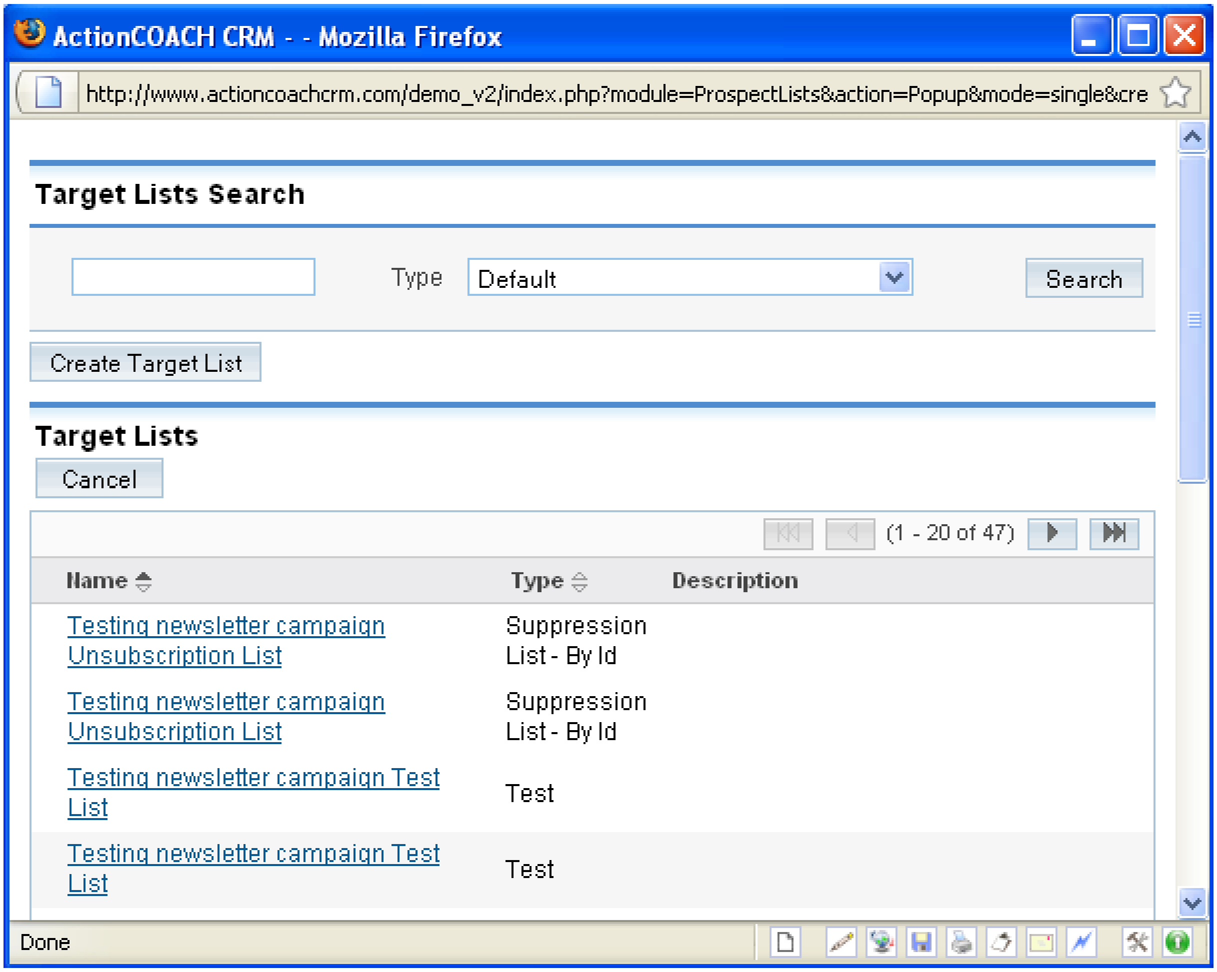
4) Create a Tracker URL, the opt-out link needs to be selected in order to make the URL to un-register from a mailing list. Click **Next** once the URL are made.



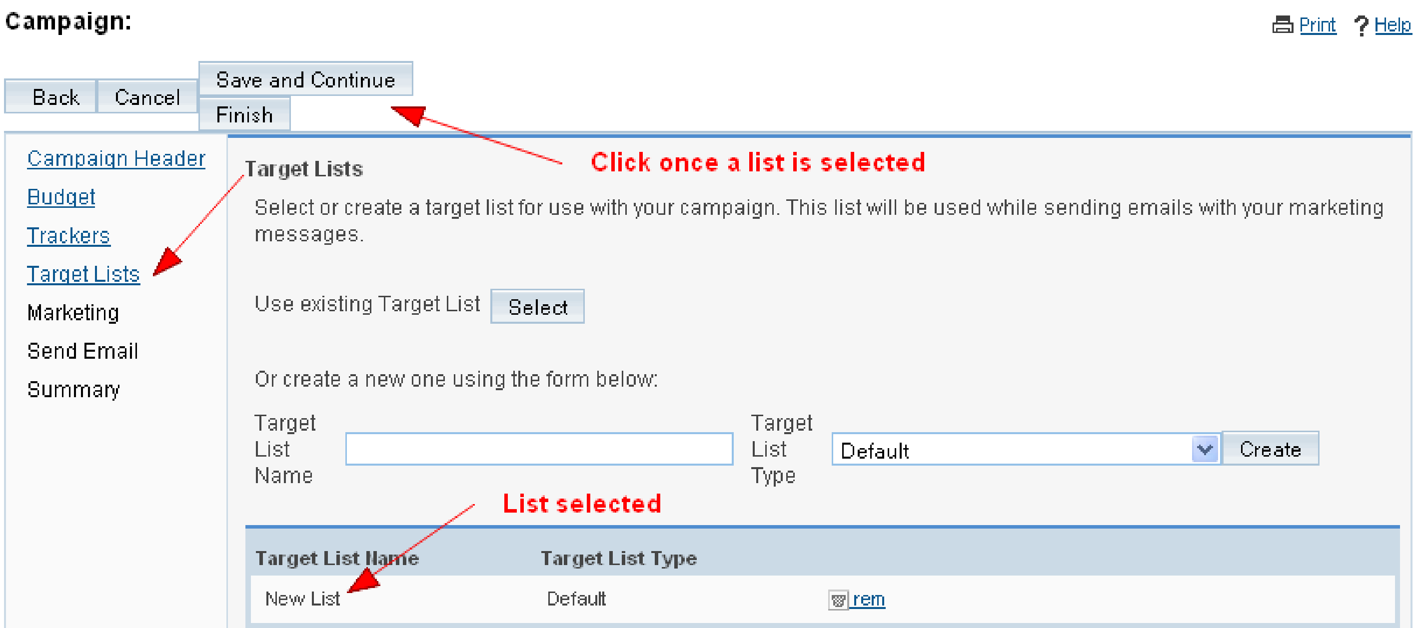
5) You may create a Target list from here or select from an existing list. Click Select to get the existing list of Target Lists



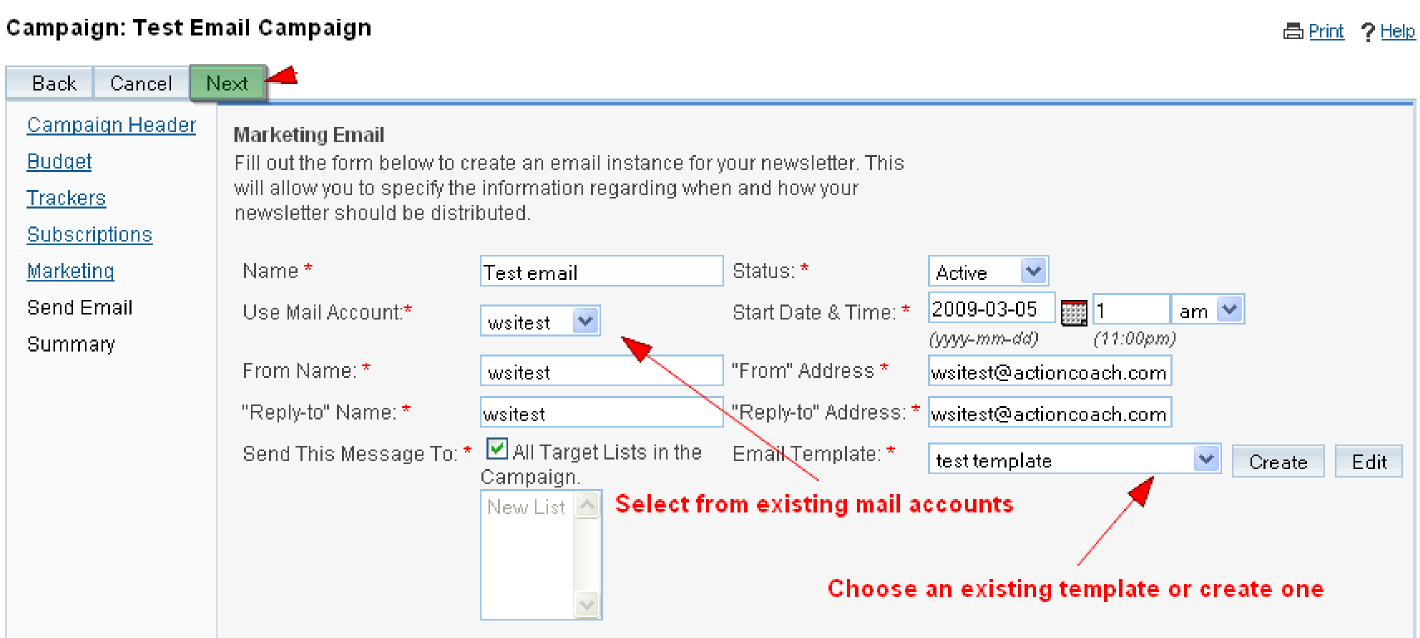
6) Make your choice from the List



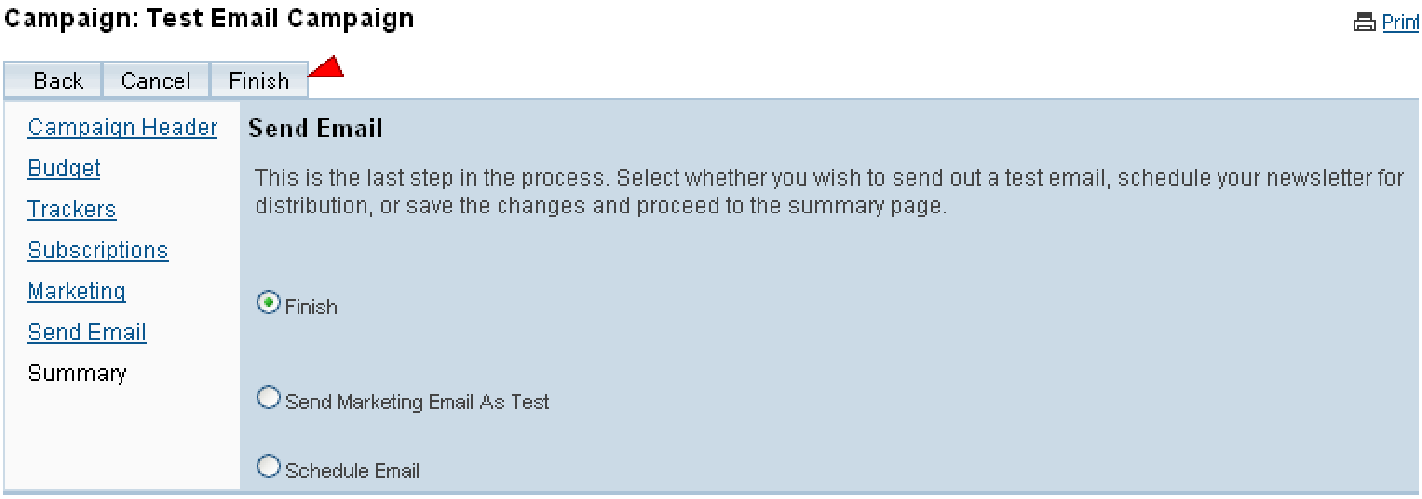
7) Click Save and Continue to proceed



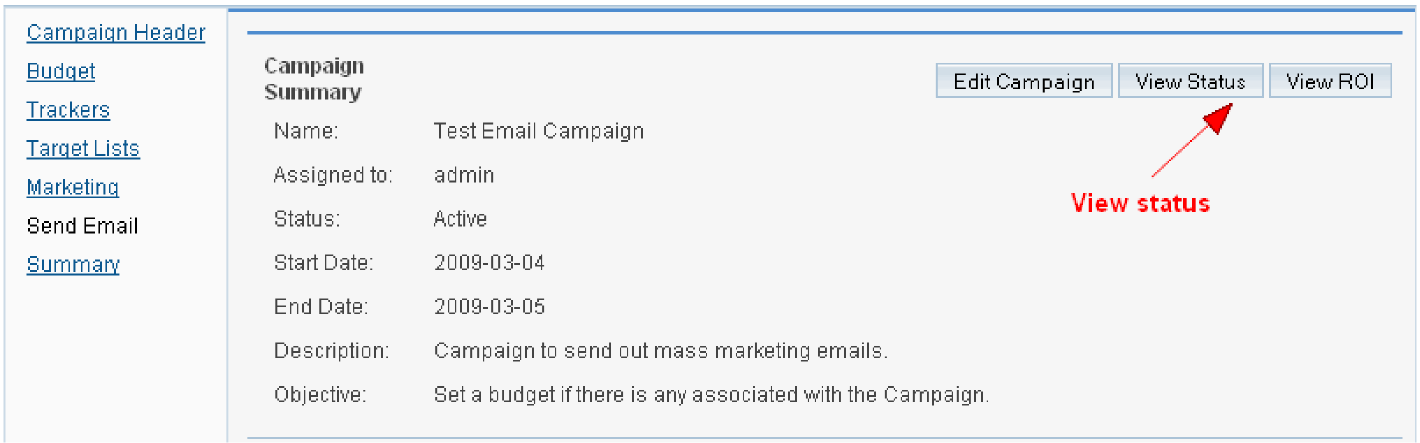
8) Marketing email has all the information about the email you are sending. Fill in the mandatory fields. From the Mail Account choose the Active mail account to handle the campaign. Click **Next**



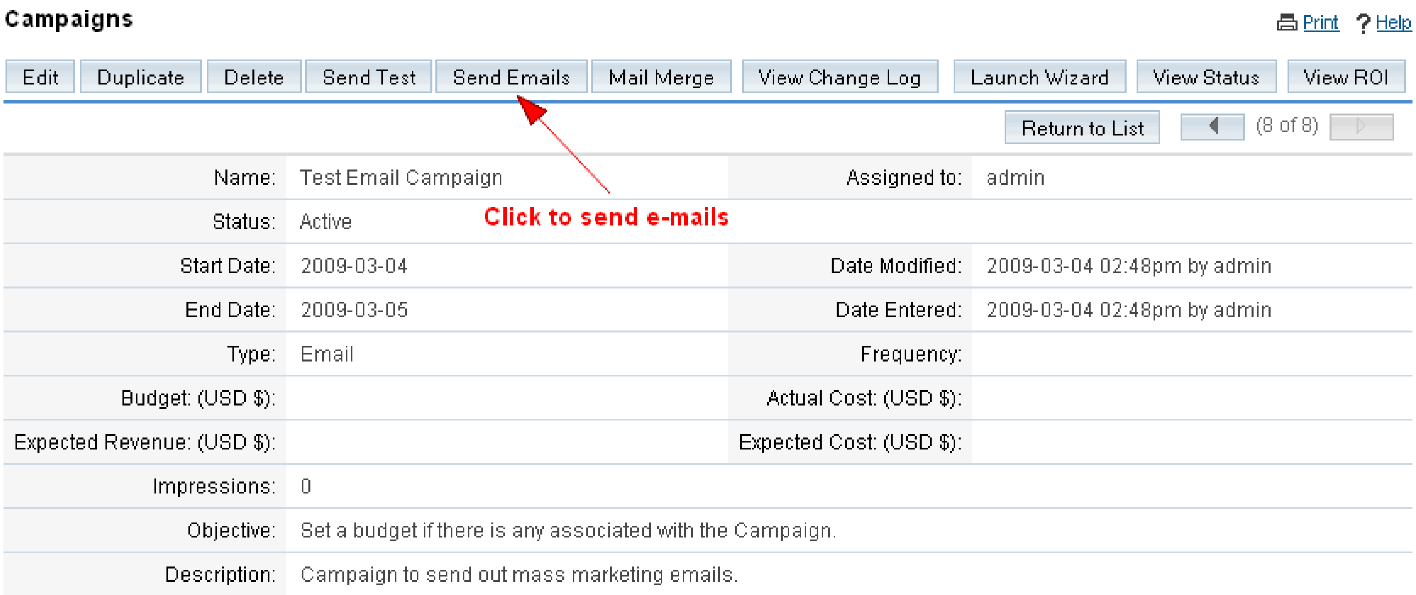
9) Click Finish



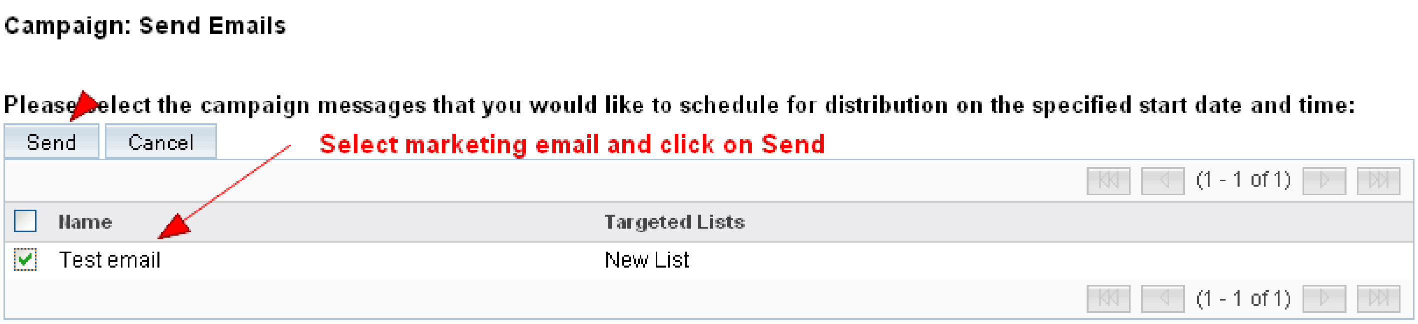
10) Click View Status to view the details of the Campaign



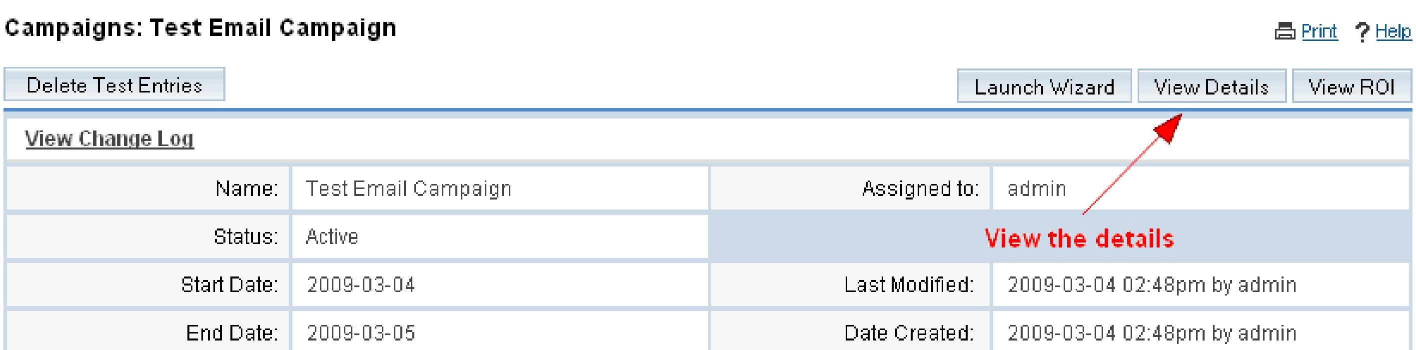
11) Click on Send emails to run the emails through



12) Select the marketing email and click on send. You can send more than one marketing email .



13) Click View details to get detailed information about the Campaign.



Campaigns: Test Email Campaign

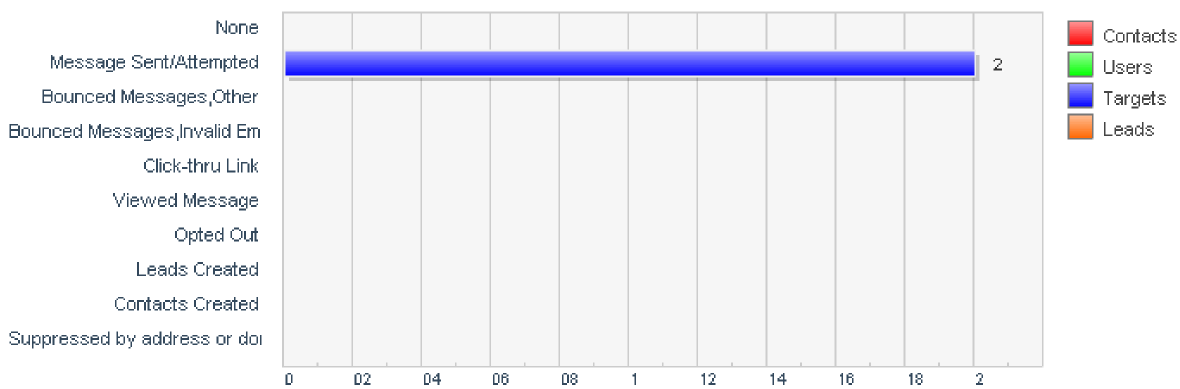
Print ? Help

Delete Test Entries | Launch Wizard | View Details | View ROI

View Change Log

Name:	Test Email Campaign	Assigned to:	admin
Status:	Active		
Start Date:	2009-03-04	Last Modified:	2009-03-04 02:48pm by admin
End Date:	2009-03-05	Date Created:	2009-03-04 02:48pm by admin
Type:	Email		
Budget: (USD $)		Actual Cost: (USD $)	
Expected Revenue: (USD $)		Expected Cost: (USD $)	
Objective:	Set a budget if there is any associated with the Campaign.		
Description:	Campaign to send out mass marketing emails.		

Campaign Response by Recipient Activity



Rollover a bar to view details.

Message Sent/Attempted

Add To Target List (1 - 2 of 2)

Recipient Name	Recipient Email	Activity Type	Activity Date	Related	Hits
corbin	ryan@google.com	Message Sent/Attempted	2009-03-04 03:13pm	Test Email Campaign: test subject	
Datta	monica.datta@sourcefuse.com	Message Sent/Attempted	2009-03-04 03:13pm	Test Email Campaign: test subject	

Viewed Message

Add To Target List (0 - 0 of 0)

Recipient Name	Recipient Email	Activity Type	Activity Date	Related	Hits

Click-thru Link

Add To Target List (0 - 0 of 0)

Recipient Name	Recipient Email	Activity Type	Activity Date	Related	Hits

Leads Created

Add To Target List (0 - 0 of 0)

Recipient Name	Recipient Email	Activity Type	Activity Date	Related	Hits

Contacts Created

Add To Target List (0 - 0 of 0)

***To learn more you can look for online documentation and video tutorials on our support site at** http://support.actioncoachcrm.com*