User Guide

CRM Software "CarloCRM"

Prof4Net Ltd.

Version 5.2

Please consider carefully whether this user manual must be printed – protect the environment!

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1 Introduction

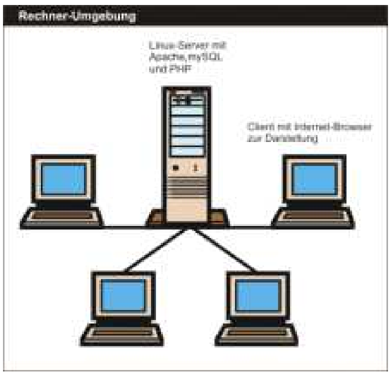
1.1 Functionality

Thank you for purchasing our CRM software CarloCRM.

This solution offers the possibility to simplify and improve your customer-related processes. Customer communication quality is essential at all times but even more so in times of stagnating markets, increasing prices, and performance gains transparency. Herein lies the potential to gain a sustainable advantage over competitors.

CarloCRM focuses accordingly on customer-oriented relationships on all communication channels (fax, mail, mail, phone, web, etc.). Indeed, customers expect inquiries, orders, services but also complaints to be handled at any time and almost anywhere. Moreover, they demand to be informed on the progress and status of their requests and expect a high service level. Therefore, multiple-employee office organizations receive special attention while industry-specific solutions meet the most common requirements. In addition, CarloCRM facilitates customer and business analysis in terms of customer focus and service.

1.2 Technical Basis



CarloCRM integrates into your existing corporate network. The software is based on the client-server principle, i.e., all relevant data is stored centrally on a server while users access software functionality through their clients. CarloCRM was created with the latest technology in application development. Thanks to the strict separation of the areas of data management, application logic, and presentation of results to clients, it has been possible to build a flexible, easy-to-maintain product, which can be inexpensively integrated into existing software systems. Cumbersome, time consuming, and expensive adjustments are a thing of the past because the software is maintained only at one point, i.e., the server. This means that all changes and adjustments to the customer environment are immediately and easily available to all connected users (clients) once implemented in the server.

1.3 System Requirements

Server:

- Hardware: Dual Core computer
- Min 2 GB of RAM,
- Min 80 GB hard drive,
- Software: Windows XP Professional (not Windows Vista),
- Web server software (e.g., Apache for PHP)
- Any database system (e.g., MySQL)

Depending on the number of concurrent users accessing the software, server hardware requirements may increase.

Client:

- PC with Internet Explorer 6.x or a similar WWW browser,
- Mobile devices with graphical display (PDA, cell phone, etc.),
- Screen resolution for best view: 1024x768 pixels

Corporate network:

- TCP / IP, min. 10 Mbps, 100MBit preferred (Fast Ethernet)

2 Accessing the software

2.1 Starting the program

CarloCRM is a software application based on modern web technologies that is called like a regular web address. If the server is on the local network, the application will be called through a browser by entering the local path (e.g., http://crmserver/crm). On the other hand, if the application is run on a Web server, you should enter the address as a regular web address e.g., http://www.crmserver.de/crm. Note that these addresses can also be stored in the Favourites bar of the Web browser to simplify further calling. Alternatively, the software may be started through a shortcut placed on the desktop if the full web address is passed as a start parameter to the browser. After successful calling, the login screen appears.

Fig. 2.1: Login screen

2.2 Login

Users log in using a user name and password combination. If successful, the home screen of CarloCRM appears.

2.3 Logout

Active users can logout of the application through the menu item *User / Logout* or the red logout button. Users should logout to prevent unauthorized access when away from their workstations for extended periods.

2.4 Home screen

The main menu is shown across the top. Click on each menu option to view the corresponding submenu items. Menu items are user-specific. Individual items can be enabled or disabled by the administrator on a per-user basis.

Fig. 2.2: Main menu and Navigation Bar

The menu bar arrows are used to navigate to the previous or next customer records. The most recently modified customer is retrieved by clicking on the person icon placed between the arrows. As you do so, the last used tab (e.g., master data, correspondence, sales, etc.) is called. To the right of the arrows is the list icon, which you can click to add further records to the list view. If no icon appears, there are no further records or the selected filter produced no results.

On the right side of the search area, you can find a search box and a filter selection next to the group filters. Depending on your configuration, the *SF* function (search fields) provides more granular search options than the search box. The search is manually started by clicking on the magnifying glass or automatically launched as you enter characters into the search box. Search results are displayed by default in a popup window.

The main part of the application runs in the central and largest screen section. Your configuration will determine whether the personal information manager (PIM) or the Start Portal should open after login. In any case, both home screens can also be accessed via the icons in the navigation and menu bar:

Click on the blue screen icon to open the Start Portal or on the letters *PIM* to launch the Personal Information Manager.

Fig. 2.3: Navigation

2.4.1 Start Portal

The Start Portal provides several search criteria to find information in your CRM solution. Results are displayed in a list below the search area. Click on a customer name to go directly to the customer overview.

Furthermore, the Start Portal can be used to quickly access the main program functions. However, users may only view those links for which they have been authorized.

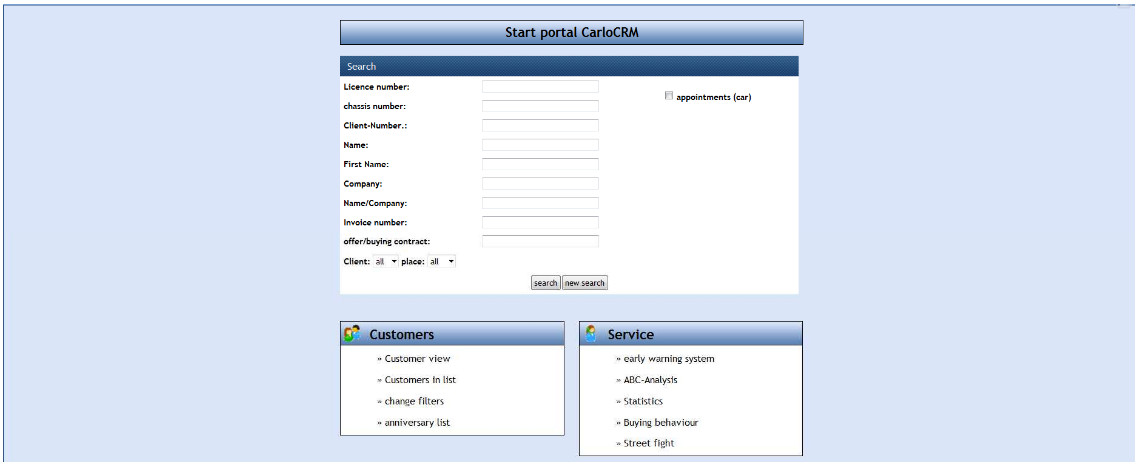


Fig. 2.4: Start Portal

Any CPM or WPS data acquired will appear below the main area.

2.4.2 Personal Information Manager

The personal workplace is also known as the seller's workplace. Employees can select their desired PIM components under the menu item *User / Personal settings*. By default, you will find there all follow-ups for active users, your calendar, and customers' birthdates. For further information on this topic, please refer to chapter PIM functions.

3 Configuration

3.1 Personal settings

Users can access their personal settings under the menu item *User / Personal Settings*. Key and active rights are displayed (user groups, clients) first. All changes must be confirmed with the button *enter/change*.

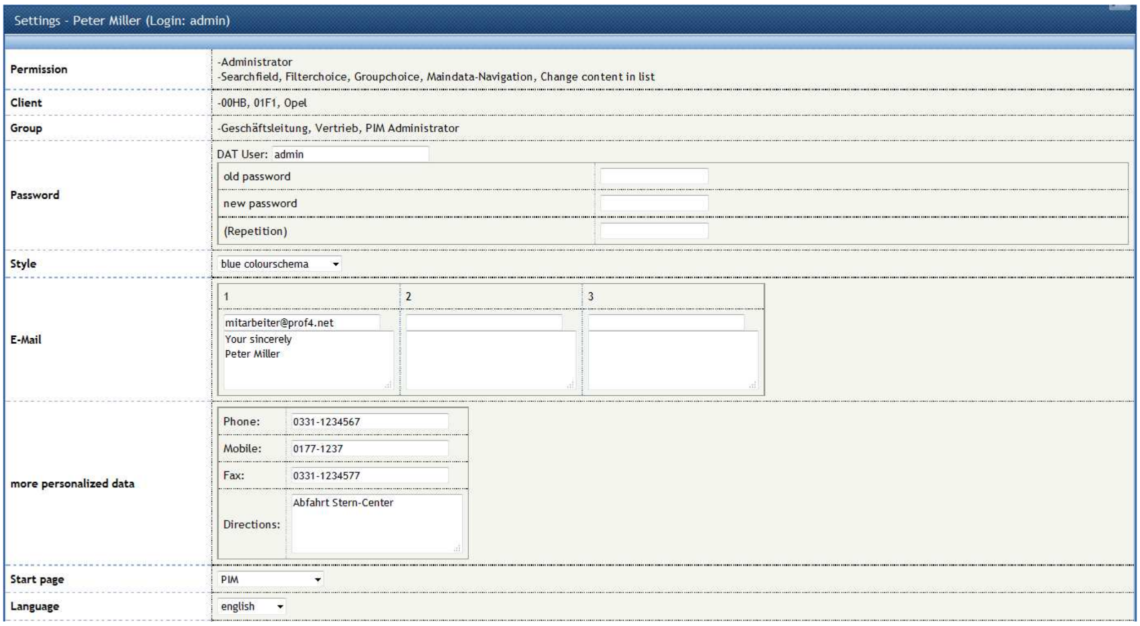


Fig. 3.1: Personal Settings

The *password* can be changed by entering the old one and then the new password twice.

Style determines the overall colour scheme of the software.

Up to three *E-mail sender addresses* and the corresponding signatures can be managed. A sender is selected when sending e-mails (correspondence, e-mailing).

If further personalised data has been set up, these can be used in mail-merge and contract documents.

Home Page determines the program function displayed immediately after login.

Language can be switched between German, Dutch, Russian and English.

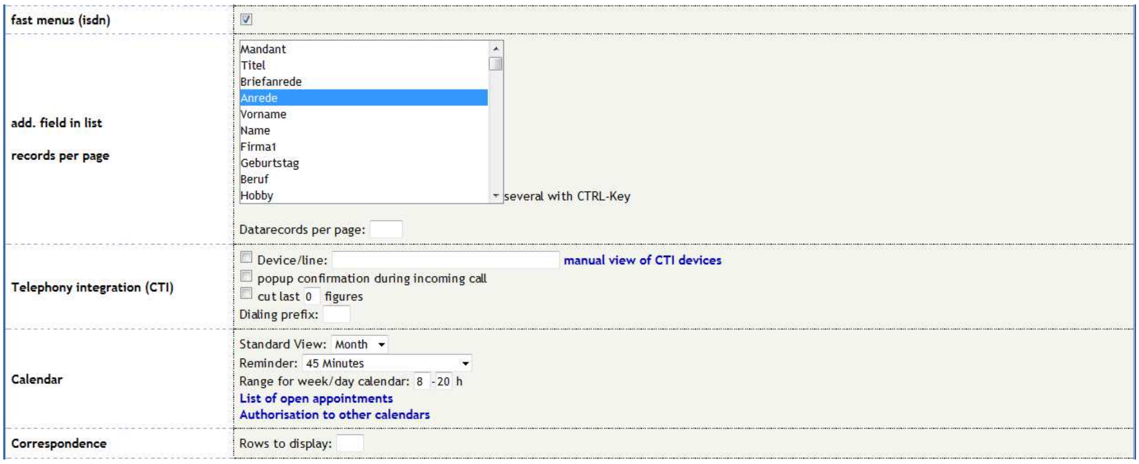


Fig. 3.2: Personal Settings 2

It is recommended to enable *Quick menus* for narrowband connections. Quick menus appear as regular dropdown menus without icon graphics.

Use the selection of *Additional standard fields in* the *List view* to define the results in the filter wizard. The field *Records per page* is set by default to 20 but you may enter a different setting if so desired.

In the *Calendar settings* area, you can specify whether a reminder should be sent for any rescheduled event or new appointment. Use the calendar colour to set the group calendar colour by selecting any HTML colour (e.g., red, black, blue, yellow and RGB values # FF00D0). The range of values below determines the chronological representation of the weekly and daily calendar (start and end time or time interval for a block). The link *List of available appointments* shows all open appointments (e.g., invitations). Under *Access to other calendars,* you can view other users' calendars for which you have read or write authorization. Furthermore, you can determine which users will have access to your own calendar.

Correspondence count determines the number of correspondence records shown in the *Correspondence* tab of the customer view if further entries are available.

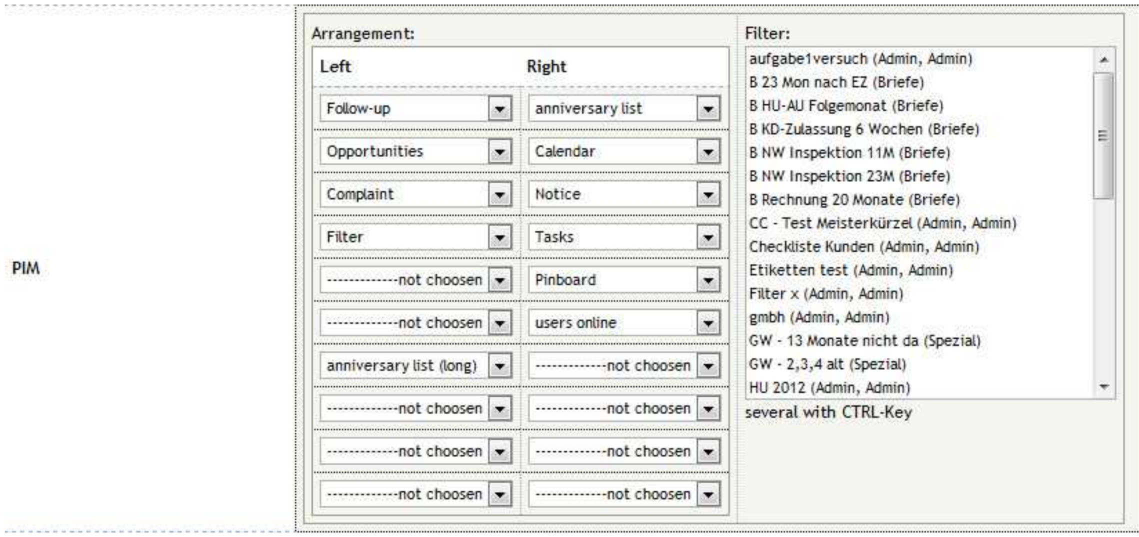


Fig. 3.3: Personal settings 3

Use the *PIM* area to specify the individual PIM components and layout. Select the Lists of filters if you wish to display them here.

Path to documents folder must be left empty if no local default drive points to the CRM documents folder. This option must be set by the administrator

In the area *more,* you can enter the number of records in the call centre call-back alert and the time it takes to display contents as a mouse passes over a window.

3.2 Master data / Customer groups

The administration of *Customer groups* in the *Management* menu is used to categorize clients and prospects. Each customer, prospect, or business partner record can be classified into any number of customer groups. These groups can be created and modified as required. Moreover, each group can be assigned a position, name, and type. If a group is marked as *private,* its records will not be visible to other users provided the group does not belong to another public group.

If a group is not marked as *active* (unchecked), it will not be available in the group filters selection.

The top line always shows the latest entry. The rank determines the position in the record view of the tab *Groups.* The name and the user-defined category complete the group data.

In short, groups are used to classify and filter different data records.

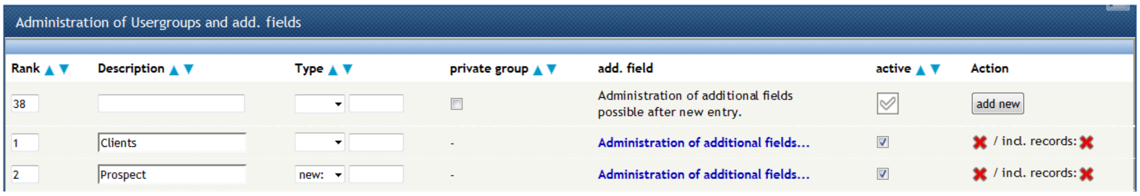


Fig. 3.4: Maintenance of customer groups

3.2.1 Additional fields

For each customer group, you can create any number of additional record (customer, prospect) fields.

After a new group is created, it is still possible to manage any additional fields pertaining to this group record *(Administration of additional fields ...)*. The following table lists all the additional fields. Check the box to assign them to the selected group. Furthermore, you may enter additional fields that will only be valid by default in the current group.

Fig. 3.5: Additional fields

In addition to position and name, you need to specify the field type. Use the selection to introduce the individual target values (link targets). For numbers, text and comment fields, you may enter a size indication, which determines the character length. Comment fields are multiline hence you may specify width and height information, e.g., 80x3. The checkbox determines whether the field is assigned to the selected group. The user will view the input fields in the record view of the tab *Additional data* according to their rank and type. This is so provided that the requested record belongs to the master data group to which the additional fields were assigned. On the other hand, if you delete an additional field, this will no longer appear in other groups to which it may have been assigned.

Data can be imported into additional fields, whose content can be filtered and displayed in the list view.

3.3 Document management

3.3.1 Documents

The menu option *Management / Documents* contains a table with all documents that have been loaded into the system. You can add a new entry directly under the table header. To do so, click first on the *Browse* button to search for a local file. Secondly, enter a *Document name*, *Category*, and one *Group* (group management is available under *Document groups*), and determine whether the file is approved for mail-merge and e-mailing. Finally, click on *Add new* to save the document.

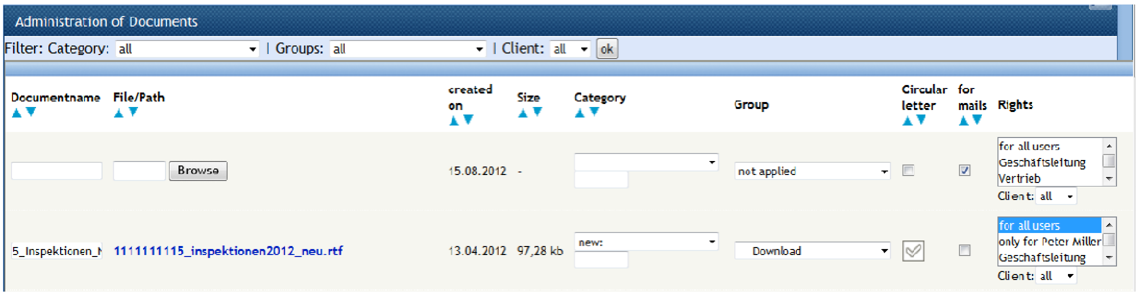


Fig. 3.6: Document maintenance

Each document can be sorted into a hierarchy of folders (groups) for easy retrieval at any time. These groups may be managed under *Administration / Categories*. Go to the *Rights* area to specify which user groups will have access to this document – please note that multiple-selection is possible with CTRL.

If *E-mail* is checked, this document will be later available as an e-mail attachment.

If Mail-merge is checked, you will need to search for mail-merge substitution fields in the next step, as the document fields will be combined with the corresponding CarloCRM database fields during mail-merge. Mail-merge documents must conform to the Rich Text Format. In the document, field assignment is shown with double angular brackets (e.g., <<vorname>> or <<telefonnummer>>). The fields matched above will be listed after upload. Based on the field name, CRM performs and automatic mapping that can be later changed or extended by the user. In addition, you may specify the value format.

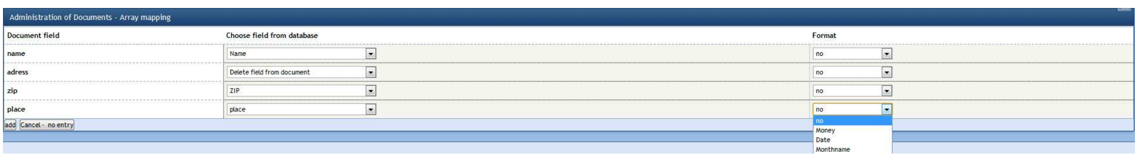


Fig. 3.7: Field mapping

The following fields are additionally available – and automatically filled without mapping - for the creation of mail-merge documents:

<<datum>>	current date
<<mitarbeiter>>	first name and name of the logged-in user
<<Mitarbeiter_telefon>>	telephone number of the logged-in employee as provided in personal settings
<<Mitarbeiter_email>>	E-mail address of the logged-in employee as provided in personal settings
<<Mitarbeiter_info>>	employee information provided in field signature 2

In addition, the following user management information is available:

<<mitarbeiter_fax>>

<<mitarbeiter_mobilfon>>

If a field can only be dynamically replaced in the document by a field from the filter selection, the selection *Select later from filter* applies. This is useful for fields that are outside the master data scope, which will be applied automatically. Please note that the corresponding data fields were entered in the list view of the filter results (drag the data field in the filter wizard to the list). Furthermore, matched fields will be deleted when generating mail-merge letters *(Delete field from document)*.

After clicking on *Submit,* the mail-merge document is ready for further processing and appears in the list of stored documents.

Documents can also be retrieved from the list. To that end, click on the file name on the second column.

Use the red cross in the last column to delete documents.

3.3.2 Document groups

Document groups provide an opportunity to classify documents and files in an arbitrarily deep hierarchy of document groups. Each new entry is assigned a document group in the first line. Besides *position* and *name,* this newly created group can be subordinated to any other group. If the new group must appear at the top level, the *Top group* entry must be selected (default selection for a new entry).

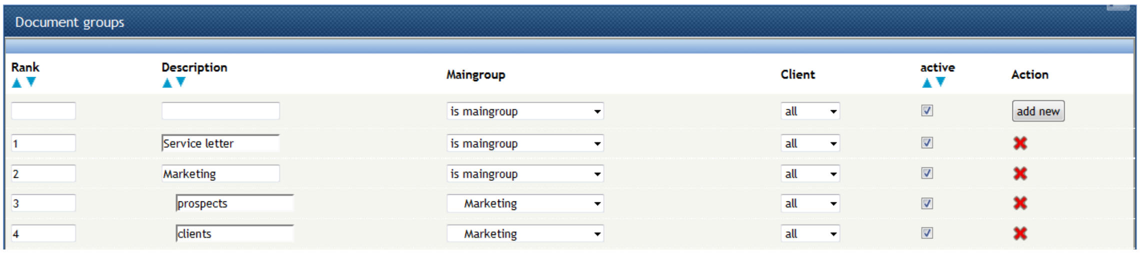


Fig. 3.8: Document groups

All existing groups already in the system are listed below line by line. The group hierarchy, position, and name can be changed at any time. If the active box is unchecked, this group is not available for selection in the program modules.

Before deleting a group, please verify the placement of the documents under such group.

3.3.3 Document display

The menu option *Management / Document display* will show a list of all existing CRM mail-merges classified by document group. Click on the blue mail-merge name to open the original document.

3.3.4 Circular letter / Filter

Besides the creation of mail-merges in the list view, you may establish predefined launch times in the menu *Management / Circular letter filter*. Thus, for customers in the selected filter, the desired mail-merge is automatically generated via macro execution. A correspondence entry is stored for each customer record. For letter printing, the responsible employee must go to *User / Outbox*.

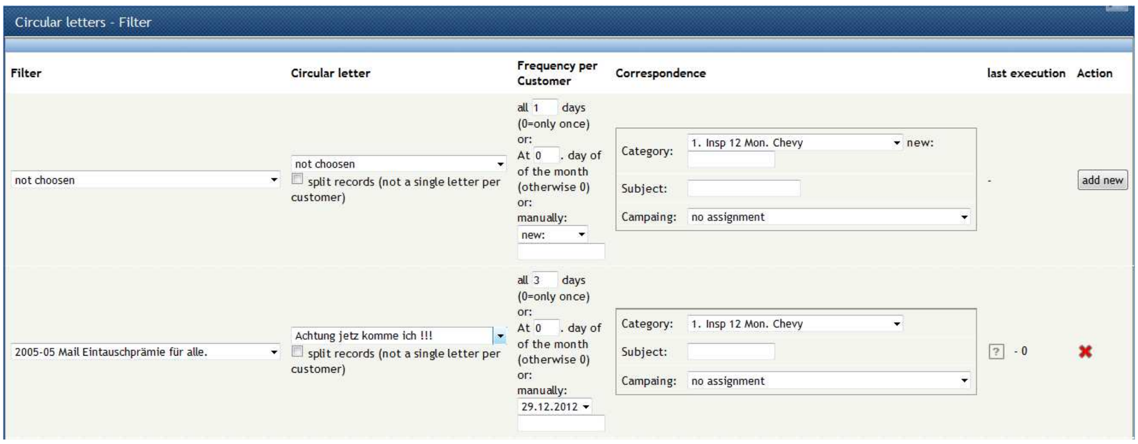


Fig. 3.9: Circular-letter / filter

If you enter *Frequency per customer* and select an existing category or create a new one, this filter-mail-merge link will be displayed in the menu *Manually circular letter* and can be manually started from there.

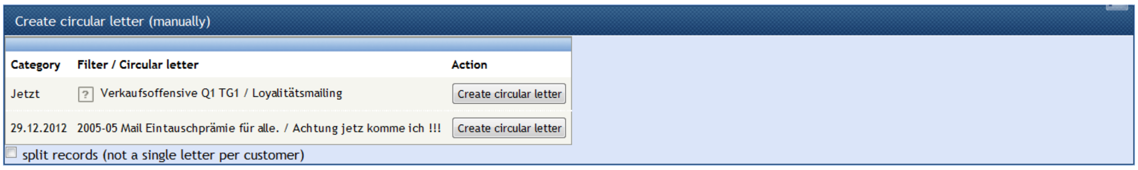


Fig. 3.10: Manually circular letter

3.3.5 Created circular letters

A listing of all the created mail-merges can be found under *Management / Created circular letters*. Here, creation date, responsible user, document name, and associated filters are displayed. Use the red X in the *Action* column to delete this entry and remove the correspondence for the relevant customers. If you wish to delete the document alone, choose *Without correspondence*.

Fig. 3.11: Created circular letters

3.4 Campaigns

In CRM, campaigns are used to perform planning and analysis of contact processes.

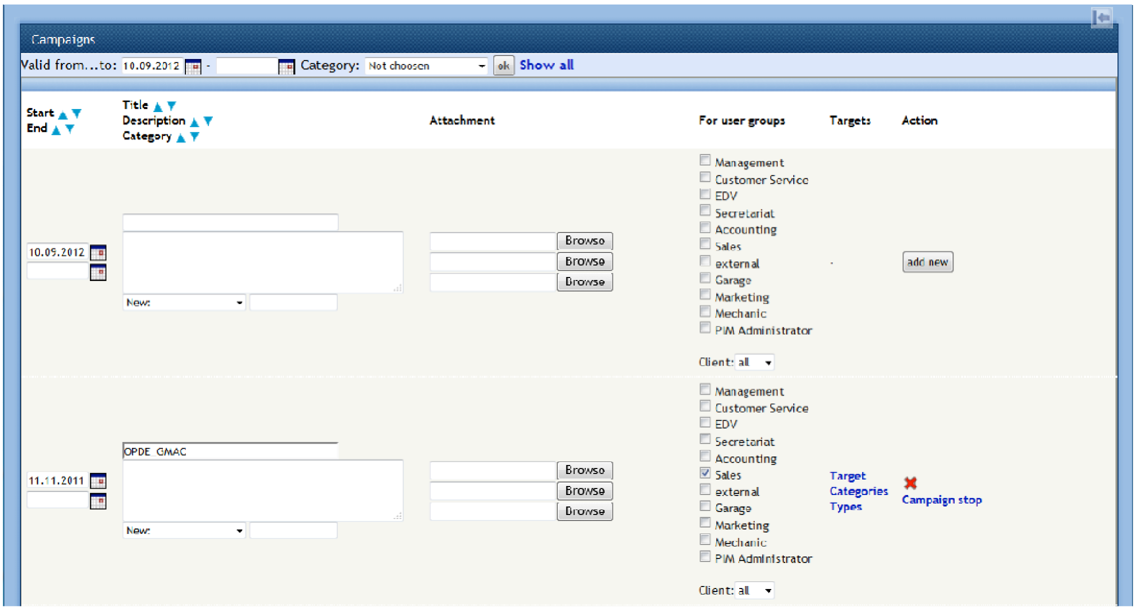


Fig. 3.12: Campaigns

Each contact process can be linked to a campaign, which can be defined in the menu option *Management / Campaigns*. New campaigns are entered in the first line while existing campaigns are shown below.

The campaign fields *Start* and *End* date determine whether a campaign is available for selection. On the other hand, you may leave the date fields empty so that the campaign validity start lies in the past or is considered unlimited. The *Title* appears in the campaign selection as soon as a contact process is created and the *Description* field can hold any necessary details. Furthermore, you can add up to two *attachments* through the *Browse* button. Finally, campaign access can be controlled via *User groups*.

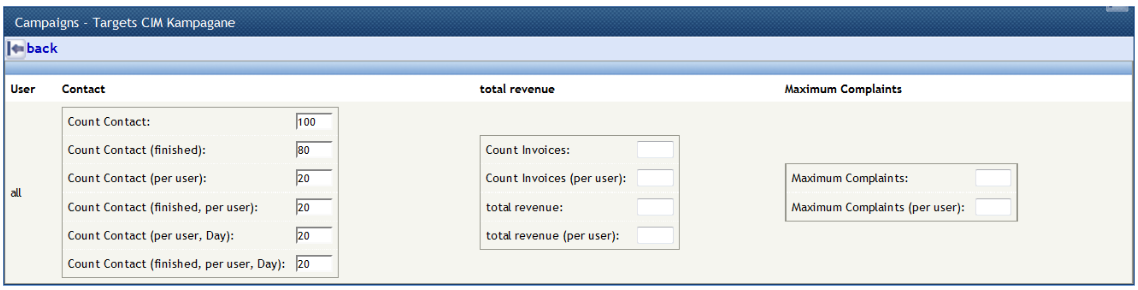


Fig. 3.13: Campaign target values

Once your new campaign has been created, click on the *Target Values* link to the right to introduce the desired campaign targets including:

Count contacts:	total number of contacts of all employees for this campaign

Count contacts (finished):	only completed contacts
Count contacts (per user):	all contacts per employee
Count contacts (fin., per user):	only completed contacts per employee
Count invoices:	total number of accounts for all employees during the campaign
Count invoices (per user):	number of accounts per employee
Turnover:	total sales of all employees for the campaign
Turnover (per user):	sales per employee
Maximum complaints:	total number of complaints
Maximum complaints (per user):	number of complaints per employee

If these values are entered, they appear in campaign reports showing under or over-achievement in red or green respectively.

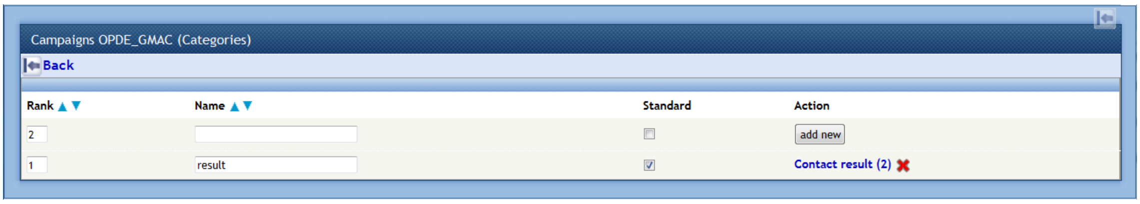


Fig. 3.14: Categories

Use the *Categories* field to create a standardized correspondence process. This is further supported by adding *Contact results*.

In addition, one can define a second, larger category through the *Types* field. This provides the user with a second selection field.

The sum of all correspondence created for this campaign customers will be entered in the Action column.

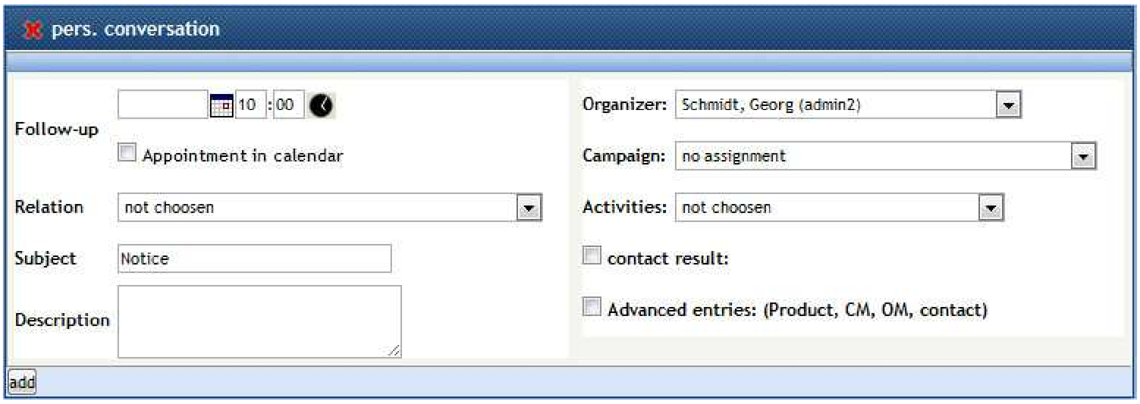


Fig. 3.15: Correspondence entry

If you open a new correspondence for a given customer and select a campaign, the corresponding standardized selection options appear in the category. Category results shows all contact results pertaining to this campaign.

3.5 Events

The event function is used to plan events, manage people status (from the invitation to participate), and produce event reports. As with campaigns, contact processes can also reference events.

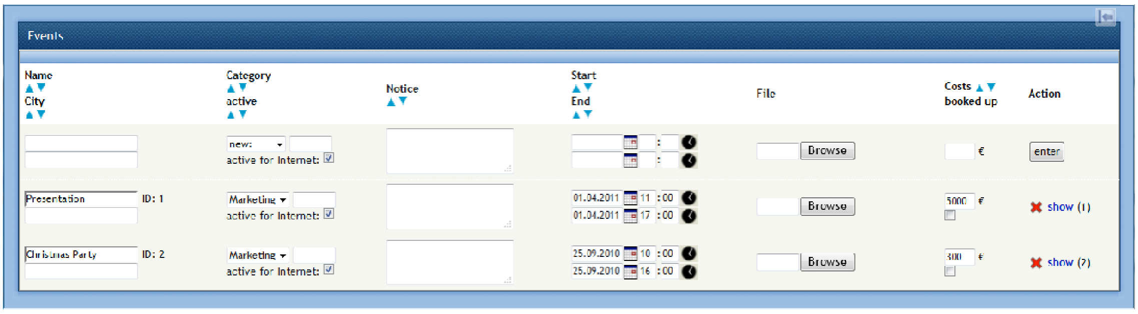


Fig. 3.16: Events

After calling the menu item *Management / Events*, you can add new events (in the first line) and modify existing ones (shown below). The name is a mandatory field and appears wherever an event is referenced. Location, comment, and category can also be entered. Start and end indicate the event duration. On the other hand, events support file attachments. Furthermore, the cost and the state – e.g., whether the event is fully booked- are also maintained. If the events module is Internet-enabled (e.g., Web site), check the box *Enabled for the Internet* to indicate any Internet-execution eligible events.

You can delete an event using the Action column to the right. Furthermore, you may view all people involved in a particular event by clicking on the link *Show list*.

3.6 Categories

The menu item *Administration / Categories* allows managing categories for the different program modules. Categories are available for selection as required throughout the system. For example, in contact processes, we find the correspondence category to help define new entries. After selecting the module, all previously entered categories will be displayed and the first line will be available for new entries. The number below *Usage* indicates the number of records (e.g., number of contact processes) where this category was chosen.

Fig. 3.17: Categories

For existing categories, you can select from two options under *Action*. Click on the red X to delete a category. Keep in mind, however, that this is only possible if the category is not in use. Otherwise, overwrite the linked records with other existing category and then remove the old one.

3.7 Salespersons

In the menu item *Administration* / Salesperson, you can transcode salesperson numbers (especially in VW-brand dealers) in plain text, so that CRM shows the full name rather than the pure salesperson number.

3.8 ABC settings

Using ABC categorization for overall statistics in the customer overview requires replacing the installation default settings under menu item *Administration / ABC settings* with your own. Any ABC calculations take place at night.

ABC customers are classified as new car, used car, parts, and workshop customers. The criteria underlying this classification include characteristics such as customer sales, visits, and title. Customers can be further divided into private and corporate customers, which are differentiated by their address / salutation.

3.9 Funnel settings

A sales funnel is used to gradually reduce a large customer population to a manageable size in a manner reminiscent of a funnel or a sieve. In this case, you may introduce up to six filters or constraints. The result can be found in the *Sales funnel* under the menu item *Action*.

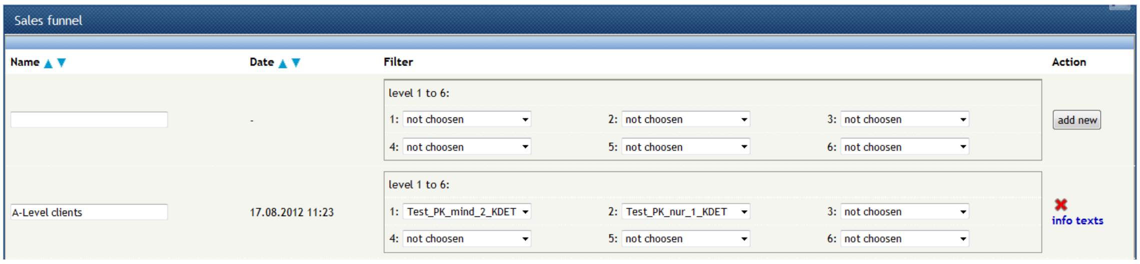


Fig. 3.18: Funnel Settings

3.10 LeadIT settings

During LeadIT configuration, it is necessary to define LeadIT access rights in the *Administration / LeadIT settings* area. This offers the following configuration options:

Number:	Number of accesses to download LeadIT
Active:	Enable LeadIT access
Notification:	Name of the CRM user to be informed of incoming leads with a task.
XSF user / Password:	Access data for the OPEL Firewall
User / password:	User name and password for lead retrieval of the company
Assignment:	Storage location code to which the leads will be assigned in CRM
Dealer:	Dealer number (e.g., DE1000.00)
E-mail:	Overwrites the e-mail addresses information in LeadIT (persons who are directly informed by LeadIT of new e-mails)
Status:	Indicates whether the access works or shows eventual error messages

All fields marked with (2) are related to the second establishment. The display of the number of entry options depend on the value of the first *Number* field.

At the end of the list, a GMAC dealer number is entered to issue financing requests and retrieve the corresponding response from the bank in CRM.

3.11 Retrieval of vehicle exchange information

In CRM, you may transfer your prospect inquiries to the following vehicle exchanges:

- pkw.de
- mobile.de
- autoscout24.de
- opelautoboerse.de
- opel.de
- gebrauchtwagen.de
- webmobil24.de.

Links to other exchanges can be requested to CRM support.

3.11.1 Conditions

To retrieve information from vehicle exchanges, the dealer must complete the following preparations:

- Create a separate E-mail address, for example inquiry@autohaus.com and provide the POP3 data:
  - Server / IP Address
  - Login
  - Password
- Configure a vehicle exchange account accordingly so requests are directed to this e-mail address
- Enter the POP3 data in CRM under *Administration / General settings* in the *E-mail retrieval (POP3)* area.
  - for queries to different storage locations / clients, define POP3 data per storage location / client

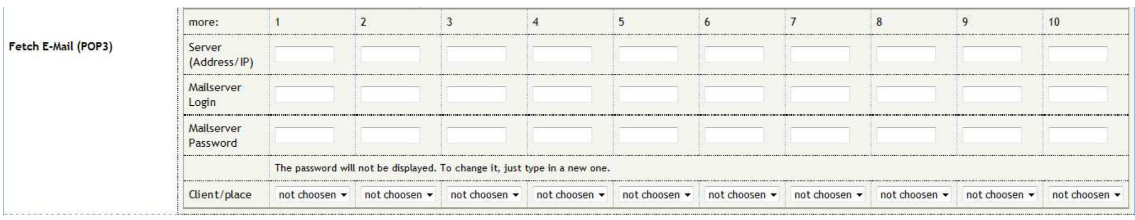


Fig. 3.19: E-mail retrieval - Settings

Requests are retrieved every 15 minutes and listed in the menu item *Action / LeadIT* under own campaigns.

3.12 Retrieval of contact form information

If so desired, requests can be presented under *Action / LeadIT* using the contact form on the dealer’s website.

3.12.1 Requirements

The requirements for the retrieval of contact requests are:

- Create a separate e-mail address, for example contacts@autohaus.com and provide the POP3 data
    - Server / IP Address
    - Login
    - Password
- Configure the website’s customer account so that requests are directed to this e-mail address
- Enter the POP3 data in CRM under *Administration / General settings* in the *E-mail retrieval (POP3)* area.
    - for queries to different storage locations / clients, define POP3 data per storage location / client

To introduce dealer-specific customizations, please send a test E-mail to CRM support.

3.13 Vehicle management

Under Administration, you will find the menu item for Vehicle management.

In CRM, the maintenance of vehicle data is relevant because the underlying table is used during the introduction of blank offers and sale contracts but also in numerous reports (sales process analysis, sales goals, self-potential analysis, charting kit).

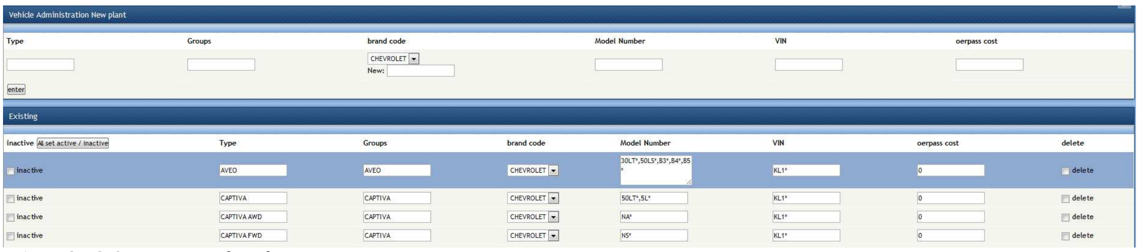


Fig. 3.20: Vehicle management

By default, this table is filled as CRM is installed. However, you may also use the first line in the table to introduce additional vehicles in the system. During the configuration of new cars with the OPEL configurator, defined transfer costs will be automatically included in offers and sale contracts.

Is the type of vehicle is marked as inactive, it will no longer appear in the sale contracts list or in sales process reports.

3.14 Type-Model list

In the VW environment, this list is used to translate the six-digit type-model code into plain text, as this is not transmitted from the source systems (except Carlo) by default. To ensure uniqueness, it is advisable to enter the first three characters of the VIN number in the *Construction year* column; if several exist, separate them with commas.

This transcoding is then shown in separate views.

3.15 Prospect creation form

Fields in the new customer form can be defined as mandatory by marking the corresponding checkbox. A distinction is made between private and corporate clients. This setting is available in the menu item *Administration / New prospect form*.

3.16 General settings

The system allows the definition of individual and customizable settings which include, amongst other, E-mail server data.

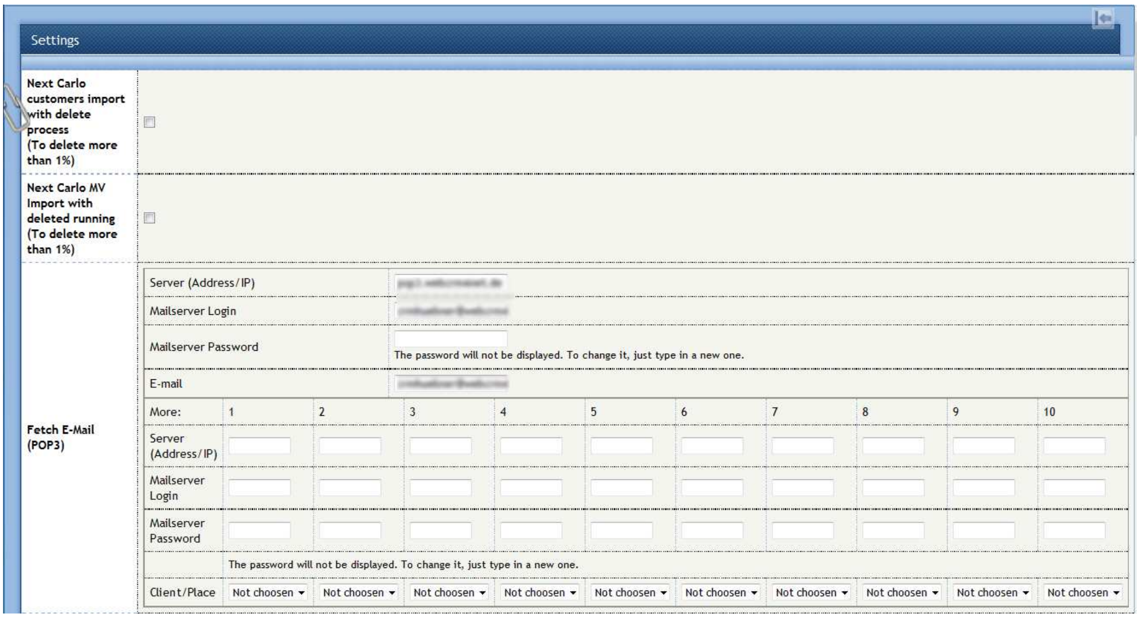


Fig. 3.21: General settings

3.17 Clients

After calling up the appropriate menu item under *Administration*, client management appears. The user can enter the name in the first line and click on *Add new* to create a new client. All existing clients are displayed in the lines below, where extended company data (address, postal code) can be introduced.

In master data management, each record is assigned to a client linked with the dealer management system. Use the User management function to determine the accessible clients per system user.

3.18 Additional calendar

In addition to the personal calendar, you can use the menu item *Administration / Additional calendar* to create additional calendars such as a room availability calendar or a service actions calendar.

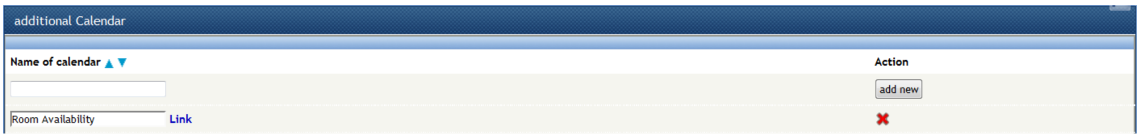


Fig. 3.22: Additional calendar

The first line is provided for the new entry of such a resource (enter it by clicking on Add New).

All additional calendars are listed below. These can be accessed by clicking on the link to the right of the name. On the other hand, you can click on the red X to delete the calendar for this entry.

To share this calendar with others, it is necessary to create a new menu item. To that end, copy the link-address of the calendar and paste it in Administration / Menu items. Finally, you will need to configure the user rights accordingly.

3.19 Leasing companies

Here, you can maintain various CRM IDs in the VW environment including for example leasing and insurance companies. Among the companies stored there, it will be verified the identity of the vehicle owner and the invoice recipient. If these do not match, the invoice will always be assigned to the vehicle owner.

The purpose of this function it is to be able to assign invoices in a fair manner.

3.20 E-mail management

CarloCRM offers several possibilities for E-mail submission.

3.20.1 E-mail toolkit

This feature allows sending standardized E-mails directly from the customer overview with a customer reference. The template is created once and can be reused at any time by all users.

3.20.1.1 Settings

Management / E-mail toolkit allows defining an E-mail template which can be accessed later from the customer overview.

Fig. 3.23: E-mail Toolkit - Settings

The first column *Category / Designation* is mandatory. It is possible to form subcategories separating them with the character "/". In addition, you may generate selection queries by adding three underscore characters and a query sign at the end of your expression, e.g., *Sales / Invitation / Is the customer satisfied with us?___Yes*. Please note that all questions / answers entered here constitute a prerequisite for e-mail creation.

In the *Subject* column, enter E-mail subject line.

In the *Description* column, enter e-mail using the selection fields.

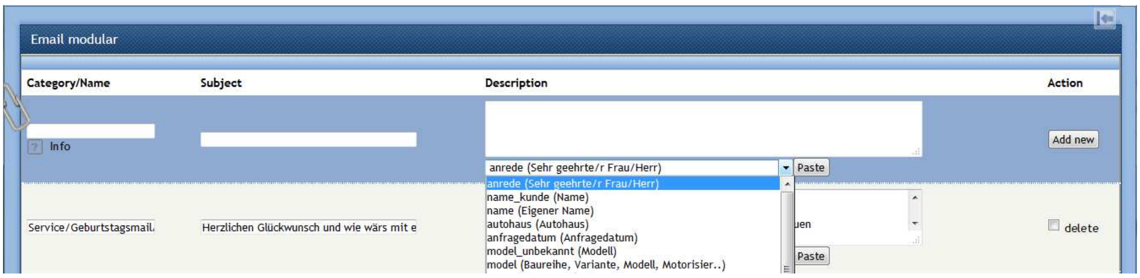


Fig. 3.24: E-mail Toolkit - Settings / Description

salutation: Salutation from master data

customer_name:	Customer name from master data
name:	Name of the logged-in user
car_manufacturer:	Name of the car mfg. from mandatory administration
unknown_model:	Vehicle models from the CRM vehicle administration, which are maintained under the OPEL brand
Model:	Vehicle models from the CRM vehicle administration, which are maintained under the OPEL brand
model_vorschlag:	Vehicle models from the CRM vehicle administration, which are maintained under the OPEL brand
date_weekday:	Select box weekday
Date & Time:	Selection box time
phone number:	Phone number from the personal settings of the logged-in user
E-mail:	E-mail address from the personal settings of the logged -in user
signature:	Signature from the personal settings of the logged-in user
directions:	Directions from the personal settings of the logged in user

All other fields are free text fields that must be filled during text entry.

Once the e-mail is created, you can save it by clicking on *Add new*. Later on, you may change or delete it using this menu item.

Use the *E-mail Submission* area under *Administration / General Settings* to specify the e-mail program used by the employees. For example, if Thunderbird is the corporate e-mail option, you must select *E-Mail Program 1* to ensure the correct presentation of the text, *E-mail Program 2* for Outlook, etc.

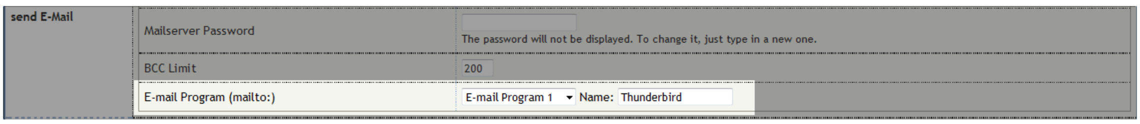


Fig. 3.25: E-mail Toolkit - Settings / E-mail Program

3.20.1.2 E-mail

The point *E-mail submission* can be found in the area Quick correspondence of the Master data tab.

Fig. 3.26: E-mail toolkit - E-mail submission

Click on it to open a new window.

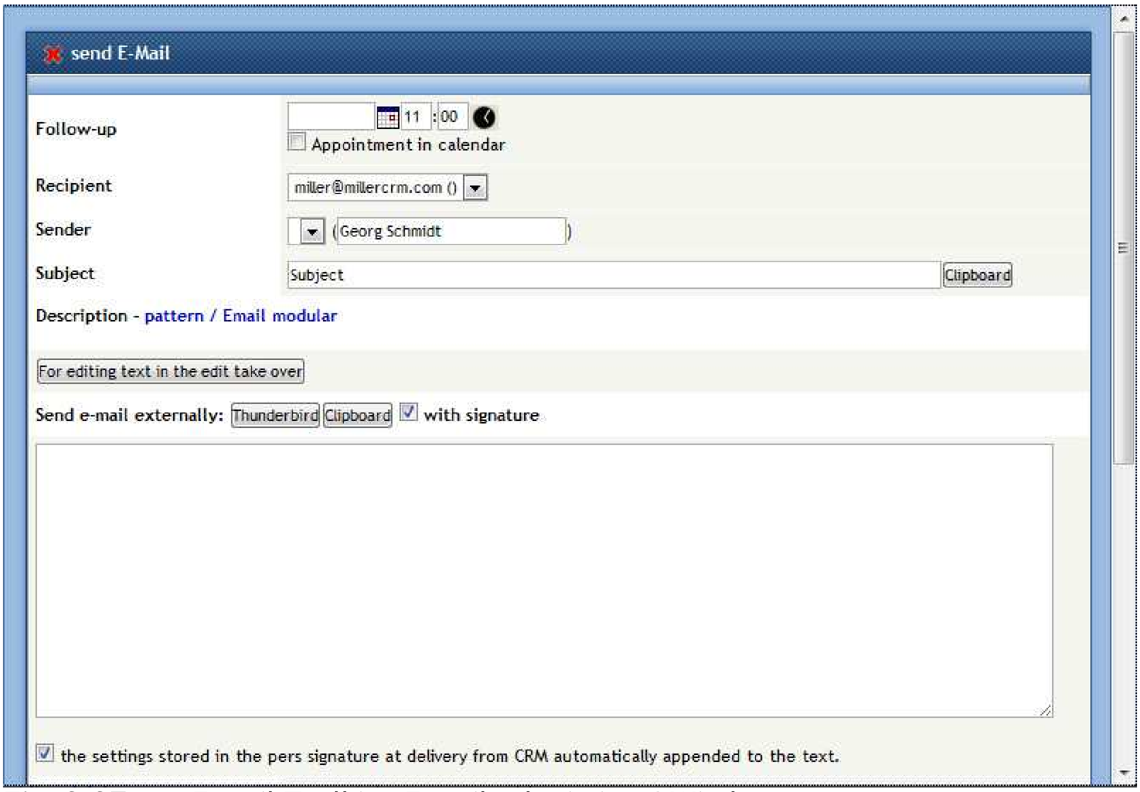


Fig. 3.27: E-mail Toolkit – E-mail submission / Window

Follow-up:	Automatic reminder to follow-up with the customer on that date. This field must be maintained when creating a correspondence reference to a lead, as this is thereby closed and no open WVLs would remain otherwise
Reference:	Creation of a reference for an open correspondence
Receiver:	Selection of the right E-mail recipient address
Sender:	Selection of the right E-mail sender address
Subject:	E-mail subject line

Fig. 3.28: E-mail Toolkit – E-mail submission / Description

Description - Template / E-mail toolkit:

Display of all OPEL-provided standard e-mails and his own, before the templates created in the E-mail toolkit

Fig. 3.29: E-mail kit - E-mail submission / Open template

This opens after clicking on the template name. All fields marked with diamonds must be edited.

Text to be edited...:	Processing option of e-mail text
External E-mail submission:	
Thund./Outlook:	E-mail submission through the external e-mail program
Clipboard:	Temporary storage of the text in Internet Explorer
signed:	Transfer of CRM signature in the e-mail program
HTML Email:	Sending an e-mail in HTML format
Attachments:	Selection of RTF documents previously uploaded into CRM using Administration / Documents
Customer attachments:	Selection of documents available in the correspondence tab of the customer
additional attachments:	Additional options to upload e-mail attachments
Campaign:	Campaign selection
Attachments:	Selection of files that were previously loaded into the campaign manager of CRM
Contact result:	Additional description and results information
Extended entries:	Creation of a reference for vehicle, invoice, complaint and / or offers and sales contracts

Click on *Enter* to send the E-mail. As you do so, a new correspondence entry is displayed for the customer.

3.20.2 E-mail templates

E-mail templates are provided for mass-mailing of newsletters to a pre-filtered group of customers. You may view all pre-built templates under *Management / E-mail templates* and create new ones if so desired. Here, a distinction is made between the use of templates created earlier with a different editor and the creation of new templates.

3.20.2.1 Using an existing template

For existing templates, the source code must be shown (right click – *Display page source*) and copied.

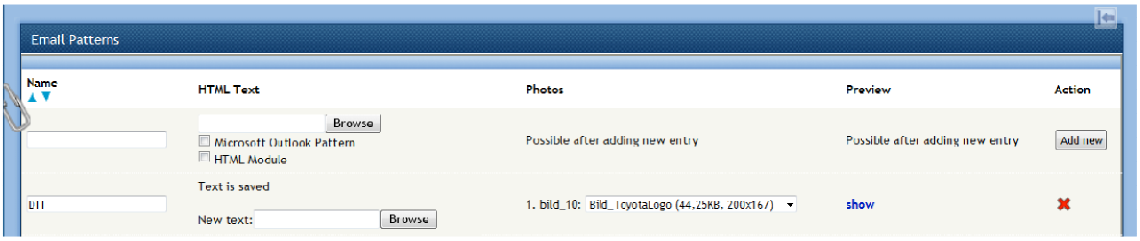


Fig. 3.30: E-mail Templates - Pre-existing template

In CRM, enter the name of the newsletter in the column *Name* and click on *Add new*. As you do so, the column *HTML Text* shows the word *Editor* in blue. Click on it to open the Editor.

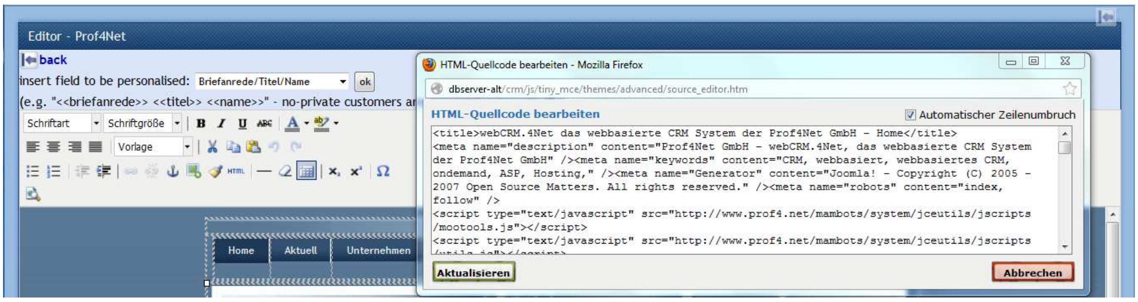


Fig. 3.31: E-mail Templates - Edit existing template / source code

Click on the button *HTML* to open a new window. Paste here the previously copied source and click on *Refresh*. This will display the template in the CRM editor for further processing. Any images not displayed because they are not available on the Internet must be subsequently assigned to the newsletter.

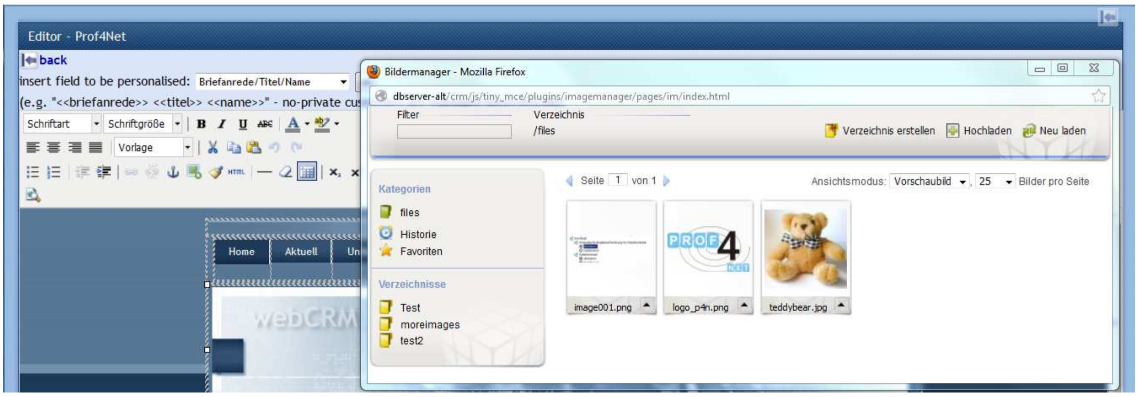


Fig. 3.32: E-mail Templates - Insert existing template / image

To do this, click the *Insert Image* button on the editor. There you have the opportunity to use existing images or save new ones using the *Upload button*.

Click on the *enter/change* button at the end of the page to save.

Alternatively, you may load into CRM the existing HTML template for further processing using the *Browse* button.

3.20.2.2 Creating a new template

If you wish to create a new newsletter, enter first a name under *E-mail templates* and click on *Add new*. Click on *Editor* to build your template.

Use the replacement fields to personalize the recipient. To format texts, users may utilize the corresponding fields or open and edit said texts by clicking on the button *HTML source code*. Likewise, images may be inserted by clicking on the *Insert images* button.

The newsletter is immediately available after clicking on *enter/change*.

3.20.2.3 Newsletter submission

For the massive submission of CRM-stored templates, it is necessary to use a filter with the corresponding customer group. You may find all existing templates in the results list of the tab *E-mailing*.

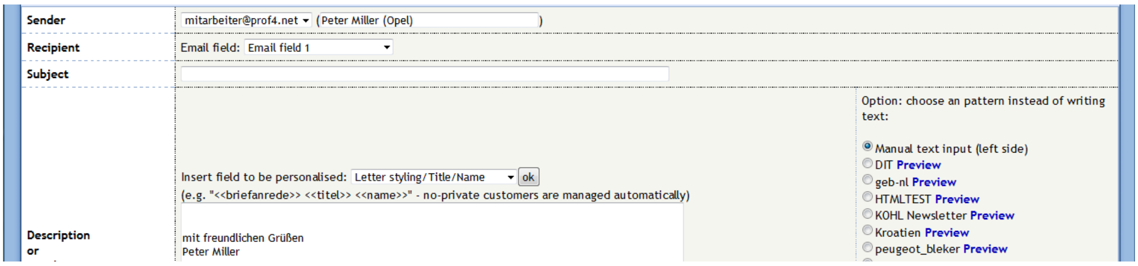
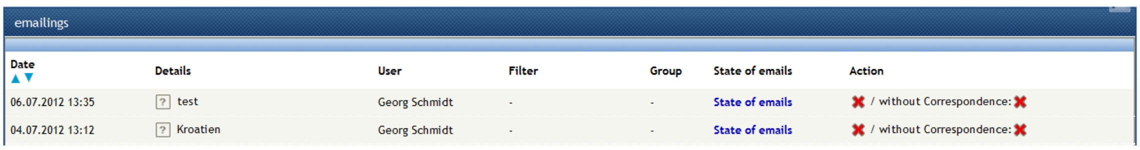


Fig. 3.33: Newsletter submission

Click on a template to use it for e-mail submission. You must enter a subject line and add any attachments to be sent along. As you click on *Launch E-mailing*, the mailing is generated and sent.

3.20.3 E-mail status

Submitted e-mails can be found under the menu item *Management / E-mail status*.


emailings

Date	Details	User	Filter	Group	State of emails	Action
06.07.2012 13:35	test	Georg Schmidt	-	-	State of emails	/ without Correspondence:
04.07.2012 13:12	Kroatien	Georg Schmidt	-	-	State of emails	/ without Correspondence:

Fig. 3.34: E-mail status

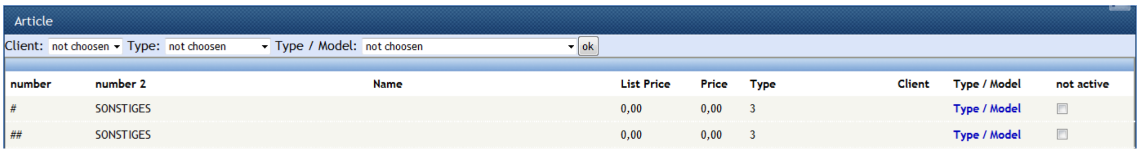
In addition to the *Submission date*, *Name* with preview, *User* and the associated *Filter*, you may review the E-mail *Status* here. Click on the name to view whether the E-mails were successfully submitted.

The *Action* column offers two entry cancellation options.

On the one hand, if you click on the red *X*, the e-mail is deleted from this list and the correspondence records of all related customers are removed. On the other hand, if you choose *Without correspondence*: *X*, the E-mail is deleted from this list but the entry in the customer correspondence is retained.

3.21 Product management

Under the menu item *Management / Product management*, it is possible to enter products to be selected during the creation of quotes and sales contracts under *Additional dealer installations*. To that end, a CSV file with names and prices must be loaded.


Article

Client: not choosen Type: not choosen Type / Model: not choosen ok

number	number 2	Name	List Price	Price	Type	Client	Type / Model	not active
#	SONSTIGES		0,00	0,00	3		Type / Model	
##	SONSTIGES		0,00	0,00	3		Type / Model	

Fig. 3.35: Product management

The release of the item for certain type of models is done in the same column. Check the box and click on *enter/change* to save. If no dealer installations are available for selection, the box in the *Inactive* column is set.

4 Record search

CarloCRM offers several ways to search for and find customers and prospects.

Besides these search options, records may also be retrieved from other modules such as the Personal Information Manager (PIM) or the Lists view.

4.1 Free text search

To the right of the menu bar at top of the screen you can find a search box. Search is automatically launched after entering three characters or more. Alternatively, the magnifying glass right next to it also starts the search process.

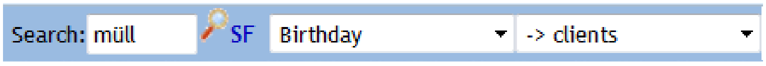


Fig. 4.1: Search box

The search is conducted first on the selected filters. If, for example, the filter group "customers" is selected, only contacts pertaining to the customer group will be shown. Now, if a saved filter (e.g.,"New customer?" in the middle filter box) is selected, the contacts from the customer group can be further restricted to all customers from the new customers filter. In addition to these two features, you may still enter a customer name in the free search box (e.g., "Brown") to further restrict your search. Now, all contacts of the customer group selected through the new customers filter that begin with "Brown" are selected.

You can search by first name, name, and company name from the master data and contacts, as well as by vehicle license plate. By default, all names / companies showing one character after the search word will be found (e.g., Bro finds Brown and Broderick). By using an asterisk (*), an additional character can be inserted before the search word (e.g., *urns finds Burns and Turns). In addition, the "?" character can be freely used as a wildcard in any position (e.g., B?ns finds Burns and Berns). If several search words are entered separated by spaces, such words are combined into a single search word (logical AND). If the search word is a number, the search is conducted by record or prospect number, which will also appear in the record view beneath the record name.

Search results are displayed in a smaller window within the main area, which closes with the red X.

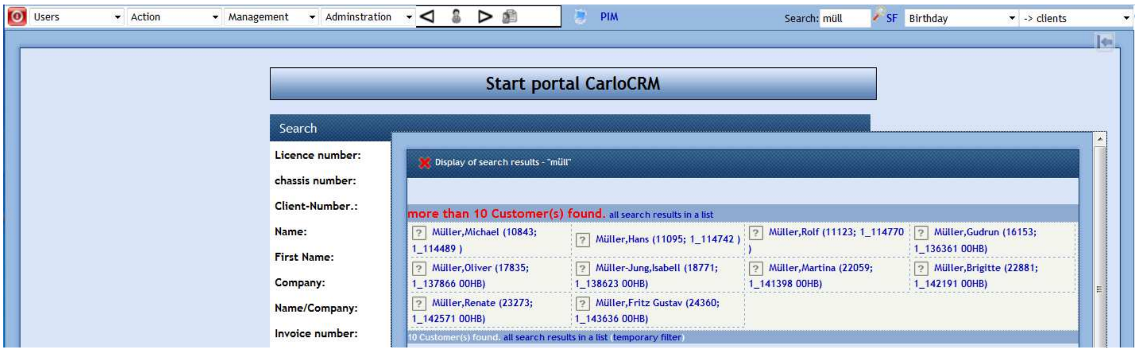


Fig. 4.2: Results of search filters

A maximum of ten records will be shown. If further records are found, these can be displayed in the list view (link *All search results in list)*. Click on the record to open the individual view *(Overview* tab).

Depending on installation, additional search options may be available, if you click on the link *SF* by the search box. Thus, you may search by first name, last name and company but also by postal code, location, street, and contact information. The search results are displayed separately in the results window.

4.2 The Start portal

The Start portal can be stored as the default home page in your personal settings or you can click on the icons in the CRM menu bar. In the Start portal, you have several criteria to search for records in CRM. The results are displayed in a list below the search field. If you click on a customer name, it takes you directly to the customer overview.

If you check the box *Appointments (car)*, the generated test drives will be displayed alongside the search results.

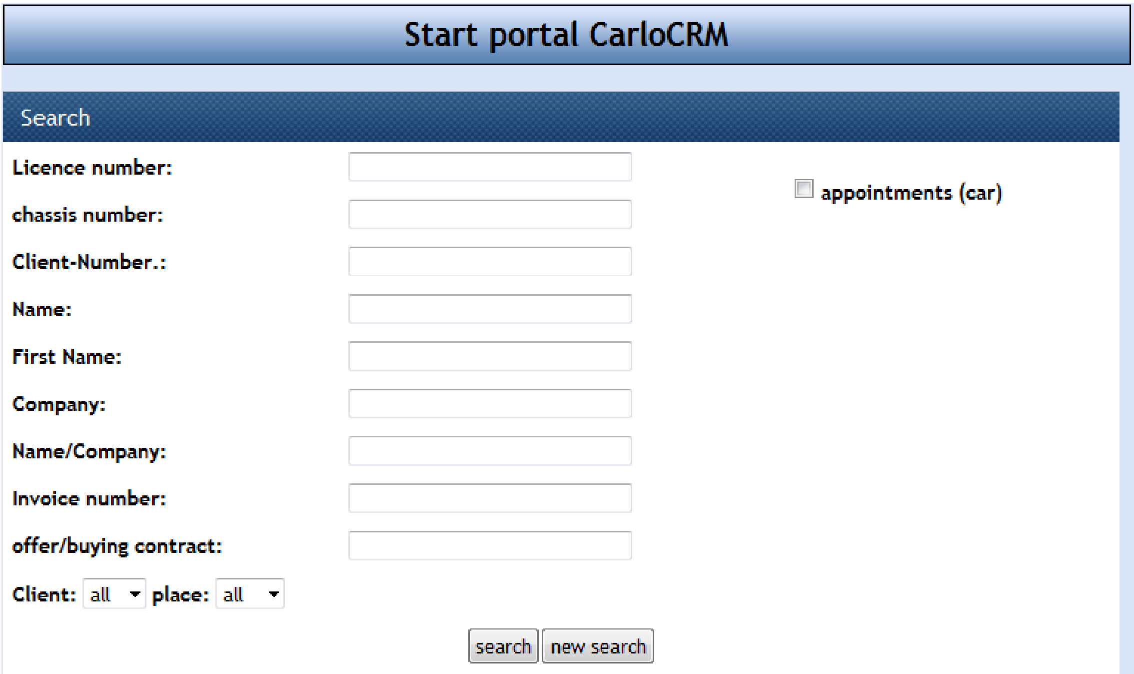


Fig. 4.3: Start Portal

4.3 User-defined filters

Records can be searched on any system table using the filter wizard. This is discussed in a separate chapter.

5 Creation of new records (persons / companies)

Depending on installation, customers may be imported into the system through an interface. On the other hand, new person or company records can be created via the corresponding form. All record data required is discussed at length in the following chapters (record view of individual customer).

5.1 New entry via form

For creating new prospects, select the menu item *Action / New prospect* and decide whether it is a private or corporate customer. Mandatory fields, which are marked with a * and need to be filled during entry, can be defined in *Administration / New form*.

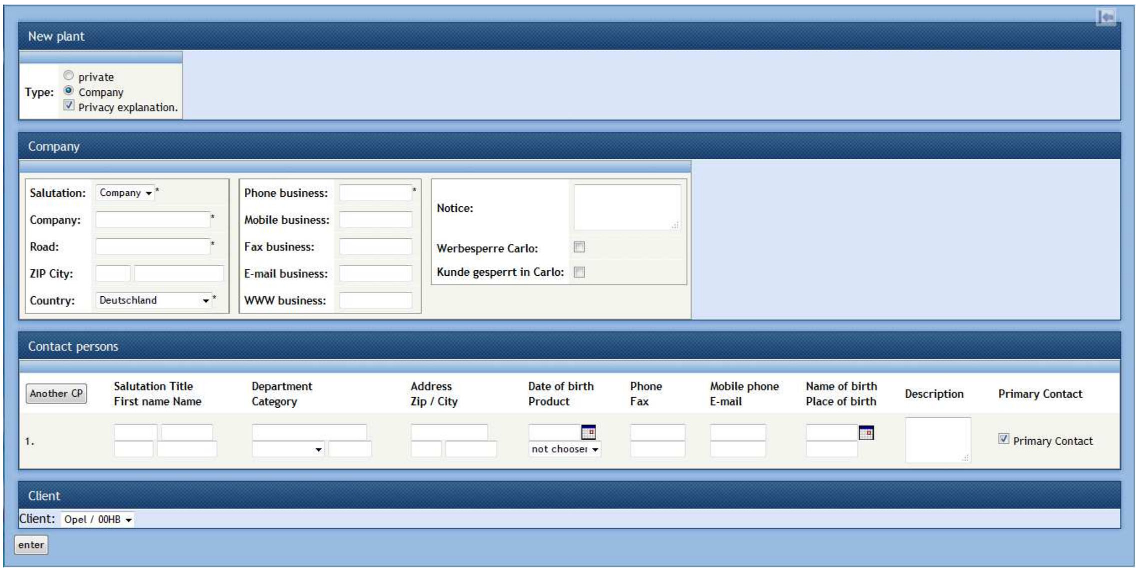


Fig. 5.1: Example of entry form for new customers

As you create a corporate client, you might want to enter contact persons, e.g., employees. Later on, you may expand and modify the customer record in the tab *Additional data.*

After entering the prospect data, select the appropriate client and click on *Enter* to directly access the newly created prospects.

6 Record view of an individual customer

Go to the summary record view to find information on the most important master data, vehicle ownership, correspondence, complaints, etc. The name of the customer retrieved and its record number are displayed directly below the main navigation bar.

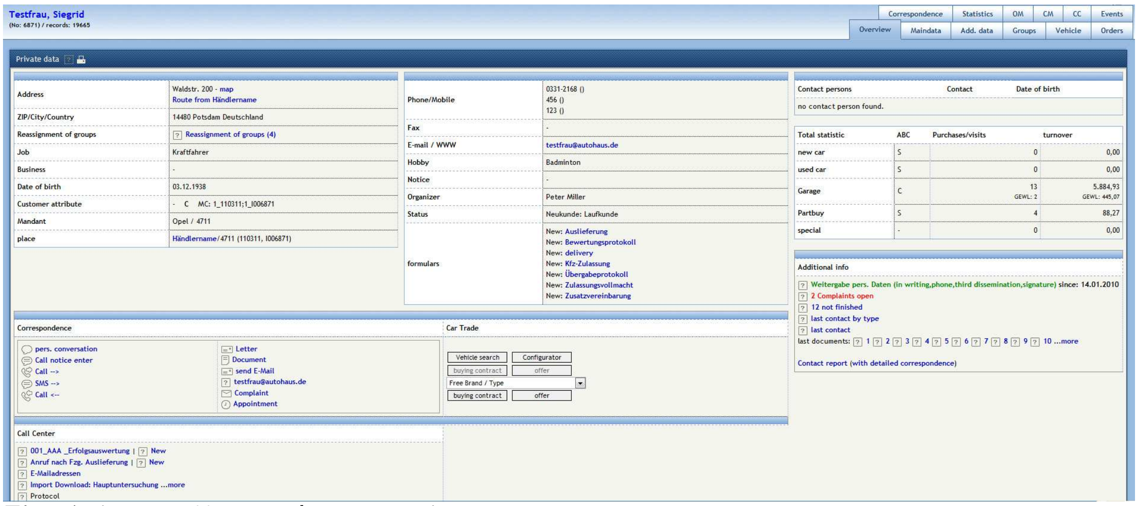


Fig. 6.1: Master data overview

Further detailed information and related functional areas are defined in the various tabs. In addition, to the right of the customer number is displayed the number of records currently found in the database or pertaining to a filter selection process. The user can navigate back and forth within these records with the arrows to the right of the main navigation menu.

The administrator may unlock each record view tab by appropriately configuring the user rights under User administration.

Each tab will be further discussed in the following chapters.

6.1 Overview

The most important record data are displayed here in read-only mode. These include address, contact information (phone number, mobile phone number, fax number and e-mail address), depending on the software version: contacts, statistics, ABC analysis, information on privacy policy, and certain soft factors data.

Below, the last three vehicle purchases, contracts, correspondence, and offers / sale contracts complete the overview. If you move your mouse over the Info window in the sections, additional information such as invoice text or offer date is displayed.

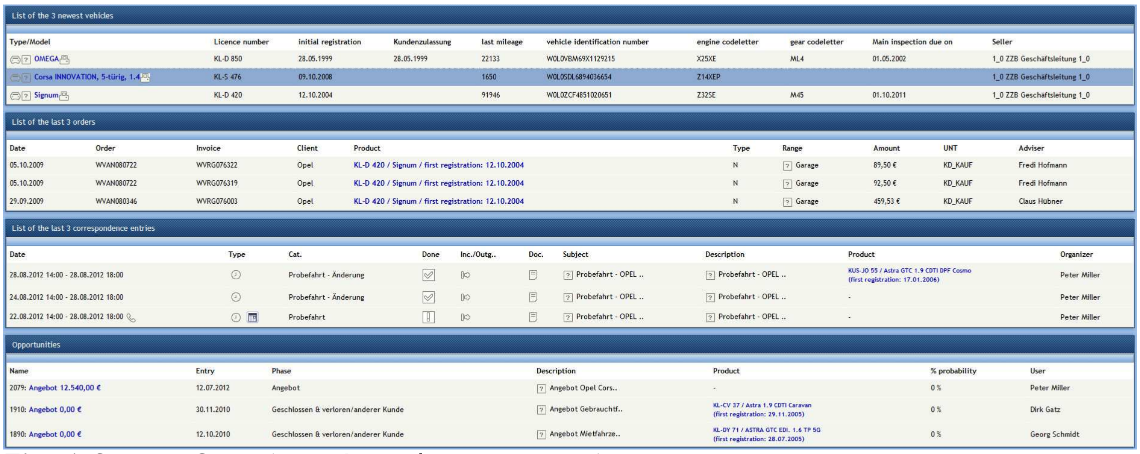


Fig. 6.2: Overview – Last three transactions

6.1.1 Correspondence quick entry

Below the master data, you can find the *Correspondence* block. As you click, the contact process entry form opens in the main panel.

You can enter a follow-up date so that the process is not lost in the employee's PIM until this is completed. Additional entry fields such as subject, description, vehicle reference, and category depend on the contact type. The manager may assign at his discretion another employee to handle the process. Campaigns can be selected so that the process assignment is improved for further evaluations.

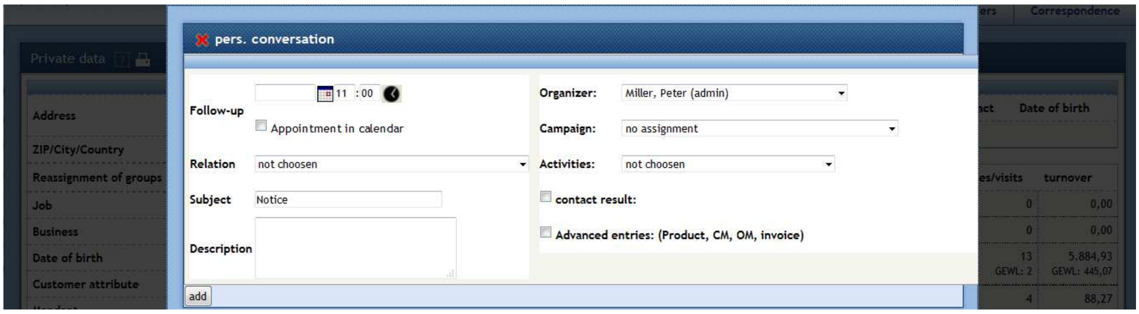


Fig. 6.3: Quick entry of personal interview

Further information on the entry fields can also be found in the detail record for a correspondence entry, which is addressed in the chapter *Correspondence*. The following additional actions are available:

Pers. conversation:	Registration of a personal interview
Call →:	outgoing call
SMS submission:	Prerequisite: salesperson data under Administration / CRM configuration must exist. Here, the SMS is sent from

CRM to the salesperson, who should in turn forward it to the relevant customer.

Call ←: incoming call

Letter: Creation of a letter from a template (see Chapter *Mail-merge / Filter)*. For the automatic transfer of correspondence subject and description, use the following document fields:

<<korrespondenz___betreff>> and

<<korrespondenz___beschreibung>>.

Document: A file is provided, sent from the PC to the server, and added to the contact process

send E-mail: Submission of e-mails with attachments from the CRM system or from local storage

Complaint: Creation of a complaint; further details provided in the relevant chapter

Appointment: Here opens the calendar, which is discussed in the chapter *Calendar;* the customer relationship is established through an appointment and shown as well as a correspondence entry.

6.1.2 Contact person

If record contacts are entered, they appear in a table in a block set in the upper right section. Next to the name and the department, several icons are displayed representing all contact opportunities. Click on these to enter a correspondence record in the correspondence view. To the right, the registered birth date of the contact person is displayed, which incidentally also appears in the PIM birthday list of the respective manager.

6.1.3 Overall statistics

If the summary view is appropriately configured, an ABC customer analysis is presented, grouped by division. This illustrates under which ABC category does the customer fall and what sales and visits have been performed in the last five years by business area.

The ABC analysis data can be stored in CRM. However, it should be maintained by the Company under *Administration / ABC settings*.

6.1.4 Additional information

The block *Additional information* presents open complaints (red) and other contact information, such as the Privacy Statement. As you move the mouse over the text, a small window opens with relevant information.

6.1.5 Vehicle trade

You can go directly from the customer list to the vehicle search or the configurator. A sale contract can be created directly from an open customer offer.

6.1.6 Call center

If this functionality is enabled, you can select a call script and enter the corresponding answers.

6.1.7 Forms

If users have been authorized to access the form function, they will see a link to the *Forms* tab. In addition, all previously entered forms can be reviewed.

6.2 Maindata

This tab allows viewing and modifying a record's master data. The fields maintained here can be referenced later on, for example, during the mass-mailing process.

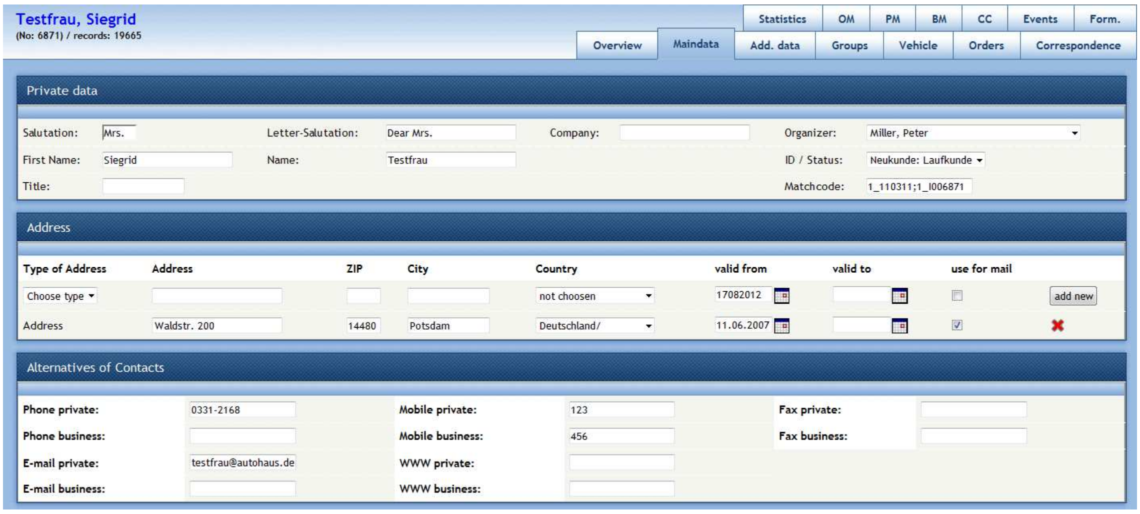


Fig. 6.4: Maindata form

Use the block *Addresses* to enter one or more addresses per record. You may also enter old addresses if you wish to keep a history thereof. To that end, you should fill the validity fields accordingly. On the other hand, at least one address should be marked as *Mailing address*, which will be used during the mail-merge process. As you enter the postal code field in the Status window, the corresponding location is picked out automatically and can be confirmed as appropriate with one click. If several postal codes match your entry, you can choose the correct one.

To add a new address (the top row in the block of existing addresses), press the button *Add new* or alternatively save it by clicking on *Enter/Change* at the bottom. Existing addresses can be deleted with the red X at the end of the line. If you do so, a security question follows.

In the block *Contact options*, you may enter phone and fax numbers, e-mail addresses, and Web pages.

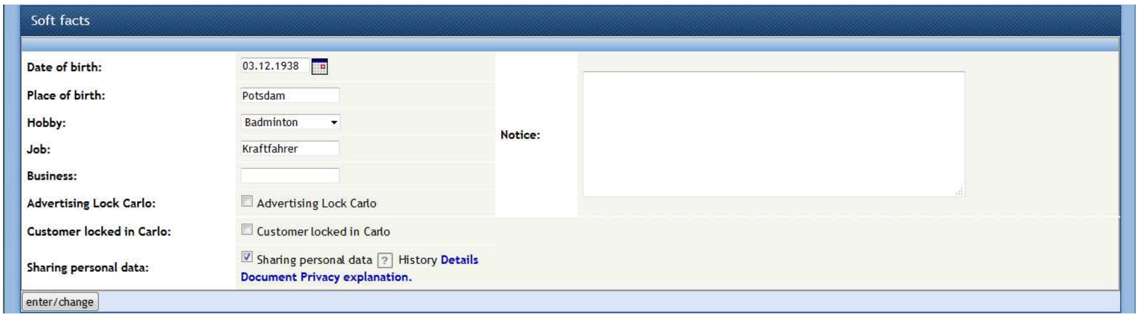


Fig. 6.5: Entry of soft factors

Soft factors can be filled arbitrarily; you may also use the comment field to insert multiline comments. Here, in addition to the advertising block and the customer block, you can enter the data protection consent. If you check the box by *Transfer personal data* or click on the field *Details*, a new window opens where you can enter further data details.

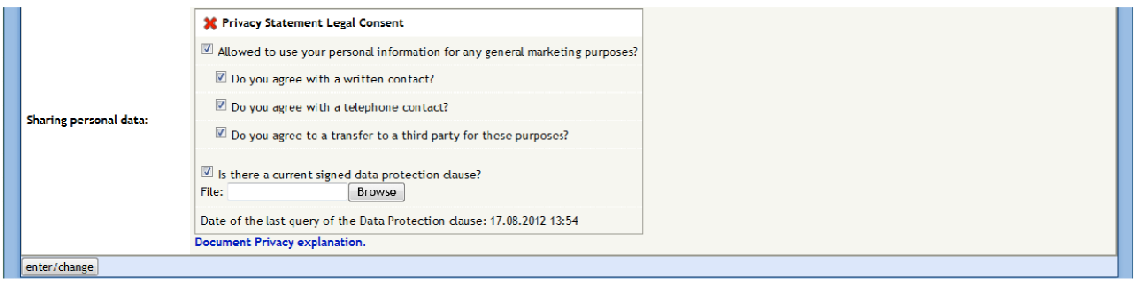


Fig. 6.6: Data protection consent

By default, all boxes are immediately checked although you may individually uncheck any of them. The associated document can be opened and printed at any time using the blue link. If a separate data protection provision is signed, check the relevant box and upload the corresponding document (scanned file).

Save your work by clicking on the button *Enter/Change*.

Depending on installation and configuration, your master data entry form may show additional fields. For example, a link to a business partner may be introduced.

Administrators may delete a CRM record at the end of the page. However, this is only appropriate for new CRM records without connection to a previous system.

6.3 Additional data

When dealing with corporate data records, additional data can be used to manage contact persons. Likewise, when dealing with natural persons or individuals, their relatives may be entered.

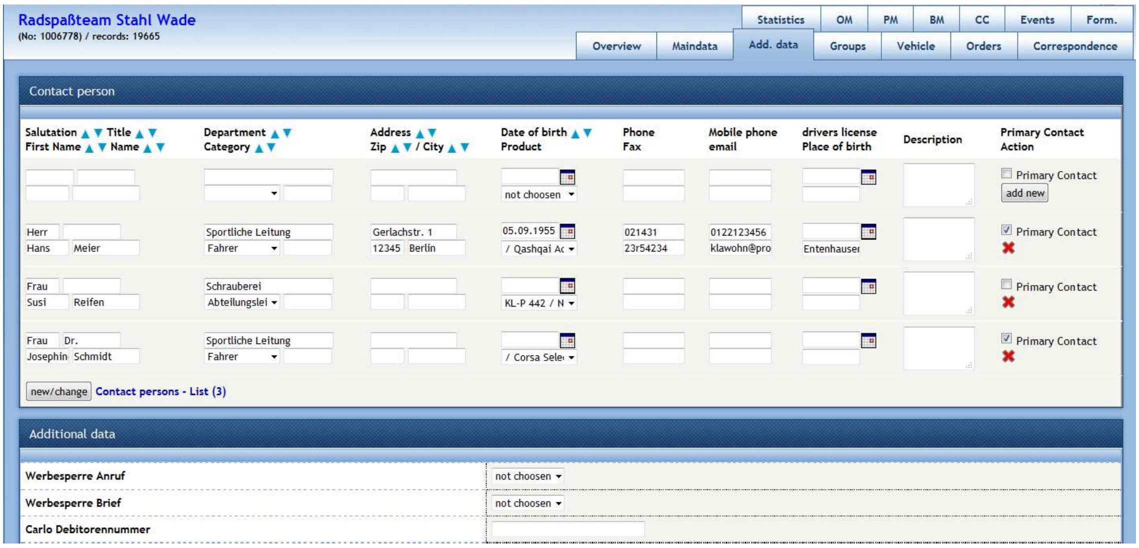


Fig. 6.7 Additional data tab

If a main contact is entered here, you may use it later as a filter -amongst other- during mail-merge. Moreover, the first person selected in alphabetical order can appear as contact person in sale contracts / offers, as well as in the contacts report.

Below, all company-related additional data are displayed. The administrator can enter and change additional data fields under Group management for master data. The display of additional fields depends on the affiliation of the customer to one or more groups.

6.4 Groups

In this tab, you can assign the record to a particular group. For example, *prospects*, *customers*, *employees* etc.

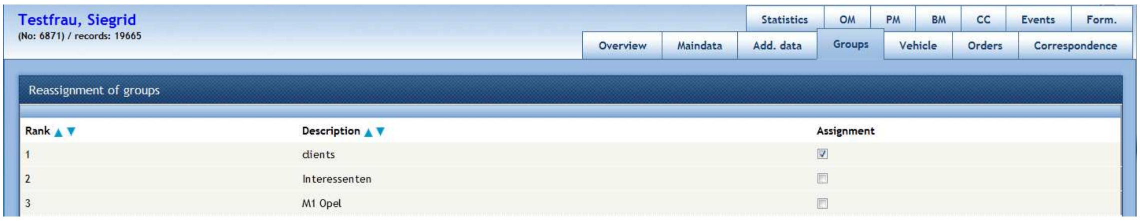


Fig. 6.8: Groups tab

Group assignment changes need to be confirmed with the *Change group assignment* button.

Depending on the group to which the customer is assigned, different additional fields may appear under *Additional data*. This is so because, during the creation of a new group, further data fields can be dynamically inserted which will be valid in the specific group.

6.5 Vehicles

This tab shows a list of all vehicles assigned to the selected customer.

Fig. 6.9: Vehicles tab

Click on the type-model-description to access the detailed vehicle view, where further information on the vehicle is provided. From this view, you can also send an e-mail for the maintenance of vehicle data *(Vehicle on debtor)* and upload vehicle documents.

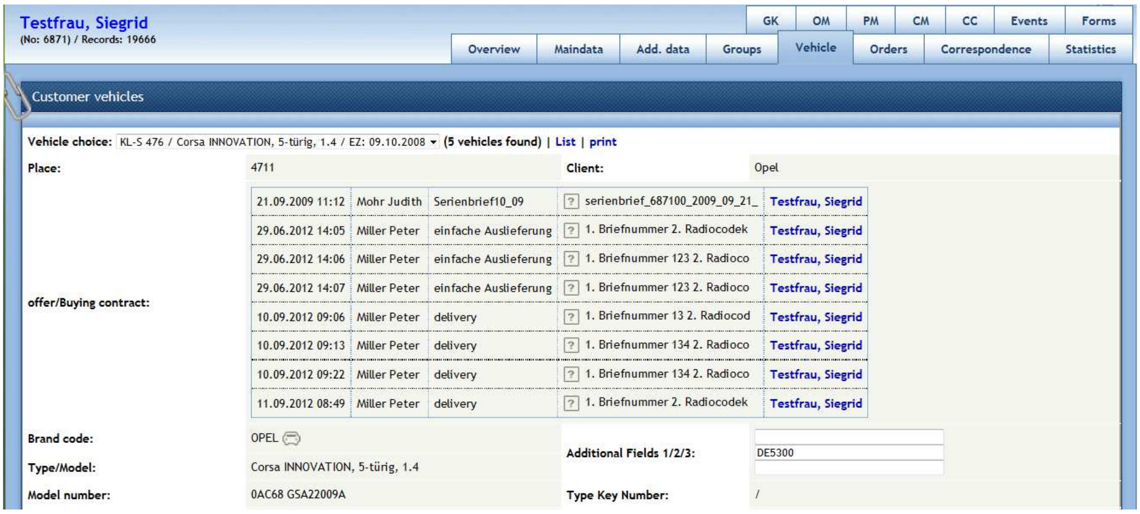


Fig. 6.10: Vehicle detailed view

Any pictures in .jpg format associated with the vehicle card will later appear in the results list of the vehicle search. In addition, these pictures may be printed with the offer / sale contract documents if so desired.

6.6 Orders

This tab displays all orders and invoices for the selected customer. Use a filter (by date, vehicle selection) to select your data of interest and the table header arrows to sort the columns in ascending / descending order as required. Depending on the installation, you will only see the first ten entries available. The remaining entries are available via navigation.

Move your mouse over the invoice field to view the invoice text.

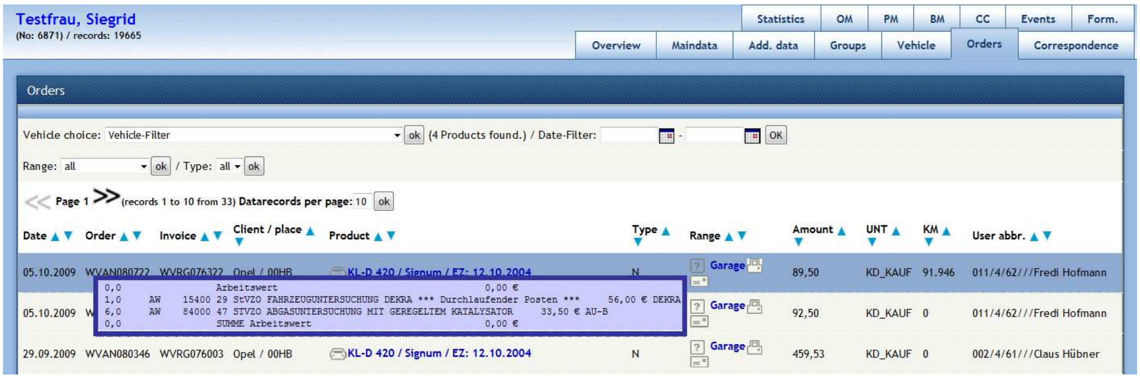


Fig. 6.11: Orders tab

Below the sales table, a customer statistic with ABC values is displayed.

6.7 Correspondence

The correspondence list represents all incoming and outgoing communication processes. These include, for example, all phone calls, e-mails, and letters but also offers and sale contracts.

All existing entries will be displayed in tabular form. Click on the small blue arrows to sort the list in ascending / descending order as required. You may create a filter using a date range. In that case, it is also possible to enter just one field.

The table fields have the following meanings:

Date:

- Correspondence entry time
- Display of end date / time for an appointment in the calendar with a customer reference after the start date
- Default sorting by date, so that the latest entries are shown above
- Special presentation and sorting whereby followed-up items are shown above those not followed-up
- Different additional icons identifying:
  - a contact person (head)
  - an offer / sale contract (two people)
  - a complaint (red exclamation mark)
  - a campaign (phone)

  As you hover over these data, an information window with detailed information opens.

Type: iconic representation of the communication type (the short text for the type is shown as you hover over the type)

- In case a reference to a document is entered, the corresponding icon is shown (two people) Further information is displayed in a small window as you hover over the fields in question.

Category: user-defined or seeded categories for grouping the correspondence entries.

Fig. 6.12: Correspondence list

Done: State of a communications process

- Check: closed process
- Exclamation mark: open transaction; complete the transaction by clicking on the exclamation mark
- Assigning subsequent correspondence is only possible for open processes
- Changing the status to completed / not completed by clicking on the check and exclamation sign icons is only possible for properly authorized users

Incoming / outgoing: Display of incoming / outgoing communication processes

- Right arrow: outgoing correspondence (is automatically set for phone calls, personal conversations, external appointments, fax submissions, e-mail submissions, and mail-merge processes)
- Left arrow: incoming correspondence (is automatically set for incoming calls, received letters, received faxes, appointments, and contracts)

Documents: Open stored documents (identified by their number if several exist)

Subject: Short text describing the correspondence entry (limited to 20 characters; full text shows as mouse passes over field)

Description: Longer, even multi-row text as an extended or further description of the subject (as for the subject, limited to 20 characters; full text shows as mouse passes over field); click on the description to open the full correspondence text will all details for printing

Vehicle: Display of the vehicle related to the correspondence

Organizer: In principle, the user that has entered the communications process in question (the process may be assigned to a different employee, e.g., on vacation or on leave)

Non-administrators can only change their own records within one hour after entry. Click on the cross by the manager's name to delete the entry (in any case, non-administrator users will only have one hour for this operation). If the entry is negative, a red colour appears below the right arrow, which can be changed from negative to positive by clicking on the entry (no more red in the table).

If the entire table cell of an entry appears red, the process is marked as negative (e.g., upon the complaint of an unsatisfied customer).

For related entries (e.g., subsequent process for an existing entry), the process will be shown in a hierarchical fashion. Contrary to regular entries, an arrow appears to its left and table cell shows a coloured background.

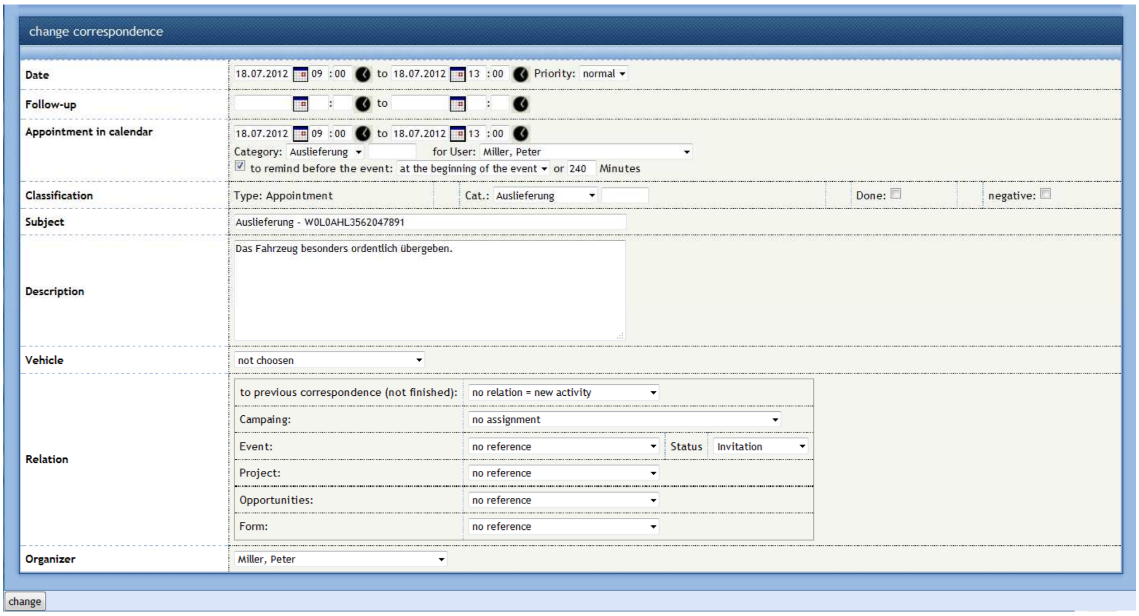


Fig. 6.13: Changing a correspondence entry

Depending on installation, existing entries with a question mark under the table block may be modified. The relevant fields are described below:

Date: Process start and end dates

- the end date is optional; if entered, it will be shown in the list (e.g., for extended appointments)

Priority: Normal (default), high, and urgent

Follow-up: Entries with these option will be shown at the top in the PIM (personal information manager) and in the list as a reminder for the employee to action the associated processes (e.g., if a customer requests a call-back at a certain time)

- optionally, a reminder window opens if activated

Calendar: appointment: it allows the entry of a transaction-related appointment, which appears in the manager’s calendar; you may also set the appointment date and time, the appointment manager (other user possible), and a reminder.

Type: Selection of the communication type (as described in the table above); depending on the selection, additional fields may appear to expand the context of the correspondence entry with extended information

- Incoming and outgoing call: phone number; in case of several customer phone numbers, select the preferred phone number to be used for incoming or outgoing calls
- Document, letter receipt, and contract: input field for a file to be stored after entry; click on the button *Browse* to select a file from your local PC or network drive
- personal conversation and external appointment: Selection of the contact person; if no contact person has been entered in the *Additional data* tab, only the customer will be displayed here (first name and name for private or corporate customers); for external appointments, you may also specify a location, which is determined by default from the first address
- Fax receipt / submission: similarly to incoming / outgoing calls, you may select the preferred fax number and a fax document (e.g., an image) from the local file system
- E-mail submission: you may select the e-mail address from a list (if several exist); you may select the sender's e-mail address, which is that of the current user by default (the second field will be displayed as description for the address in the e-mail program e.g., hans.muster@xyz-gmbh.de: *Hans Muster (XYZ GmbH)*); below you may select the attachments you wish to send with your e-mail (as first attachment, you may add a form letter, which will be

automatically filled with customer fields, and as second and third attachments, local static files)

- Mail-merge: the selection shows all documents available for mail-merge in the CRM system; before document selection, you must select the document group with the left selection field; the completed, customer-related document can be opened afterwards in the table of the existing correspondence entry
- Appointment: Definition of an appointment with date and time
- Task: link to the manager's personal task list
- Notice: marks the notices in the description field
- SMS submission: depending on installation, an SMS can be submitted and its text will appear in the subject line. To that end, the user requires an SMS provider.

Category:	category selection or creation as required (selection field to *New*: and entry of a new category in the contiguous field)
Completed:	if checked, the process is considered closed (further processes cannot reference this entry)
Negative:	if checked, the entry in the table list will appear red
Contact person:	only if a contact person has been entered in the tab Additional data, it will appear for selection here; the reference to a contact person will be indicated with a symbol in the correspondence entry
Subject:	this field should be used to enter a short, expressive text for the process (e.g., call for product information)
Description:	Here, the user can describe the process; multiline entries will be also displayed in the table when moving the mouse over the abbreviated text (less than 20 characters)
Vehicle:	vehicles will be available for selection if previously delivered to customers

Relation:

- to incomplete correspondence: if the transaction is a follow-up transaction of an existing correspondence, this can be specified here; in the list, these related entries will be displayed as a group (e.g., a customer on the phone requests some information that is not immediately available -> the call-back then represents the follow-up transaction for the first call)

- to a campaign: if campaigns were entered in the system, here you can select one; only campaigns valid for the current time period will be displayed
- to an offer / sale contract: if an offer / sale contract is entered for a customer, the contact transaction can reference it
- to a complaint: it can be both the creation of a new complaint transaction (e.g., in conjunction with a telephone call) as well as reference to an existing complaint transaction; complaint details can then be entered in the appropriate tab *(BM)*;

Organizer: as mentioned in the table view, the manager may be selected here (= system user); by default, this is the user logged into the system

By clicking *Enter,* the transaction is created and displayed in the table list. The three most recent entries are also shown in the customer *Overview*. Entries with follow-up appear in the PIM for the respective manager.

Later on, you may run reports by filtering by the field category or subject. Hence, it its useful here to introduce certain rules, so that the entries can be grouped and evaluated (e.g., Subject: Complaint).

6.8 Statistics

In the Statistics tab, the individual customer sales are presented in tabular and graphical form. By default, two graphs are shown: *Sales of new vehicles / used vehicles* and *Vehicle visits*. If it is a corporate client with at least three vehicles, the graphics change to *Workshop-Sales* and *Workshop - visits*. These are represented by quarter. Aggregated key master data and an ABC analysis complete the statistics sheet.

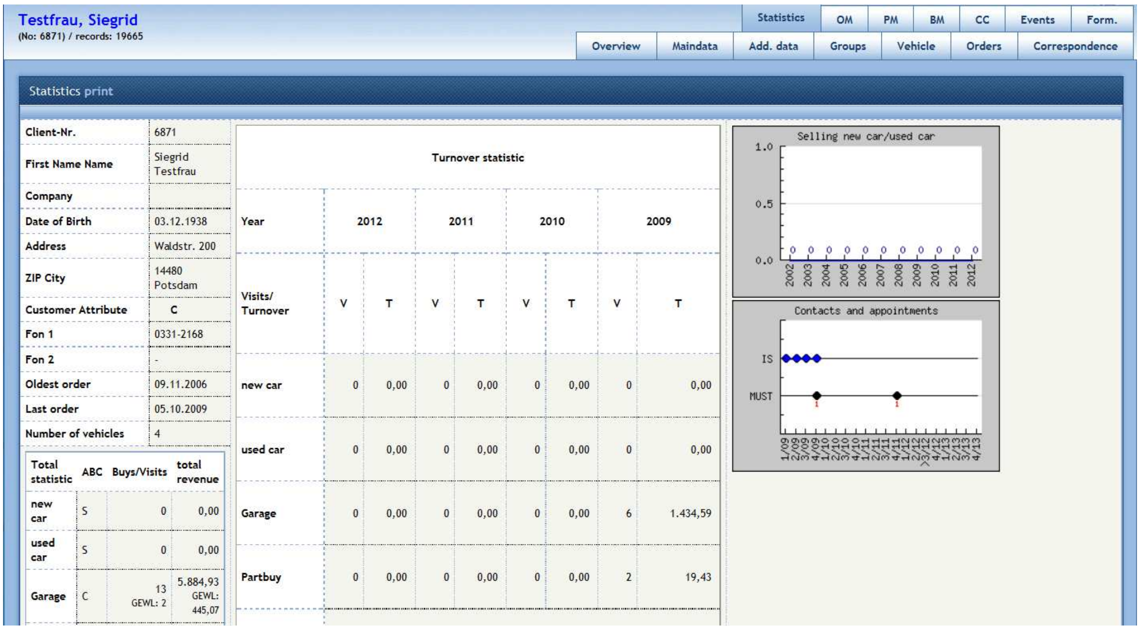


Fig. 6.14: Statistics sheet

6.9 Offer and sale contracts (OM)

All offers and sale contracts made through CRM, both via vehicle search and if necessary, through the Configurator, are displayed in the tab OM. To that end, phase, content of an offer or sale contract, contact source, estimated amount, implementation, and contract conclusion probability must be entered.

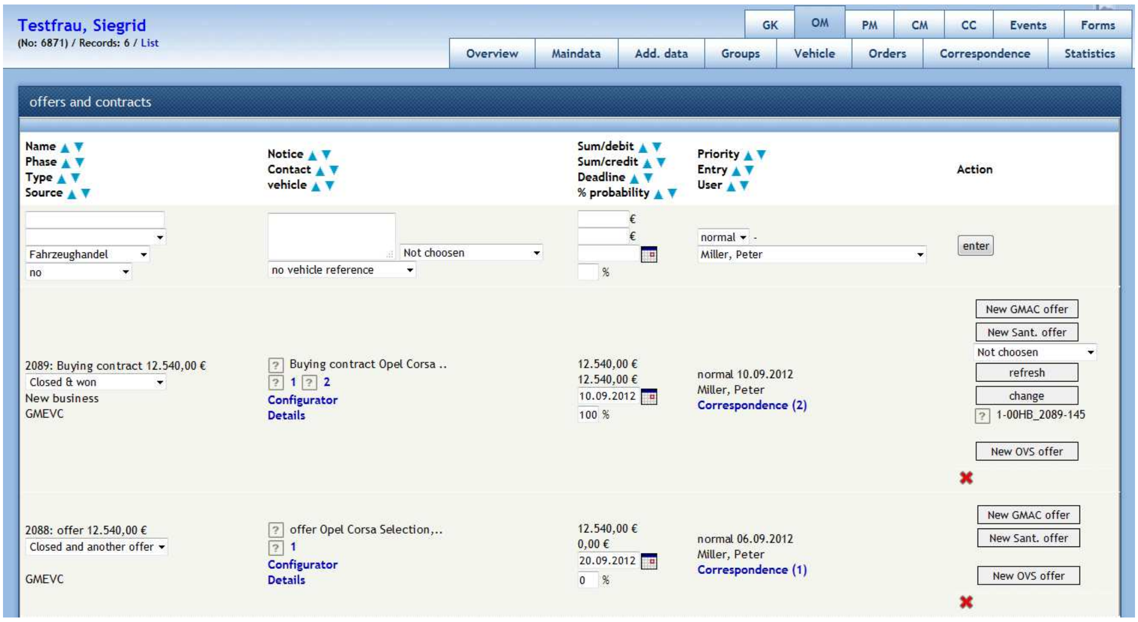


Fig. 6.15: Offers and sale contracts

In the Offer phase, you may directly create further offers or sale contracts from the OM tab or the Customer overview for the corresponding vehicle.

Open offers are also shown in the PIM. There, a colour code indicates whether the offers are still valid or overdue by 14 days (DMS: Carlo). Closed offers and sale contracts are no longer shown in the PIM.

Furthermore, you may also display all correspondence associated with an offer. If you do so, the view changes to the correspondence tab.

6.10 Project management (PM)

In list form, you can manage the projects for the selected data. You may enter various parameters in addition to project name and description. In the column *Info,* you can organize the project staff. Optionally, you may enter a function for them.

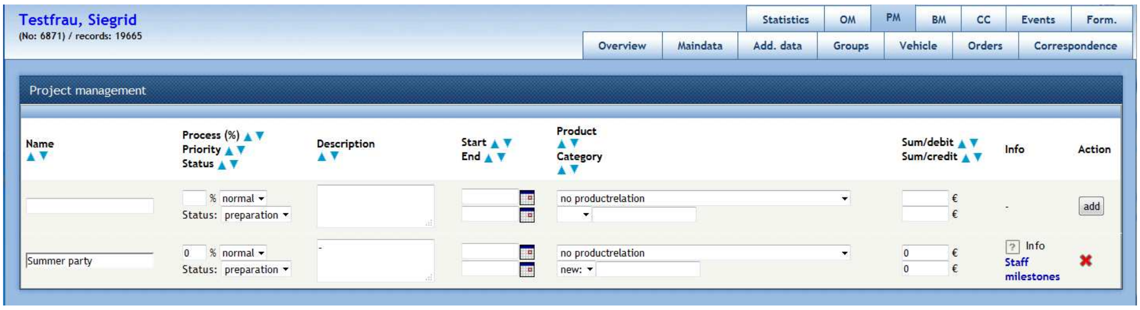


Fig. 6.16: Project

The Personal Information Manager (PIM) shows all projects where the current user participates.

If correspondences were entered for a project, these correspondence entries appear filtered by clicking on the *Correspondence* link in the Info column.

6.10.1 Milestones

After a project is created, click on the *milestones* link under the *Info* column. Besides date ranges, name, and description, you can also enter progress status in percentage, and target / actual costs.

If the fields target / actual costs are filled, the project calculates the total of all milestones in the fields amount / actual amount.

Moreover, the project immediately displays all milestones by moving the mouse over the link *Milestones* (the number of milestones entered appears in parentheses).

6.11 Complaint management (CM)

6.11.1 Complaint entry

Access the complaint entry window by clicking on *Complaints* in the Quick correspondence area of the Master data tab. The window is similar to the correspondence entry creation.

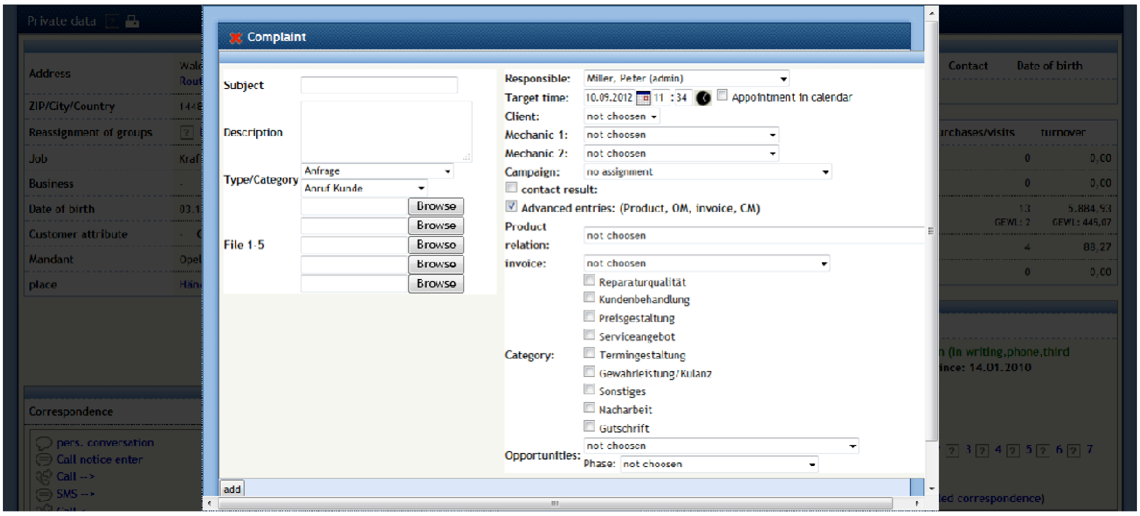


Fig. 6.17: Creating a complaint

The fields Subject and Description must be filled. Additionally, select Type and Category to ensure a better, more accurate reporting. Here, type refers to the complaint reason and category to the complaint form. Both can be defined earlier in the CRM administration.

Up to five Files can be uploaded simultaneously with the complaint in the CRM system.

By default, the logged-in employee is saved as Manager. However, you can make another employee responsible for the complaint. Employees with an email address under user settings will automatically receive an e-mail about the situation. Furthermore, they will be informed by a pop-up window on any new complaints if the option is adequately configured.

If the set Target time is exceeded, the offending complaint will be marked as overdue in the report. The target time is only activated by manually changing the pre-hidden data.

To simplify the assignment of a complaint to a specific workshop employee, the Mechanic window shows all employees assigned to the Mechanic employee group under User administration.

If you check the box Extended input, you may reference a customer vehicle, an invoice, and a sales process.

Checkboxes represent the nature of the complaint and can also be defined in CRM administration. Multiple-choice is available for this point.

Once you click on add, the complaint is saved in the system and automatically assigned its own open complaint number. In the Overview area of the tab Additional Information, open complaints are shown in red and completed ones in green.

6.11.2 Processing complaints

In the tab BM, existing complaints can be reviewed, changed according to rights and responsibilities, or deleted using the red X. Moreover, it is possible to print documentation on the complaint process or create a file by clicking on the link *Sheet*. The underlying document may be adapted by the Company itself. It can be found on the CRM server under Drive:\CarloCRM\Apache2\htdocs\templates crm \.

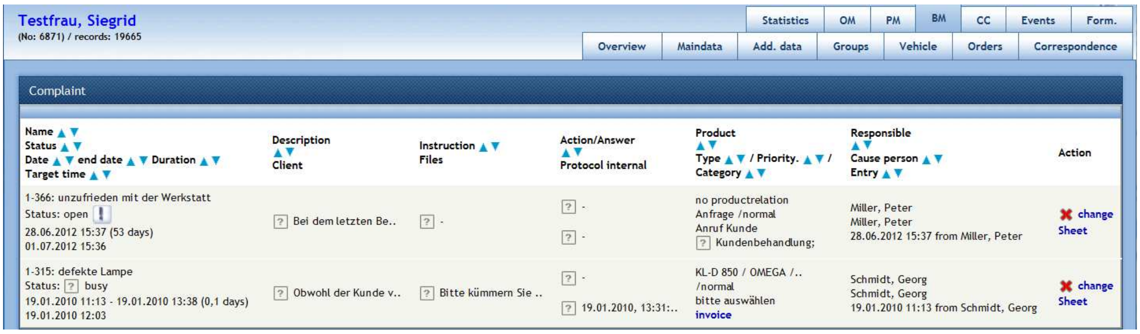


Fig. 6.18: Tab Complaint management

The tab Complaint management lists all customer complaints. In the *Action* column, the responsible employee or the administrator can click on the *Change* link to open the complaint processing window.

By default, newly created complaints have the status *Open*. As soon as complaint is modified, it is recommended to change its status (e.g. *assigned, in process, closed*) depending on the situation.

The creation date and complaint time are automatically filled. These values are relevant for complaint reporting. If a target time is specified, this must be manually changed here.

If the complaint is forwarded to a different employee, the responsibility changes, or somebody needs to be informed of its creation, the field *Instructions* may be used as required to provide the necessary comments.

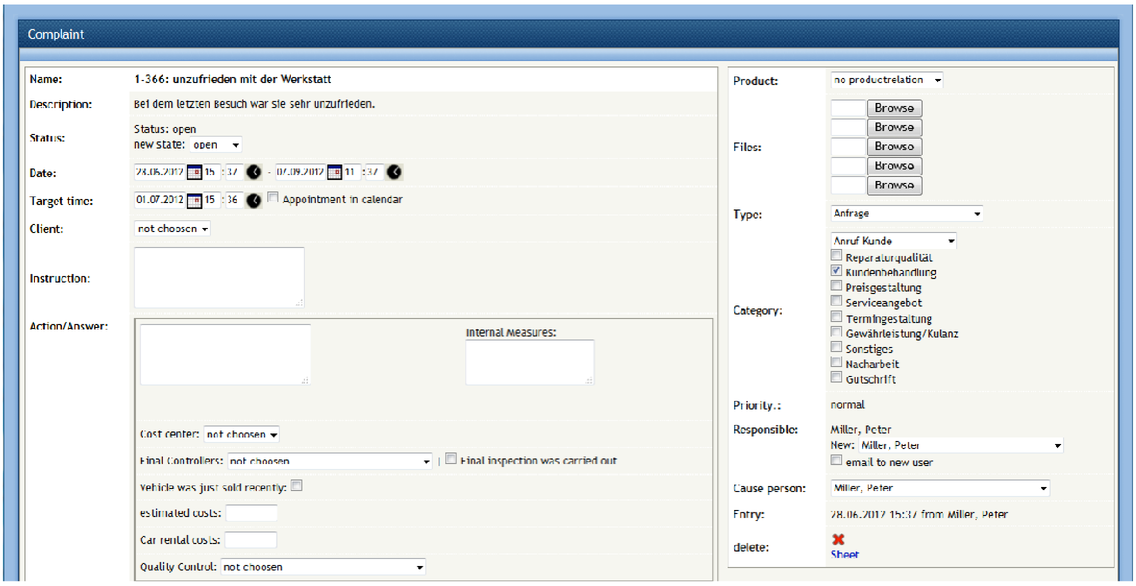


Fig. 6.19: Processing a complaint

Activities performed on a complaint will be entered in the *Action/Reply* field and stored in the corresponding action log with their date, time stamp, and user name.

In this area, you may select different statuses (e.g., final acceptance) that were previously entered by the Administrator. Click on the name to open the correspondence window, which can be filled with relevant information.

The vehicle reference appears to the right of the screen page, where it can be modified. Right below, you will find any files uploaded alongside the complaint. These can be extended with further documents. Existing documents will be overwritten if the user select an existing link and adds a new document in its place.

If the user changes the person responsible for a complaint, this may be informed via e-mail (check in *E-mail on new MA*) provided the corresponding address is stored in CRM.

If customers are provided with an e-mail address, they can be automatically informed of any changes to their complaints.

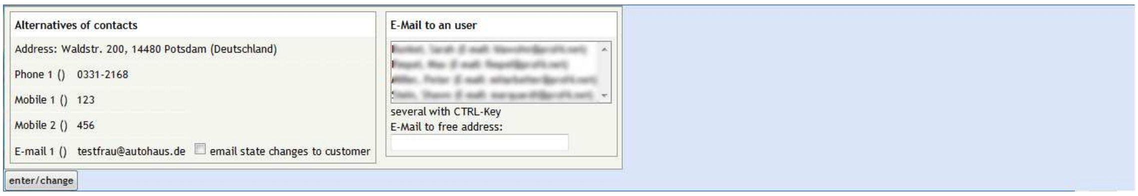


Fig. 6.20: Complaint creation - E-mail notification

The field *E-mail to user* is used to inform other users with an e-mail address in CRM of the complaint status. Please note that you may select several users with Ctrl+Click.

To save your entries, press *enter/change* as you complete your task.

6.11.3 Complaints overview

The following information is available in the tab BM:

- The status information window displays status changes with time and responsible user.
- You can click on the status exclamation mark to close a complaint.
- As you hover over the complaint field, the description text is displayed.
- All instructions can be seen in the corresponding information window.
- The action process is shown complete with date / hour, correspondence creator, and text.

6.12 Call center (CC)

If the Call center module is enabled, a list with all call scripts is displayed. The *Status* indicates whether the customer was called back for the corresponding script and provided with an answer for his/her question. Click on the link *Action/Call* report to retrieve the questions and enter possible answers.

Fig. 6.21: Call center tab

Answered questions will appear sorted by date. Click on the date to view the corresponding answer.

The layout of this tab is similar to that of the Overview tab. This tab shows all valid call scripts. Click on any of them open and enter the appropriate answers.

6.13 Events

Customers that were assigned a previously created event will show status information in the tab *Events*.

Fig. 6.22: Event status

The event status can be changed in this tab but also in the correspondence tab connected to a contact process. There, the desired event status will be selected.

6.14 Form

If forms are defined (under *Management / Forms*), these can be entered and saved for a particular record. Several documents of the same type may be stored. Contact persons may be selected if available. As you select an existing form and click on *Enter*, the form clears and opens for entry.

Fig. 6.23: Forms

Created forms may be opened by clicking on the *Show* link.

All forms entered for a particular customer can be viewed and retrieved from the Overview tab.

7 Record filtering

Users utilize filters to breakdown a number of records into manageable sets using a set of conditions. For example, customers may be filtered by vehicle, region, and marketing action.

Moreover, filter results may be further processed with any of the actions available in the list view (next chapter).

7.1 Filter wizard

As you invoke the filter wizard in the menu Management / *Filter* wizard, a 3-section form opens.

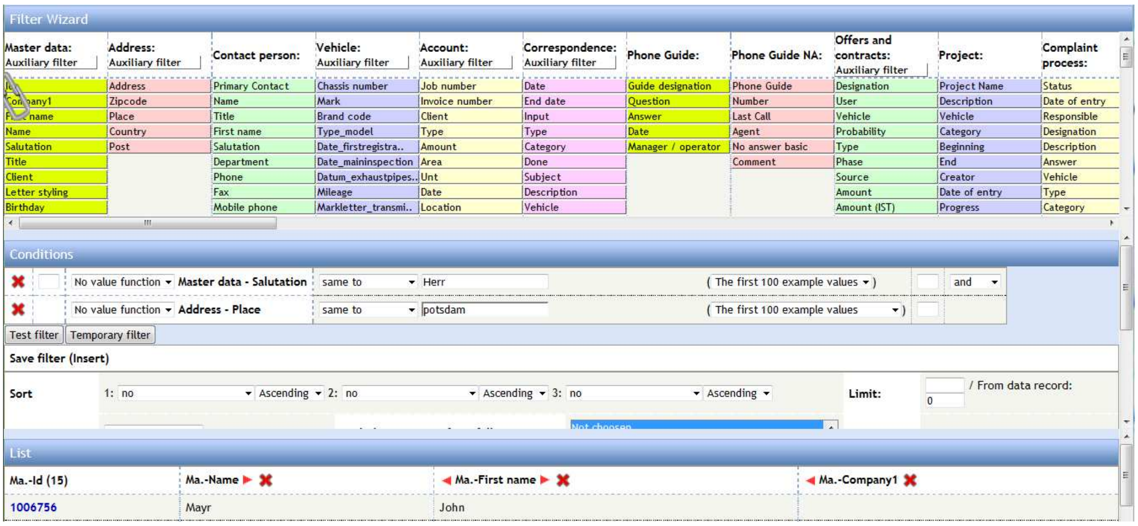


Fig. 7.1: Filter wizard

a) Field selection (top section)

Here, all CRM fields are displayed in groups. Use Drag & Drop to move a field into the middle section to create a new condition, or into the lower section to extend the columns in the results list. To that end, click and hold on the field you wish to move. Move the field to the desired area, and drop it by releasing the mouse button.

Please note that your rights may restrict the number of selectable fields. Rights are defined by the Administrator under Users rights or Parameters.

b) Conditions (middle section)

As a field is moved into this section, a new row is added. This represents a condition to restrict filtering results.

Fig. 7.2: Conditions

Use the red X to delete a condition.

Open bracket: if several conditions exist, the bracket can be manually set (important for conditions connected with logical OR)

Value function: groups data from the selected field table and performs a mathematical operation:

- Total (only for numeric fields): sums the field values
- Average (only for numeric / data fields): calculates the average value
- Minimum: displays the minimum value
- Maximum: displays the maximum value
- Count: counts the number of records

If you select a value function, the corresponding condition will be separately arranged under the regular conditions, as these cannot be combined with value function conditions.

If a value function is selected, the grouping value, e.g., Sum, will be automatically inserted as a new column (e.g., Sum of *Field name*) in the results list (lower section).

Field name: displays the selected field name (in the form "Table-Field")

Operator:

c) equal: absolute equality

d) non-equal: displays values not meeting the criteria

e) similar: enables a wildcard-based search (* as a placeholder for any number of characters and ? for exactly one character); case is ignored) in character chains (words);

- non-similar: negation of the above

- larger/larger, equal/smaller, smaller/equal: filtering based on comparisons with entered values
- contains: enables the entry of several, comma-separated values
- between: the filtered value must fall within a specified start and end value range

Input field (for *between* two fields): the filter values are entered here; for character chains (words), * and ? can be used as placeholders; for dates, the correct format (dd/mm/yyyy) must be specified.

first 100 values: depending on the field selection, the first 100 values in the database will be shown; if the user clicks on one of them, this will automatically pass to the input field.

Function: Entry of a number instead of a date

- Day: all entries for the day specified, regardless of month and year
- Month: all entries for the month specified, regardless of day and year
- Year: all entries for the year specified, regardless of day and month
- Day difference / Month difference: the current date is taken by default, i.e., the filter can deliver different results depending on the execution time.
- Day difference without year: refers to the date fields Day and Month alone
- Day = today: Refers to the date field Day alone
- Month = today: Refers to the date field Month alone

Close bracket: if several conditions exist, the bracket can be manually set (important for conditions connected with logical OR)

Logical operator: and/or/and not/or not - defines the logical combination of conditions; in case of several *ORed* conditions, brackets are necessary.

c) Results list (lower section)

Here are displayed all fields that should be later set as column headers in the list view. By default, master data ID, first name and Company name are selected. Users may change their configuration in *Personal settings* as desired.

Fig. 7.3: List view

If several fields from the field selection of the top section are moved to this section, they are appended at the end. Use the red arrangement arrows to move fields right or left as appropriate.

If conditions and column selections have been defined, the filter can be tested (button *Test filter* in the middle section). As you do so, the results list in the lower section is loaded. Do not forget to refresh the results if you add or change the conditions or filters in the list.

Only the first 20 records are shown. In any case, the total number of records returned is shown between brackets in the first column heading.

As an example, the default behaviour of a correspondence filter will only show those customers with correspondence entries meeting the filter conditions. In case a correspondence field (e.g., subject) is added to the column selection whereas no condition is set in the correspondence table, an additional option opens - *Key field: select also records without values in table*, and the correspondence table stands available for selection. If checked, the filter will show not only customers with correspondence entries but also those without any entries in the correspondence table; for these, the list column appears blank.

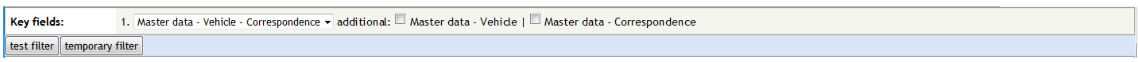


Fig. 7.4: Index fields

In case several table fields from different tables are selected as conditions or column selections -which may lead to additional indexes -, a selection appears next to the index field to indicate how this could be constructed. The default value proves appropriate most of the times. For example, if values from the tables Vehicles and Orders are selected, the following default index is not possible:

- Master data - Vehicle
- Master data - Order

Instead, the index should include a product reference, as this is available in the Order table. Accordingly, it is possible to use the following combinations:

- all sales for a customer and his vehicle data = *Master data – Order - Vehicle* or

- all vehicles for a customer and his sales = *Master data - Vehicle – Order*

In the second case, there are no Customer (Master data) - Order indexes, i.e., it might well be that a vehicle belonged to a different customer before and an old sales record was booked which does not however belong to the current customer. Regardless, the sales record will still be shown, as it is indexed by the vehicle.

To avoid this situation, it is possible to check an additional index after the index selection. Alternatively, if you wish to exclude old sales records, you may select the *Master data - Order* index to ensure that only sales records belonging to the current customer are selected.

You may update the table in the middle section at any time by clicking on the *Test Filter* button.

If the *Test Filter* buttons returns the desired results, you can save the filter or transfer it to a temporary filter.

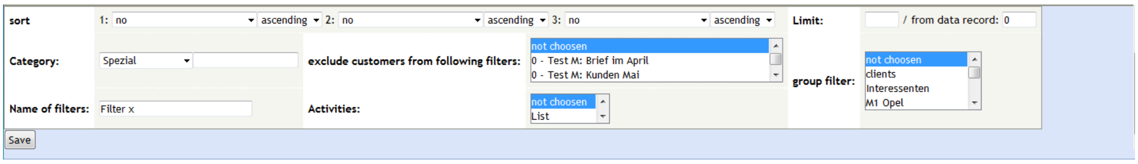


Fig. 7.5: Saving filters

- **Temporary filters:** the selection will only be transferred to the list view on temporary-basis. There, you may still review all filtered records and execute any desired actions including File export.

  If you wish to further modify your filter, this is still available in the menu item *Administration / Filter wizard*, as its conditions and field selections are stored in a temporary area.

- **Saving:** before saving, you must assign a descriptive name to the filter for easy retrieval. You can select up to three sorting fields. Later on, you may define additional sorting criteria in the list view. Furthermore, you should provide a filter category. Depending on installation, employees define their own categories for filters only available to them. Now, should another employee require access to your filter, you should select a category that has been assigned the corresponding rights for several users. Alternatively, you may enter a new category. By default, this may only be accessed by the user.

If filter results exclusively relate to a given customer group, the data set will be automatically restricted to this customer group after saving through the selection of group filters.

After saving, you may access directly the filter results in the list view. As you call the Filter wizard again, you may define new conditions that will overwrite the old ones. Existing filters can be modified at any time.

7.2 Exclusion filters vs. Help filters

There are two options available to massively exclude records from filter results.

7.2.1 Exclusion filter

Exclusion filters are used to remove customer records from filter results,

To that end, you will to first create and save your exclusion filter. Secondly, you create the main filter and exclude the first filter data. Finally, as you save by clicking on "Temporary filter" or "Save", the exclusion filter no longer appears in the filter results.

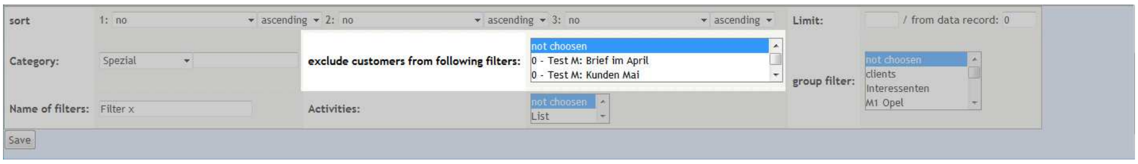


Fig. 7.6: Exclusion filter

7.2.2 Help filter

Unlike exclusion filters, which are designed to exclude entire customer records, help filters are intended to exclude or include specific results (e.g., invoices). To that end, use the menu item *Management / Auxiliary filter* and *Saved auxiliary filter*.

First, you must create and save your help filter.

Use the dropdown field *Records from table* to determine which data table must be considered (e.g., invoices, vehicles).

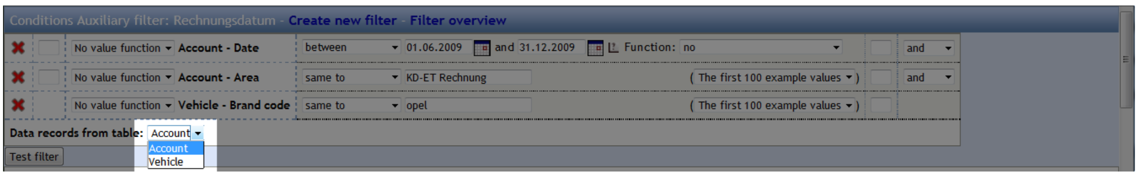


Fig. 7.7: Auxiliary filter 1

All stored help filters can be found, changed, copied and deleted under *Saved auxiliary filter*.

In the next step, you create a main filter or extend an existing one. Use drag and drop to move the help filter fields to the corresponding column in the conditions section, select the desired one, and decide whether the filter data must be included or excluded ("include / exclude").

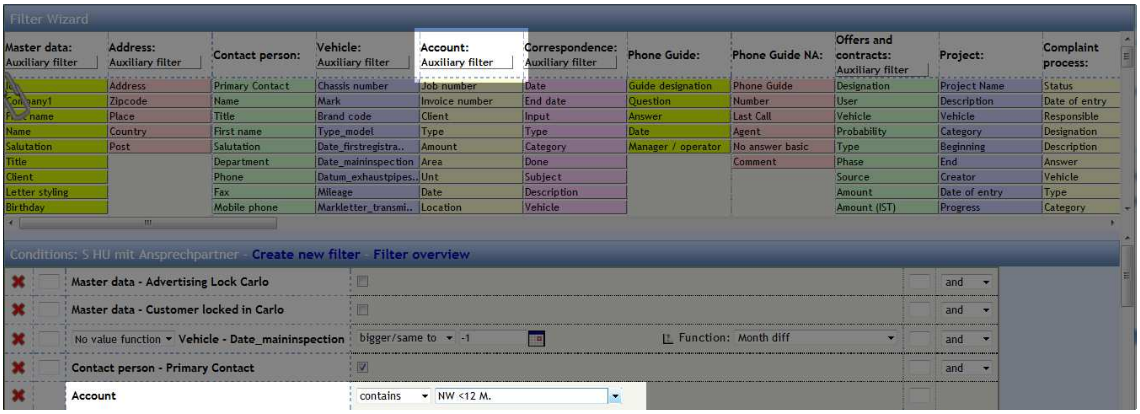


Fig. 7.8: Help filter 2

As you click on *Test filter*, *Temporary filter* or save the main filter, the correct filter results are shown.

7.3 Displaying filter results

If the filter was saved, it will appear in the selection list of the search box between the search field and the group filter selection.

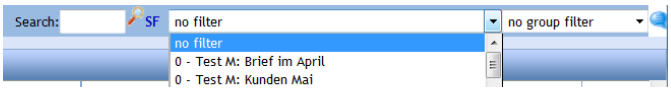


Fig. 7.9: Filter selection

The list view is called as you select the corresponding filter. Initially, a search-field search will only search within the filter results. If no filter is selected, however, all records are displayed in the filter search results.

Even if an individual customer view is called, only customers included in the results data appear. The number of records meeting the filter conditions is shown under the record name in the individual view. Next to it, you can see a link to the filter list. Click on *List* to access the list view. Similarly, the list can be accessed by clicking on the link set to the right of the navigation arrows.

7.4 Filter management

Properly authorized users can view and modify all their filters under the menu item *Management / Filter management*.

Fig. 7.10: Filter administration

By default, the filter list is presented in descending order by date. Sorting can be changed by clicking on the sorting arrows.

The filter overview lists the conditions for each filter. Click on *Filter name* if you wish to access the list view for these filters. *Creation date*, *User (created by)* and *Category* follow to the right. You may limit the information displayed using the *Filter category* field.

Click on *Change* if you wish to modify a filter. The filter wizard will open showing the corresponding conditions. You may change the filter name but also its logical comparison operators, conditions, and bracket arrangement. Only if you click on *Save new filter* will your changes become effective. Also, the new filters will appear on the list view.

In case the filter is selected in the menu line, it must be re-selected for the new conditions to take effect and thereby refresh the selection.

You can copy filters in the filter list. Copied filters are named as their source but with the word *Copy* at the end. Click on the red cross to remove a filter from the system. Please note that the customers found using this filter remain in the system.

8 List view

Next to the data record view, which shows information for a particular customer, you can also access the list view after filter selection. Here, users can select further tabs designed to help them launch marketing actions including:

- mail-merges,
- E-mailings,
- follow-up campaigns,
- export functions.

(depending on authorization and installation options).

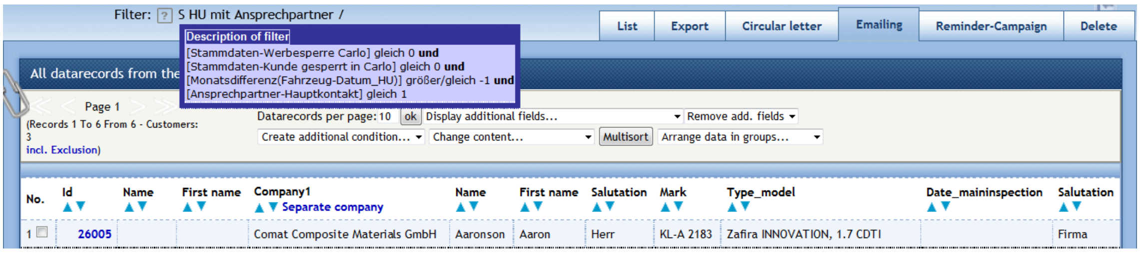


Fig. 8.1: Header of filter results

By default, the tab *List* is selected. The name of the selected filter appears to the right of the tab. Hover your mouse over the information window to view the conditions stored therein.

All tabs (except for *Export*) provide selection fields next to the navigation options. You can add further fields to the view, which will be appended to the end of the table header.

Furthermore, you may insert additional field conditions, which will be presented in the list view. After selecting the filtering field, a new window opens to enter the corresponding conditions. Active conditions appear in the column header, from which they can be removed if so desired. Alternatively, you may review all additional conditions in the list shown next to the selection field. Select the one you wish to delete and proceed. Conditions remain active until a new filter is selected.

If so authorized, users may change the field content of the active customer list. This can be done by selecting the field to the right of the conditions selection field. Changes to the field content are valid for all customers appearing on the list. You may restrict the data to be changed to the selected customer by checking the box (set the box in the first table column).

In addition, you can sort data by up to four fields. Sorting is recognized not only through the individual arrows in the table heading, but also through the lamp symbol set to the right of the multiple-sorting button. To cancel multiple-sorting, simply click on the regular sorting arrows -whether ascending or descending- on the column heading.

The grouped display can show list data grouped and sorted by a given field. For example, if you select *Address - Location* as your grouping field, customers appear grouped by location, i.e., customers for location 1, customers for location 2, and so on and so forth. The field must be available in the list and further fields can be selected by clicking on *Show additional fields*. If grouping is enabled, an additional header row for each grouped field content -in this case location- appears with the customer count for this location. Furthermore, each column will display an information text as you pass over it. Depending on the column type, totals are calculated and the minimum and maximum values displayed. Moreover, field content occurrences are shown in a table inside the grouping.

The grouping can be selected with the first selection entry. On the other hand, you may skip grouping and simply calculate and display totals for the filtered data. To do so, select *Only calculate totals*.

8.1 List

The row under the tab header displays the page selected in the results data. In principle, ten data records are displayed. This value can be changed by adjusting the personal user settings. On both sides of the page number, you will find navigation arrows to move up and down in the results list. Likewise, you may jump directly to the list start and end records (double-arrow).

In case a sorting field is selected, the list will be shown accordingly sorted. Afterwards, you may use the small arrows on the table header to sort data by any field.

You can select one record per checkbox in the first list column. In doing so, you assign the selected customers to a new or existing group, whereby the group affiliation is extended. Existing group assignments are not changed but new ones added.

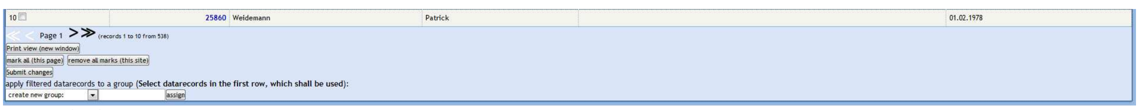


Fig. 8.2: List view

You may select / de-select multiple records simultaneously in the current page by clicking on *Select all* and *Deselect all*. Any additional customers in subsequent pages will not be affected. The selection change must also be accepted. This can be accomplished with the same buttons or via page navigation.

The newly-assigned customer count will be shown after clicking on *Assign*.

Moreover, you can insert certain customers in an exclusion list if a user-defined filter is enabled. The assignment to an exclusion list will be saved with the filter, i.e., as the filter is later invoked, the checkbox in the first column for these records appears marked and the rows show in red. Excluded customers will not be considered during mail-merge and E-mailing processes. Furthermore, these will be ignored by the Call center module.

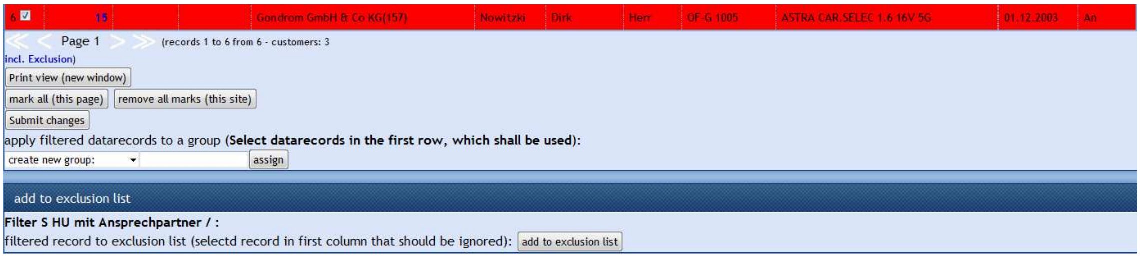


Fig. 8.3: Exclusion list

Exclusions may be of temporary nature. To that end, mark the checkbox for the corresponding customer and click on *Accept selection*. Until the customer logs out, the customer will remain selected in the list view and will be thus ignored by mail-merge or similar processes.

Depending on installation and configuration, all customers in the list view filter may be displayed with a link to Google Maps.

8.2 Export

Open the tab *Export* to export your filter results. After selecting the target format, the following options are available:

Send E-mail: the file will be sent directly to the saved address upon creation.

Run macro: a previously entered action will be combined with the list record.

Correspondence entry: a correspondence entry with the items stored here will be created for each customer in the file

Export save settings: settings will be available for further exports and may be changed as necessary.

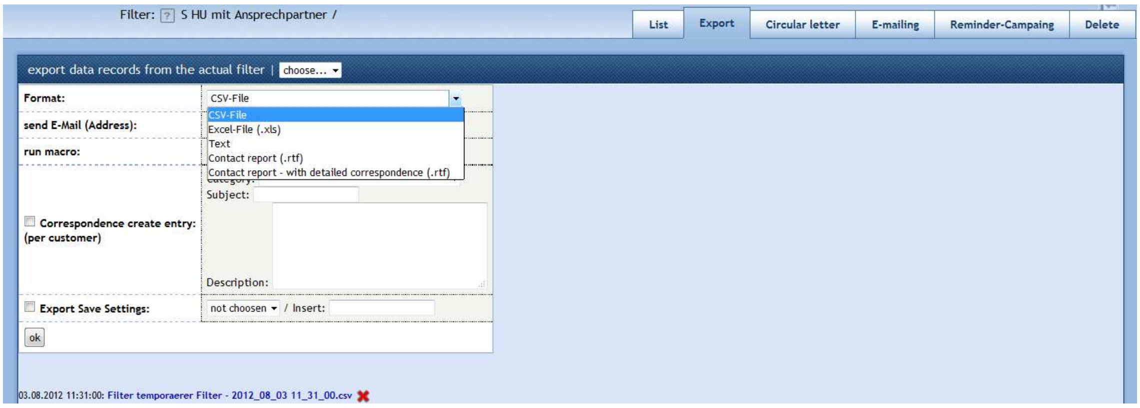


Fig. 8.4: Export with target format selection

In addition to CSV and Excel, you may create a Contact report as a Word file holding miscellaneous customer data. This report is configurable and may be adjusted by field sales staff as necessary.

A list of all exported files is shown below this window. Please note that these may only be seen by their actual users.

8.3 Circular letter

Once a document is centrally stored in CRM as a mail-merge document -as described in chapter *Document administration* -, it may be used as a template. In doing so, all mail-merge fields defined are filled with customer data and an entry added for each customer in the correspondence list. During printing, the document created contains all pages of a personalized letter for the recipient customer.

The mail-merge records list will be paged similarly to the list view. In the first column, a checkbox is provided to exclude any records which should not be considered during the mail-merge process (e.g., records with missing or incomplete address information). Therefore, this checkbox functions as the exact opposite of the one in the *List* tab (whereby all selected records where assigned to a given group).

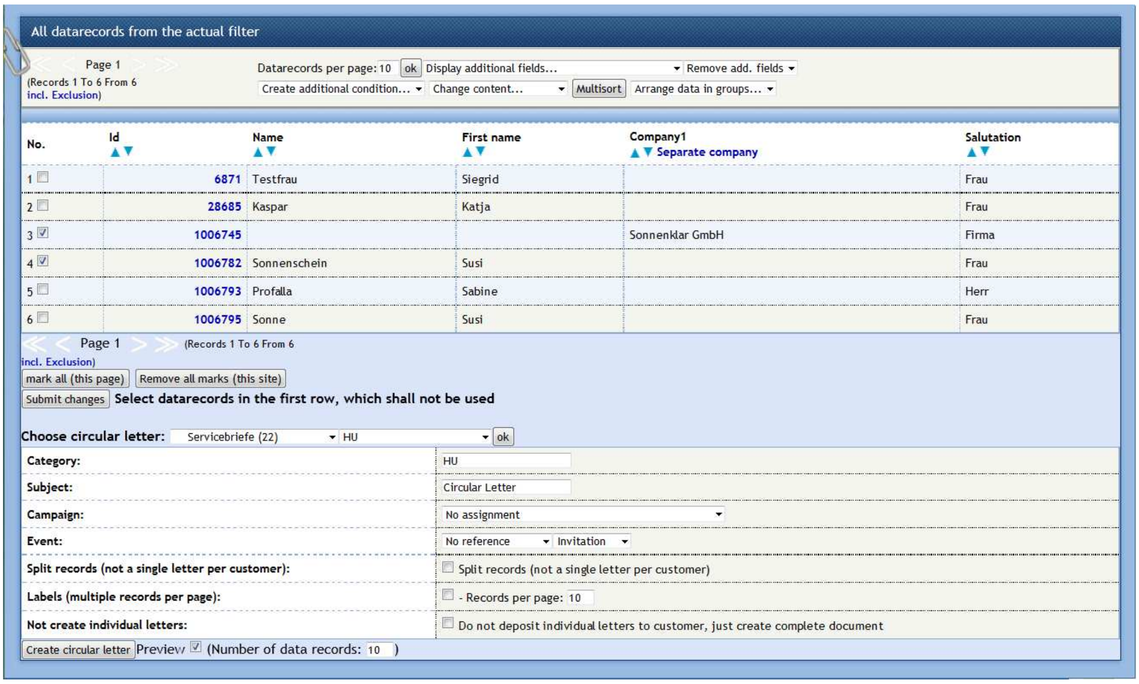


Fig. 8.5: Circular letter

After selecting the excluded customers, the document to be used as mail-merge template is selected in the selection field. The document group selection shows all documents in this group in the second selection field.

A new correspondence entry is automatically created for each customer. To that end, the *Category* and *Subject* criteria may be adjusted. In case no correspondence document should be created by customer, check the box *Do not create individual letters*.

The *Campaign* selection serves for further filtering and assigns the individual customer letter processes to the selected campaign.

You may also introduce a reference to an *Event*. If the status is appropriately selected, a new entry is added to the customer's Event tab. Likewise, the event reference may also be assigned to an invitation letter.

The *Labels* selection is used to fit several customers in a single page. The number of created records per page is user-configurable (10 by default).

Letters may be created not only by customer but also by filtered invoice of vehicle. Thus, a customer may be contacted several times if necessary.

Click on *Preview* for a document preview. Verify as required and then confirm creation.

Click on the *Create circular letter* button to create a personalized mail-merge process. This process may take some time depending on the number of records involved. Click on the *Mail-merge link* to open the associated file. The result is a RFT file, which can be opened by most word processing programs. The letters appear sequentially by page so that they can be printed in one go.

The created document appears in the corresponding customer correspondence list.

If the filter with contact person fields is enabled, a separate document is created for each contact person.

Created mail-merge documents can be accessed under the menu item *Management / Created circular letters*.

8.4 E-mailing

As we have seen with the mail-merge process, you may address all customers in a personalized fashion via an e-mailing campaign. Under the list, you can specify various parameters for e-mail submission. Moreover, you may attach documents managed in CRM and local files. As for mail-merge, a new entry is added to the customer's correspondence list.

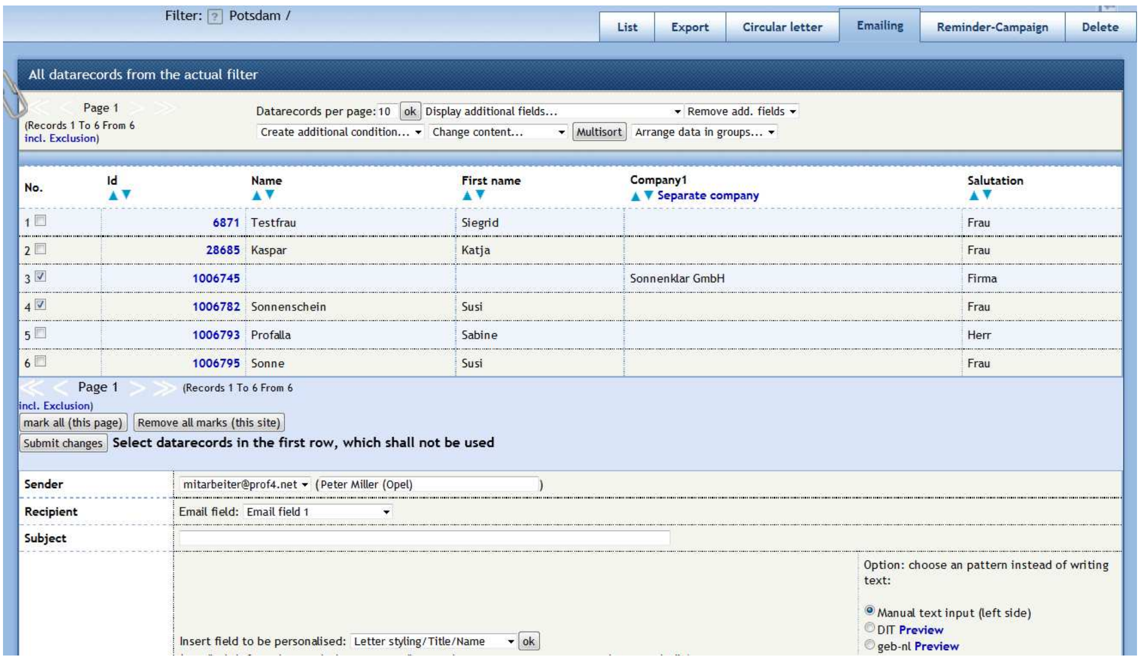


Fig. 8.6: Mass-mailing with personalized text

To create a personalized mass mail, you may select the individual fields from the selection menu in square brackets. These will be inserted in the mail afterwards.

Check the *HTML mail* box to send HTML mails. Otherwise, only normal, text e-mails will be submitted.

If the *Read confirmation* box is checked, a confirmation e-mail will be sent to the e-mail address specified as soon as the message is read by its recipient. To that end, recipients should also have this function enabled.

In the upper area, you can select the e-mail addresses of the contact where the e-mail should be sent. Moreover, you can indicate an address combination, e.g., to the 1st, 2nd, and 3rd address.

If templates have been defined under *Administration / E-mail template*, you can select and use them here instead of entering the corresponding text. E-mail templates can also include embedded images.

As for mail-merge, you may introduce a reference to an event. As you do so, an entry is automatically added to the events tab for each customer on the list.

Moreover, if you reference a campaign, each entry will have this reference.

Use the preview function to verify the e-mail correctness before its final submission.

After submission, the status of the submitted e-mails can be viewed in a separate menu item *(Administration / E-mailing status)*. Here, you may resend any unsent e-mails.

8.5 Follow-up campaigns

These campaigns create user follow-up actions, which will then appear in their PIMs for processing. These actions are characterized as open / to be completed tasks.

A follow-up is generated for each customer in the filter results unless its first column box is checked or it belongs to the exclusion list (see tab List).

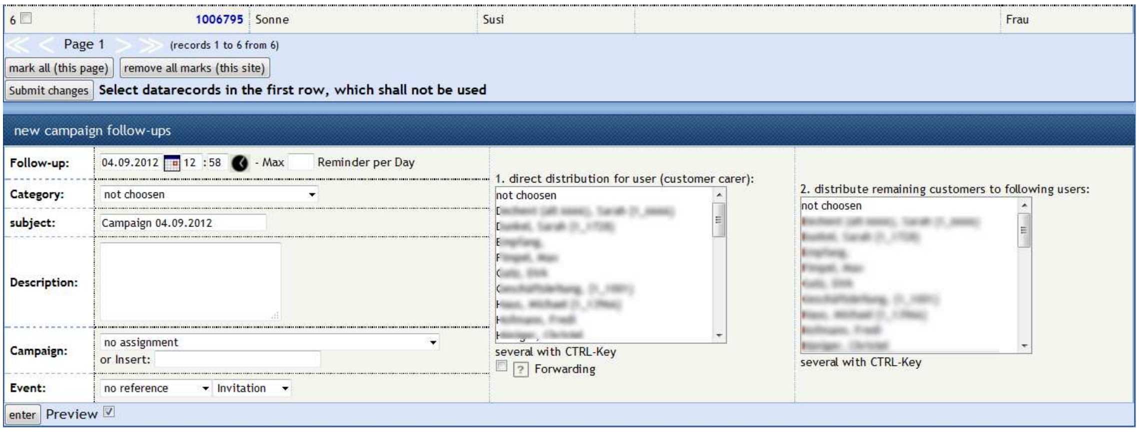


Fig. 8.7: Campaign follow-up distribution

The follow-up is a correspondence entry whose follow-up date must be specified. In addition to the selection of category, subject, and description, you may also assign an event and a campaign to a correspondence entry. A new campaign can be created so that its validity period equals the current date. This, however, can be later changed under Campaign administration. Campaign assignment simplifies subsequent process reporting, e.g., campaign reporting.

Next to the correspondence parameters, you may find two input fields with CRM users.

1. direct customer assignment to the following users (customer manager):

Here you can select the user defined as the customer manager, i.e., this customer is assigned the follow-up action for his/her own customers.

2. remaining customers split evenly to the following users:

All customers, whose manager was not assigned in step 1 above, will be split evenly to the selected users.

If a forward action was entered under Administration / Macros filter, this will be considered here so that all occurring follow-ups from of the selected users will be transferred to others.

The *Preview* box is checked by default to ensure that the follow-up entry assignment is verified. The number of customer follow-ups per user is listed in a table.

After execution, click on the button *Enter* to create the correspondence entries.

All created follow-ups can be displayed and deleted under the menu item *Administration / WVL Campaigns*, analogously to mail-merge and e-mailing processes. The number or records assigned is shown in the *Details* column.

8.6 Deleting

After filtering the customers to be deleted, click on the button *Delete marked records* to delete the customers with all associated data. The selection is done on a page-by-page basis.

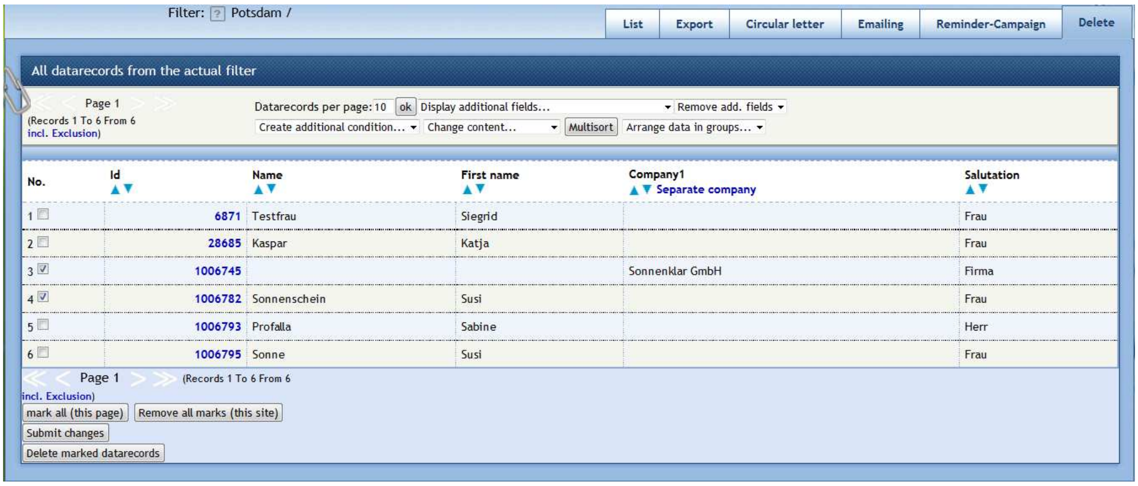


Fig. 8.8: Delete tab

In case a group filter and no regular filter are selected, the affiliation of the record to this group can be deleted without deleting the record itself.

Please note that customers in the old system may need to be removed as well.

9 PIM functions

PIM stands for Personal Information Manager and shows various key data and dates for the current user. In principle, users can directly organize their PIMs under *User / Personal settings*.

9.1 Follow-up

The upper list shows all open transactions from the customer correspondence / communications list, which the current users must still process. This includes

- all tasks that the current user has directly identified as follow-up,
- all automatic actions generated by the system (e.g., customer call-back reminders upon NW inspection, CSI call, etc.),
- all follow-up campaigns launched by Management,
- via integration with LeadIT, all leads and tasks assigned to the employee
- tasks that must be completed on today's date.

Only five customers will be shown per item. Click on *More* to view all unprocessed tasks to date.

The link under *Name* takes you the customer record. The *Correspondence type* is indicated with the corresponding icon. The transactions stored here match the customer's correspondence entries. Clicking on the exclamation mark under *Complete* identifies the transaction as closed and removes it from the list. The *Incoming / Outgoing symbol* indicates the communication channel. Click on any stored (e.g., a letter) files to open them. *Subject* and *Description* display additional text as the mouse hovers over them. The same applies to calendar entries.

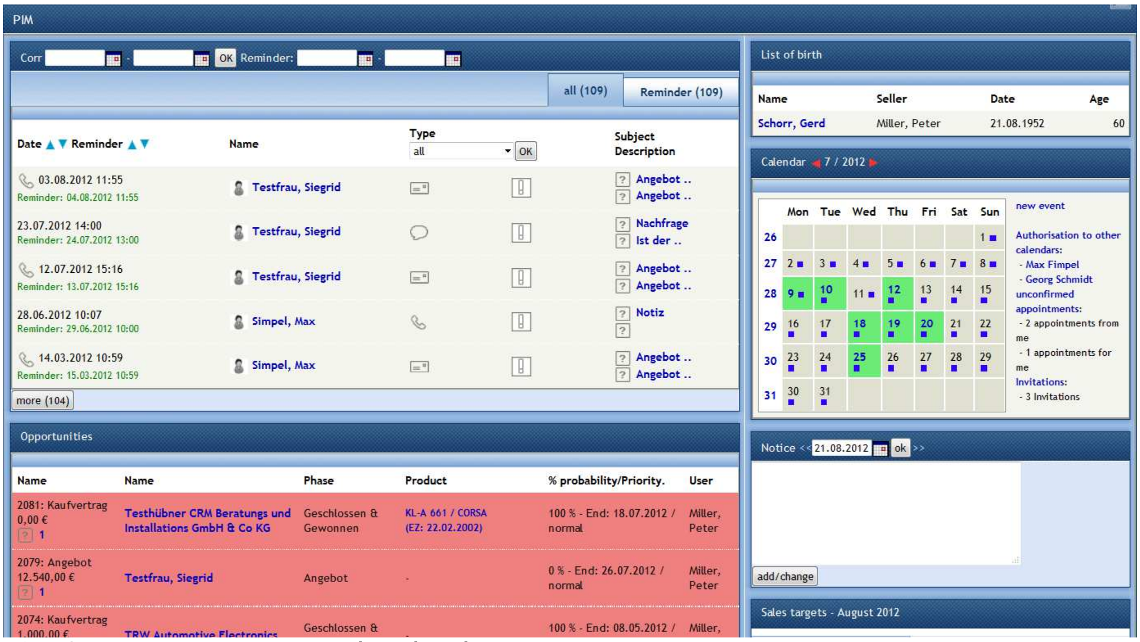


Fig. 9.1: PIM view with calendar entries

9.2 Anniversary list

There are two ways to view the anniversary information for directly managed customers:

- the short anniversary list shows today's anniversaries;
- the long anniversary list shows all birthdays for the past five and future five days.

Regardless, administrators see all anniversaries.

9.3 Pinboard

The pinboard is used as a “blackboard” for the entire company. Only the entries deemed relevant for the current user will be displayed. Ultimately, this depends on the user group assignment of the employee. The display occurs either in the menu item *User / Pinboard* or in the PIM according to the user settings.

Pinboard entries can be created and modified by the authorized employee under Management / Pinboard entry.

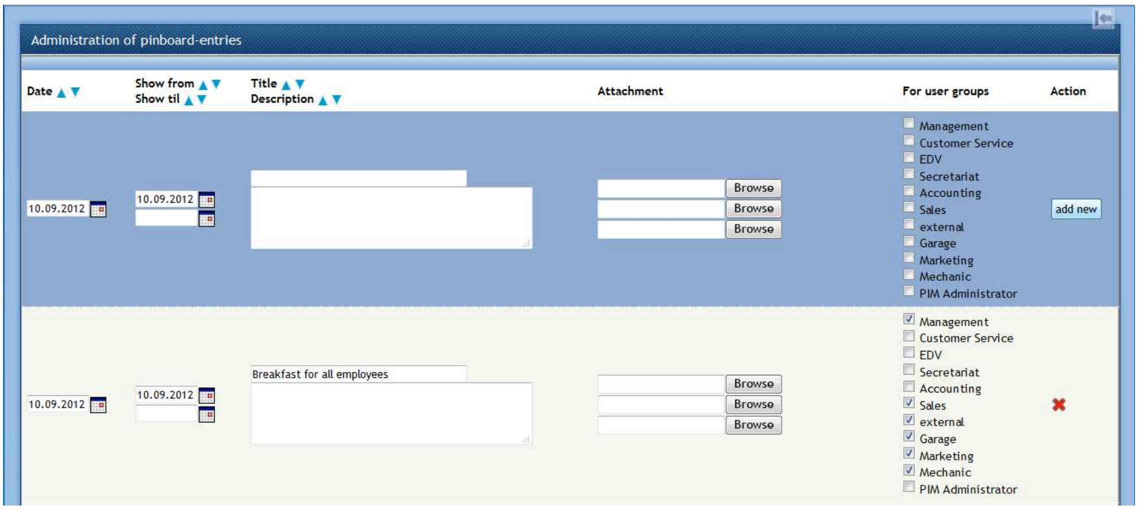


Fig. 9.2: Creation of bulletin boards entries

The first row is intended for new entries while existing bulletin board entries are shown below.

New entries require a *title*, *description*, and a creation date (by default, the current date is chosen). Entries may have up to three attachments (e.g., agenda, business record, etc.) selected from the local computer or the CRM server The User group determination dictates the assignment and display in the PIM.

The new entry must be confirmed with the button *Add new*. From this point on, the bulletin board entry is visible in the bulletin board. As a pre-requisite, the actual date must fall between the *Show from* and *Show to* dates.

Click on the red X to delete the entry from pinboard. The subject will be show in the PIM. The exact text appears as you hover over it with your mouse.

9.4 Online user

Any user who comes online appears immediately in the list of *Online users*. Administrator and employees pertaining to the PIM-Administrator group have the right to logout inactive users by clicking on *Logout*, and thereby releasing inadvertedly used licences for others.

9.5 Messenger

If the communication tool (Messenger) is enabled, it appears in the lower right section of the PIM and the Start portal. The messenger window can be used to send short messages to other users. Short messages that fail to send, for example because their recipient is not online, are delivered the moment he/she comes back online.

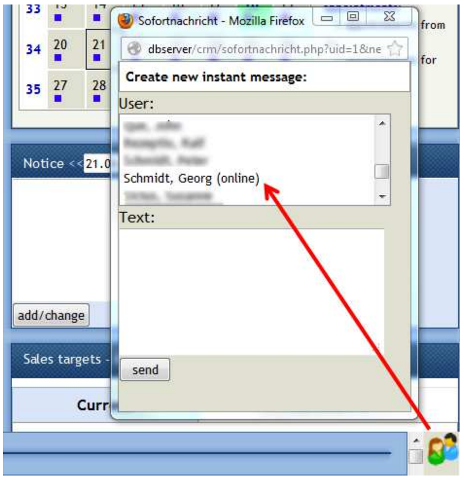


Fig. 9.3: Messenger

9.6 Calendar

The calendar may be called from various CRM positions including the PIM, the menu item *User / Calendar*, the Group calendar, etc.

All users have their own calendars. Moreover, users may assign read or read/write rights to other users. User-specific calendar can be created under *Administration / Additional calendar*.

Each calendar entry with a reference to a customer or prospects is associated with a correspondence entry, which is visible at the record level.

9.6.1 Entering a new appointment

Appointments can be entered in various ways:

- under the menu item *User / calendar view,*
- In the link *Appointment* of the area Quick correspondence in the customer overview,
- through the PIM calendar, by clicking on the small, blue rectangle in the corresponding day.

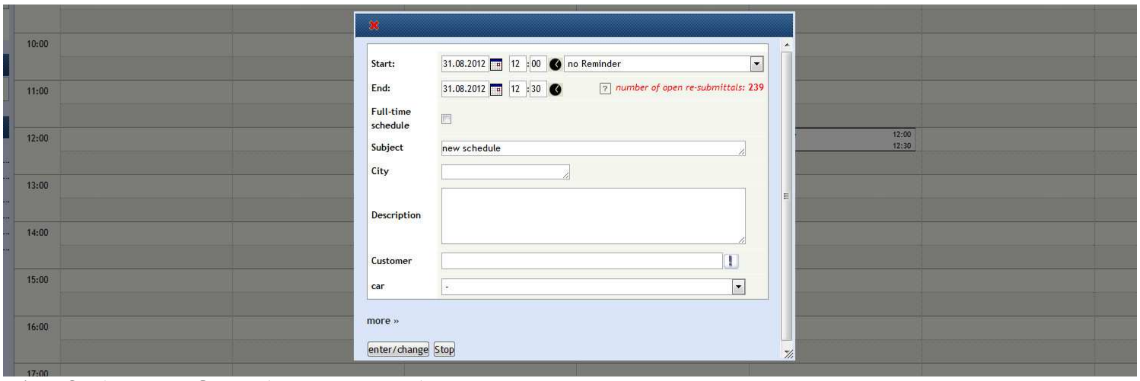


Fig. 9.4: Creating an appointment

All details for the new appointment are entered in the entry form.

Start / End: Date and time

Reminder: Option to set up a reminder for this appointment; by default, the time set up by the user in Personal settings will be displayed

All-day event: No time specified, event blocks the entire day

Subject: Entry of a short explanatory information

Location: Appointment location

Description: further appointment information

Customer: If you reference a customer, the search results appear automatically. The appointment appears also in the customer correspondence under this reference.

Vehicle: Reference to a vehicle that the previously selected customer has been assigned.

Manager: Selection of another CRM user in case the appointment falls in an absence period.

Private appointment: The appointment is only displayed and available for this login. Other users with read rights will only see a *Private appointment* text

Category: Selection of an existing category or creation of a new one

Follow-up appointment: recurring appointment in the same period

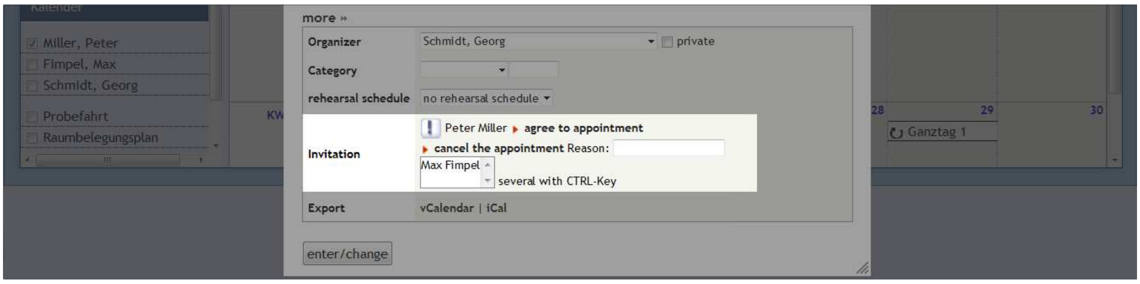


Fig. 9.5: Appointment creation - Invitation

Invitation: Invitation of other CRM users to the appointment. These must confirm their attendance; a checkbox is provided to that end. Use the red X to cancel any invitations.

Export: calendar entries are exportable in the vCalendar and ICal formats. Click on the name to open the Save / Open window.

As you click the button *enter/change*, the event is saved and shown in the calendar.

9.6.2 Releasing a calendar

This function can be called through the menu item *User / Calendar release* or directly from the calendar in the PIM.

Fig. 9.6: Calendar release

The overview will display the links to other released user calendars. Next to the link, you will see information on the calendar rights granted (e.g., write rights for full access to the calendar). Click on the link to access the calendar of the corresponding owner.

In the view below, you may control the access of external users to your own calendar. Next to the user list, there are two check-boxes where you can specify your calendar access rights, i.e., read or write. If you select write rights, read rights are automatically checked for this user.

Alternatively, you can open other released calendars in the PIM calendar area or through the calendar selection in your own calendar.

9.6.3 Open appointments

All appointments to which you were invited appear under the point *User / Calendar / List of open appointments*.

Fig. 9.7: List of open appointments

Click on the small appointment confirmation symbol to go the corresponding appointment. Next to the creation date, name, and start date, you will find the confirmation date. An exclamation mark indicates an unconfirmed appointment. If there are objections to the appointment created for others, these can enter these comments into a text box, which will appear in *Comments*. The user's confirmation date is found at the end of the row.

9.6.4 Calendar layout

Regardless of how the calendar is called, it will present the following layout:

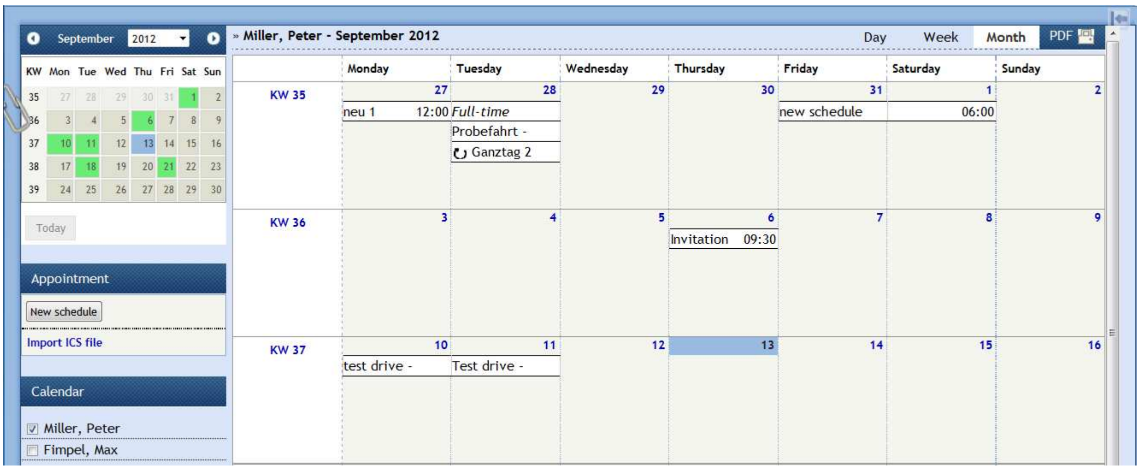


Fig. 9.8: Calendar layout

The *Minicalendar* appears in the upper left section.

Use the arrows in the month name row to display the next / previous month. If are interested in a particular calendar week, click on it in the WK column. Similarly, you may click on a specific day to open the day view. Hover over a background-coloured day to display the appointments therein.

In the lower par, you will find a section containing information on the selected appointment. This can be changed here or a new appointment introduced. Alternatively, you may double-click on the calendar to create a new appointment.

In the area *Calendar*, you own calendar is checked by default.

Depending on the calendar authorizations granted to the current user, he/she may select the calendar of other users or open the group calendar.

In the larger area to the right, you can find the selected *Calendar*.

Regardless of the period selected in the Minicalendar, all appointments will be shown here. The calendar view can be modified through the *Day / Week / Month* selection field. CRM users may define a standard calendar view in their Personal settings.

A PDF calendar sheet can be created by clicking on *PDF*.

9.6.5 Calendar of all employees

Use this menu item to obtain a summary view of authorized appointment calendars for all employees.

Fig. 9.9: Calendar of all employees

From here, provided the required write rights to the employee's calendar have been granted, you may directly create an appointment for the corresponding employee by clicking on the blue rectangle of any day.

9.7 Tasks

Tasks are always user-specific. Under the menu item *User / Tasks* or by clicking directly in the PIM, you may enter a new task in the top row of the screen. The customer reference appears as a field tip while the search results appear below; click to select a customer (check instead of exclamation mark). Recurrence and Progress are further entry options.

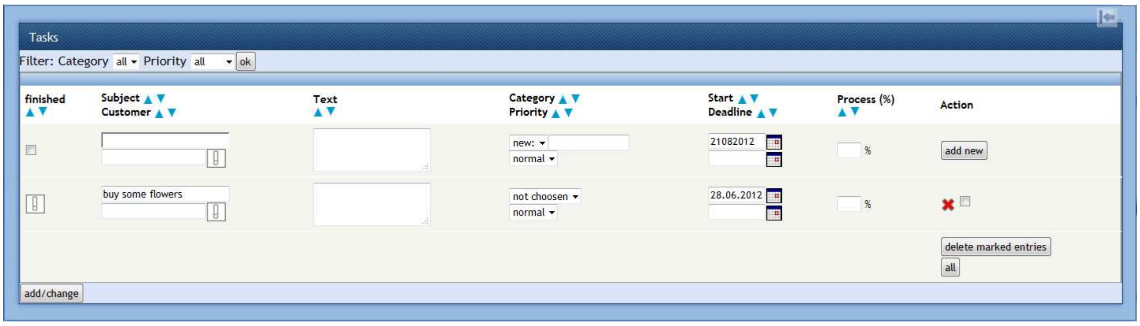


Fig. 9.10: Task entry

Click on the check or the exclamation mark to change the task status to completed or pending respectively. If a task has a customer reference, a customer correspondence entry is also created.

Open tasks appear in the PIM.

9.8 Notices

You have the option to create specific notices at a certain date. Please note that these notes are bound to a fixed date and can only be reviewed on that date upon first view.

9.9 Offers and sale contracts

Offers created by employees in CRM appear in the PIM until closed. The background colour indicates whether offers are still current or 14 days or more overdue.

9.10 Complaint management

All complaints under the responsibility of the logged-in user and pending are displayed with creation date, customer name, and complaint number in the PIM. Hover your mouse over the information window to view all complaints stored therein.

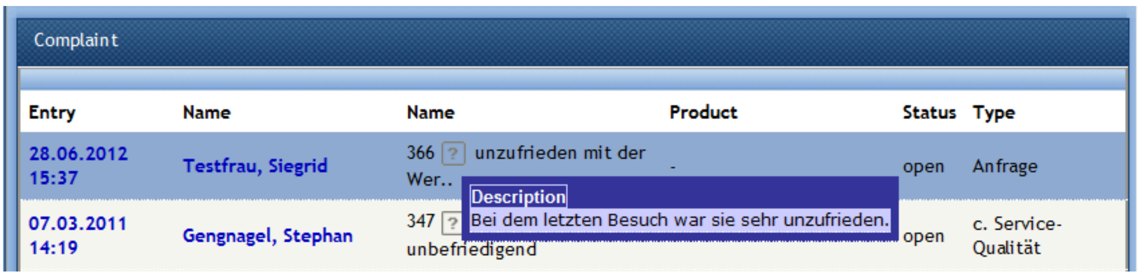


Fig. 9.11: Complaint management

9.11 Filter

Results list of filters for which the user is authorized can be shown in the PIM. To that end, select one more filters under *User / Personal settings*.

9.12 Sales targets

The reference values for vehicle trade previously set in the menu item *Action / Sales targets* are displayed here for each user and compared to the actual values. Here, you can view the current month or the year-to-date report

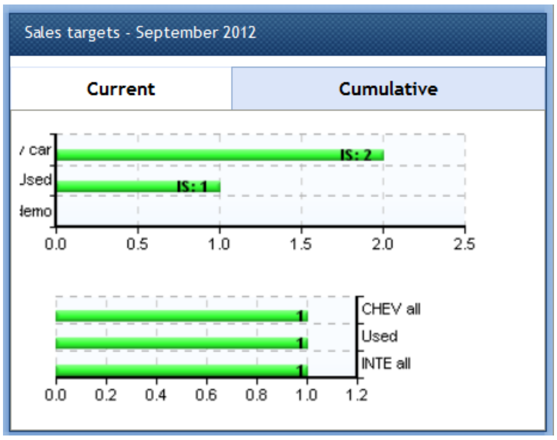


Fig. 9.12: Sales targets

10 Forms and workflows

User-defined forms can be used to represent reflect personal circumstances. For example, you may use them to create approval powers, car delivery protocols, or delivery notices.

A form is first created and then linked to a vehicle and / or any related documents. Form fields are automatically filled from the links. For example, an individual word document can be created.

10.1 Creating a form

Access form management under the menu item *Administration / Forms*, where new forms can be created and existing ones modified.

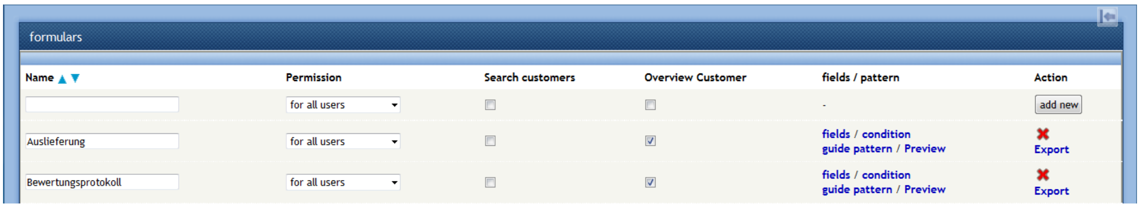


Fig. 10.1: Forms management

Besides the *Name* (name of the form) and *Rights* (which user group can see this form), two additional check boxes are available.

Search customer allows customer search directly from this form. *Customer overview* shows this form directly in the overview page of the client, so it can be automatically filled with customer data.

To the right appear the following values:

Fields:	Definition of the values in the form
Conditions:	Execution of follow-up actions upon certain conditions.
Guide pattern:	Graphical form adjustment
Preview:	Display a preview of the completed form
Red X:	Delete the form
Export:	Export option for administrators

10.1.1 Creating form fields

After creating a new form, define the fields that will appear on the form.

Let us take a vehicle transfer protocol as an example. Customer data should automatically appear on the form next to the fields "Letter number", "Radio code card", and "Key". These three fields will be created in the *Fields* area.

You can select different field types for each field created.

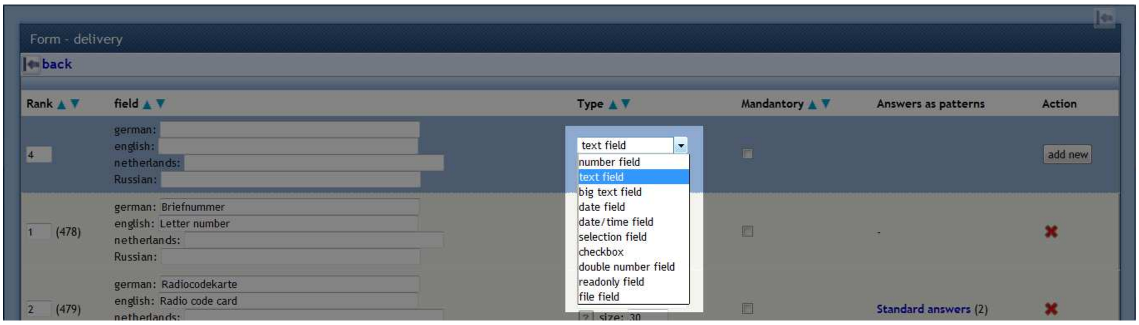


Fig. 10.2: Field types in form

Number field:	Number field
Text field:	Text field (single line)
Big text field:	Field for multi-line text (the number of rows and length is defined by the field size)
Date field:	Date field (dd/mm/yyyy with date calendar to select)
Date / time field:	Date field with time (dd/mm/yyyy hh:mm)
Selection field:	Pull-down menu with defined values
Checkbox:	Checkbox field
Double number field:	Number field with decimal places
Readonly field:	Read-only field
File field:	Option to upload a file to CRM

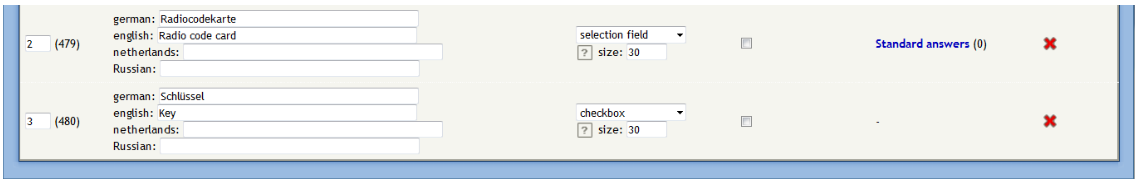


Fig. 10.3: Field types in form 2

In this example, the letter number is a text box with ten characters, the radio code card is a template field with two standard answers, and the index field is a checkbox.

Accordingly, the form preview looks as follows.

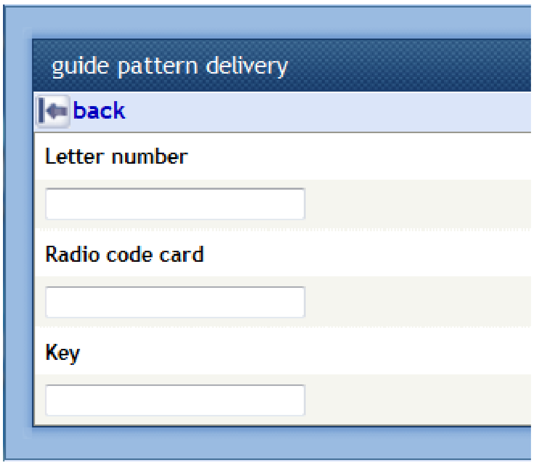


Fig. 10.4: Form Preview

10.1.2 Formatting forms

In the template region, you can introduce changes to the form or add new form fields by changing the HTML source code.

In this example, the master data fields of the customer should be available. This is accomplished by clicking on the right area.

Fig. 10.5: HTML template

The HTML template preview appears as follows:

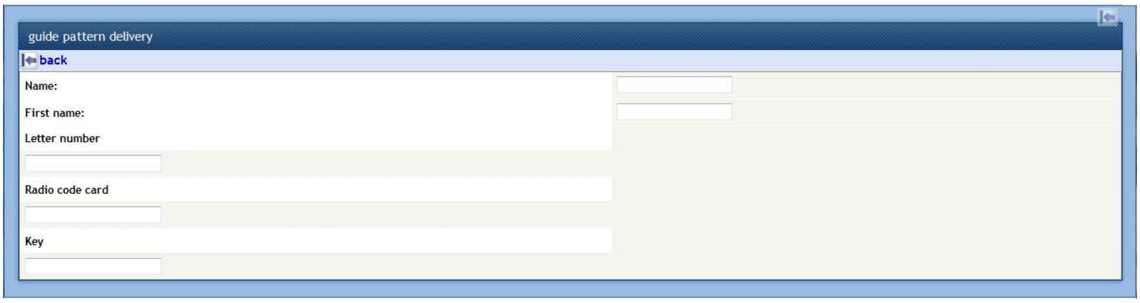


Fig. 10.6: Form Preview 2

If you open the form from the Customer overview, the fields first name and name will be automatically filled and could be modified as well.

If these are read-only fields, the box *Display only* must be checked before the field is transferred to the template.

Additionally, the fields ID and chassis number are shown in the sold vehicle form. This requires defining a relationship with a vehicle, so that a list of all customer vehicles is displayed. Moreover, a reference to invoices or correspondence entries will be created.

In the form template, three pull-down menus are set in the far right area. Select the appropriate fields to appear on the form.

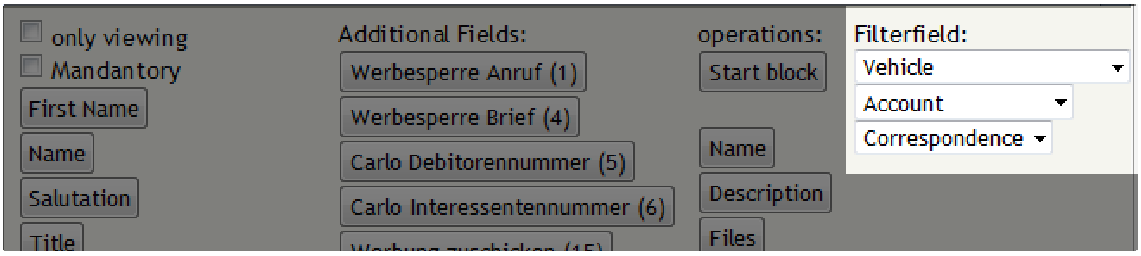


Fig. 10.7: Filter fields for forms

After selecting the fields *Identifier* and *Chassis number* , the form looks as follows:

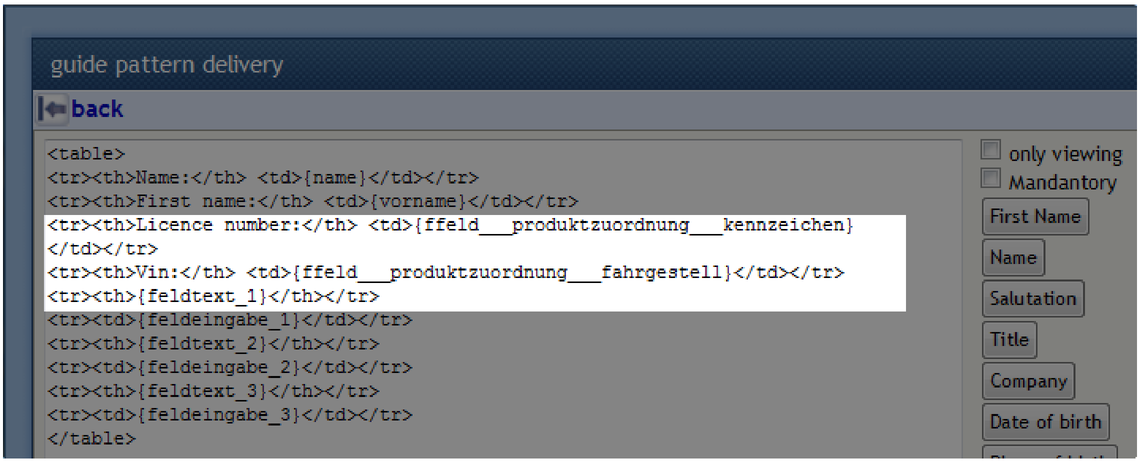


Fig. 10.8: Filter fields in the HTML template

However, no connection to a customer / vehicle is yet available in the template:

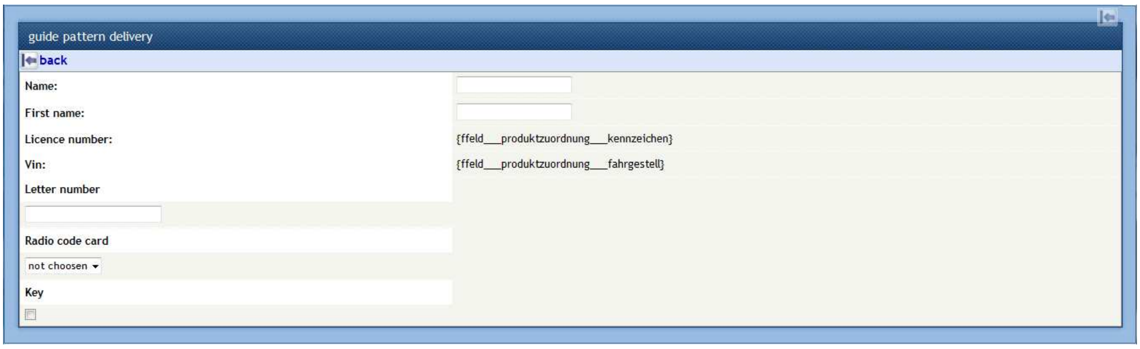


Fig. 10.9: Form Preview 3

10.1.3 Filling forms with data

In the Customer list and Master data, there is an area where new customer forms can be created:

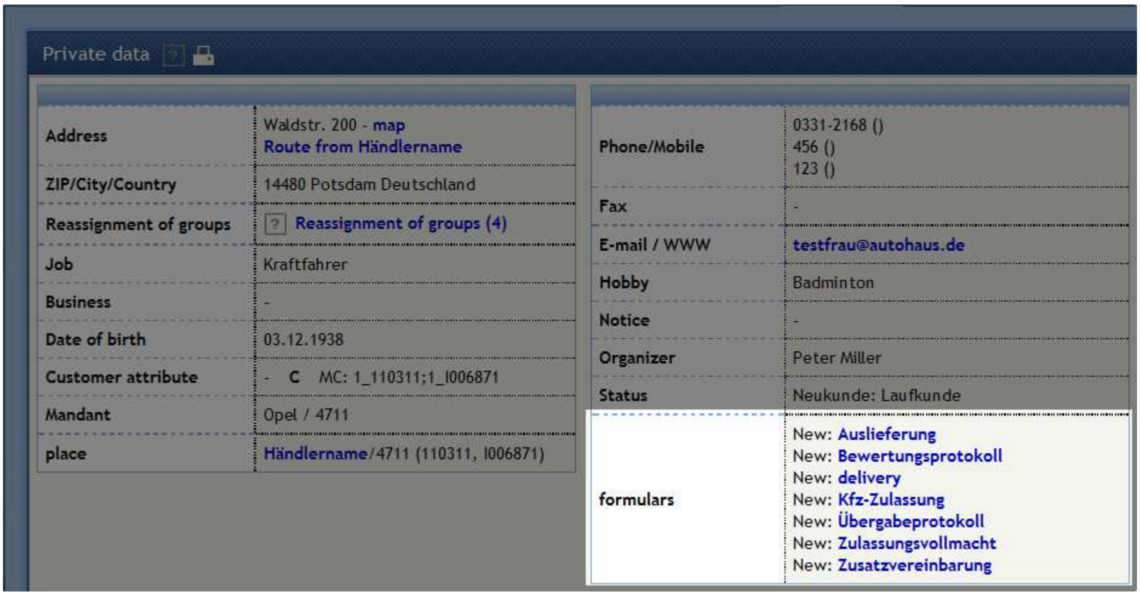


Fig. 10.10: Forms in the customer overview

Click on the form to open a window with the form whose first line will display a pull-down menu with all customer vehicles. After selecting a vehicle, the form will be filled with the correct content. The last three fields will be filled manually.

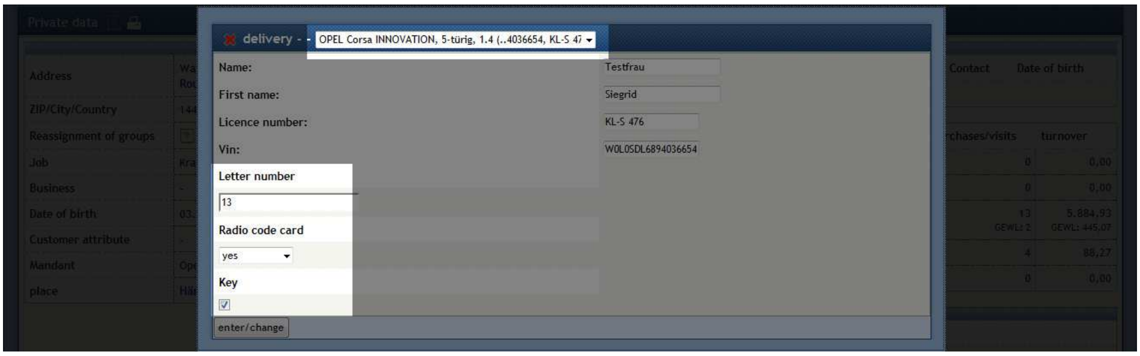


Fig. 10.11: Form Window

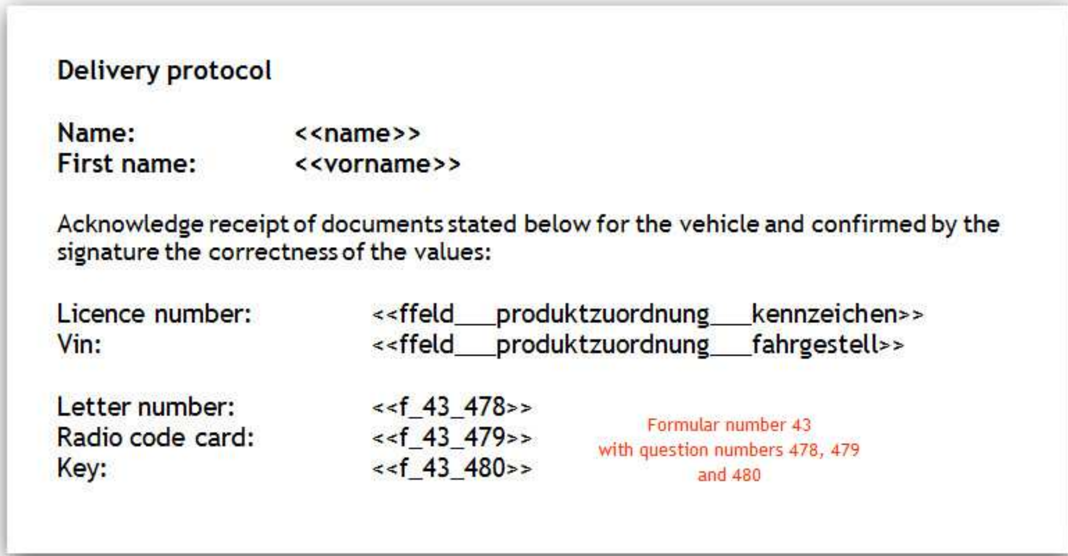
10.1.4 Combining forms and documents

You can create an individual document from a form.

To that end, the following is required:

- Create a mail-merge with the corresponding fields
- Add a new field to the form with question "Subsequent action" and response "Letter"
- Define a macro for letter creation
- Create a macro in the form to create the letter

The RTF file might look like this:



Delivery protocol

Name: <<name>>
First name: <<vorname>>

Acknowledge receipt of documents stated below for the vehicle and confirmed by the signature the correctness of the values:

Licence number: <<ffeld___produktzuordnung___kennzeichen>>
Vin: <<ffeld___produktzuordnung___fahrgestell>>

Letter number: <<f_43_478>>
Radio code card: <<f_43_479>>
Key: <<f_43_480>>

Formular number 43 with question numbers 478, 479 and 480

Fig. 10.12: RTF template

Thus are used the fields from the form (ffeld__. ..) while the fields <<f_formular_id_formular.frage_id> > help access the form answers.

10.1.5 Importing the template into CRM

When importing the document into document administration, it must be considered that the data field mapping <<ffeld..>> is not yet recognized in the current system. The field mapping must be selected in such a way that this field is assigned afterwards.

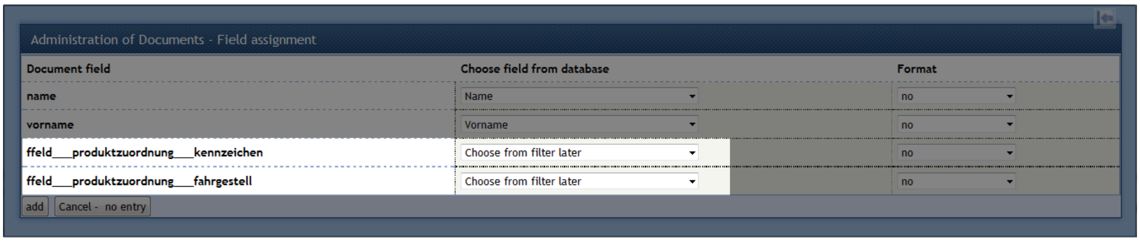


Fig. 10.13: Document Administration

10.1.6 Creating macros for document generation

We can define a macro for the created mail-merge (transfer protocol) so that the document is automatically generated.

In the macro, select the action *Create letter (Pool)*. In the field *Document*, the previously created mail-merge must be selected. Optionally, you may enter a letter and a description.

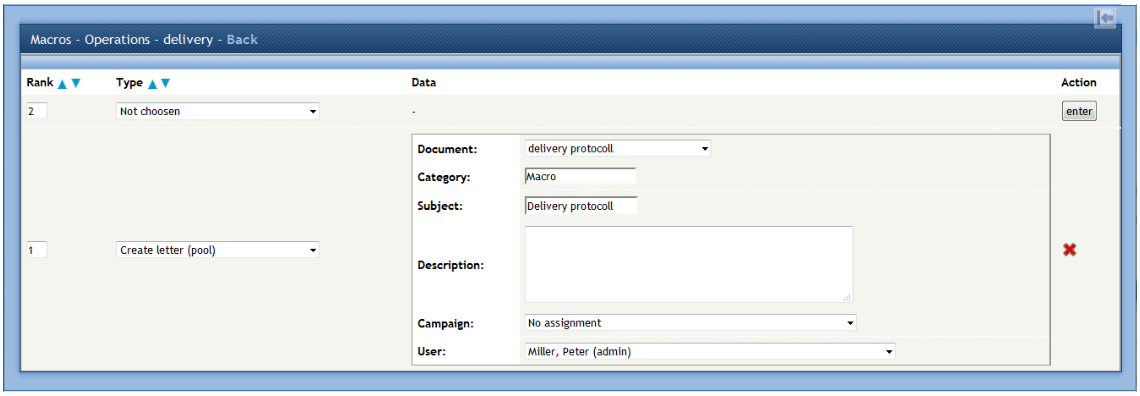


Fig. 10.14: Creation a macro

10.1.7 Extending forms to incorporate additional condition fields

An additional field must be added to the form so that CRM knows when to automatically create the macro-generated letter. To that end, a new field called *Next action* is defined with the default word *Letter*. This is done under *Administration / Forms*, by clicking on the link *Field* in the corresponding form. An additional field of type Template is defined.

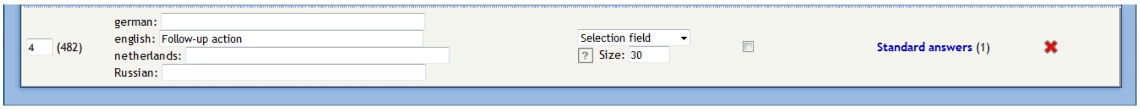


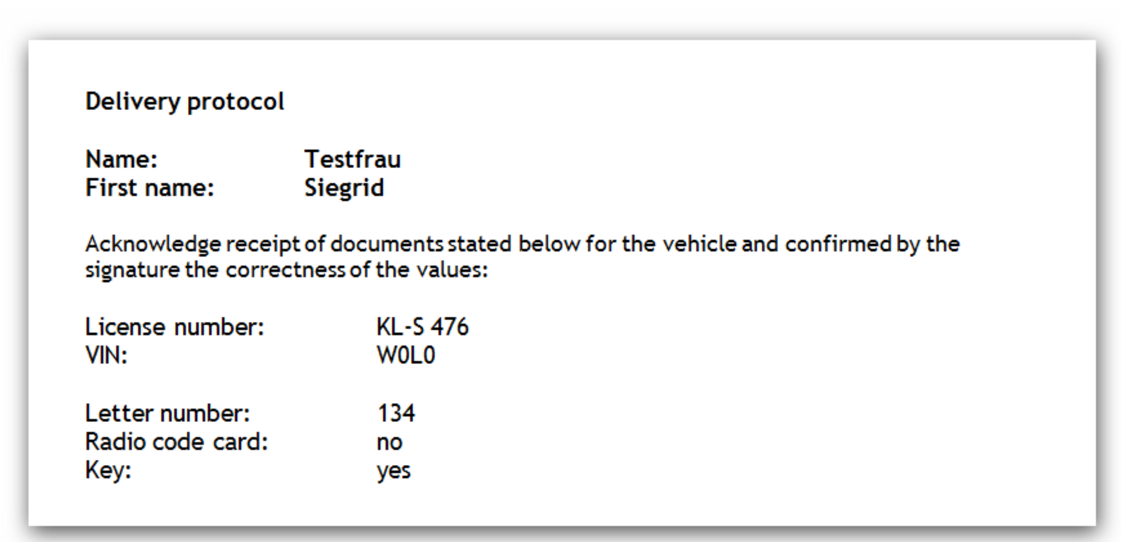
Fig. 10.15: Extending the forms

10.1.8 Linking macros and forms

Finally, you must connect the macro with the form. To do this, click on the field *Conditions* in the form area. Firstly, select the appropriate macro from the pull-down menu. Secondly, you must determine the macro execution schedule. The letter should be created whenever the answer to the subsequent activity = *Letter* (please ensure a 100% identical spelling).

Fig. 10.16: Adding conditions

The final and completed Word document looks as follows:


Delivery protocol

Name: Testfrau
First name: Siegrid

Acknowledge receipt of documents stated below for the vehicle and confirmed by the signature the correctness of the values:

License number: KL-S 476
VIN: W0L0

Letter number: 134
Radio code card: no
Key: yes

Fig. 10.17 : Created document

10.2 Defining workflows

Use the menu item *Management / Form Workflows* to define new form entry processes (first row). As usual, all existing workflows appear below.

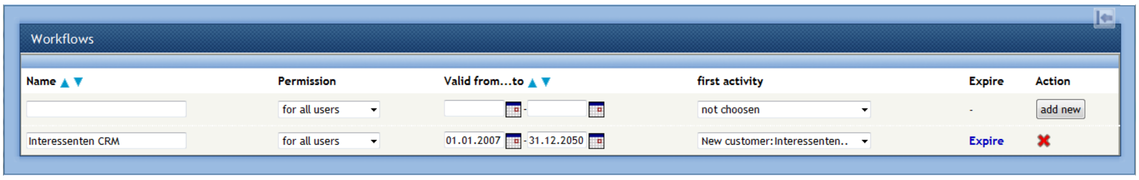


Fig. 10.18: Defining workflows

After entering a name, granting access rights, setting its scope (can be left open) and the first activity, you can define a workflow. The first activity determines whether the workflow starts as a new customer record is created (if so, it is called New entry). Accordingly, it be directly assigned to the selected customer group and can be also found in the homonymous filter group. After entry of a new workflow, the *Process* can be defined by clicking on the link.

Fig. 10.19: Workflow steps

Here, the previously defined forms are available for selection and their sequence determines in which order they will appear during the entry process. Use the X cross to delete any process steps including those in the level above the workflow itself.

11 Macros

Macros are used to automatically execute a defined action. For example, in a call script, a negative response to a specific question may be specified as a condition which, if met, automatically triggers the creation of a follow-up or the submission of an e-mail to the customer manager to address the problem.

Macro execution can be scheduled at certain times. For example, you might want to configure a night macro execution depending on installation. Macros are based on either filters or conditions set in call scripts or forms.

11.1 Defining macros

Go to the menu item *Management / Macros* to access the macro definition (first row) and change form (remaining rows). For new macros, you must enter a name and set the corresponding access rights.

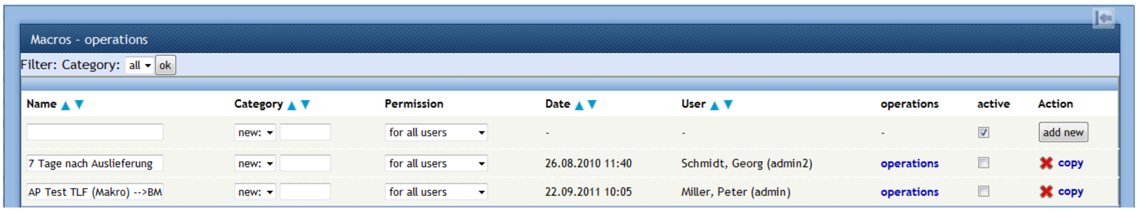


Fig. 11.1: Macros

The box *Active* determines whether the macro should be run or not. Click on *Add Macro* to save your macro and then define its details. This can be accomplished by clicking on the link *Actions*. Here, you can define any number of steps to be individually processed upon macro execution.

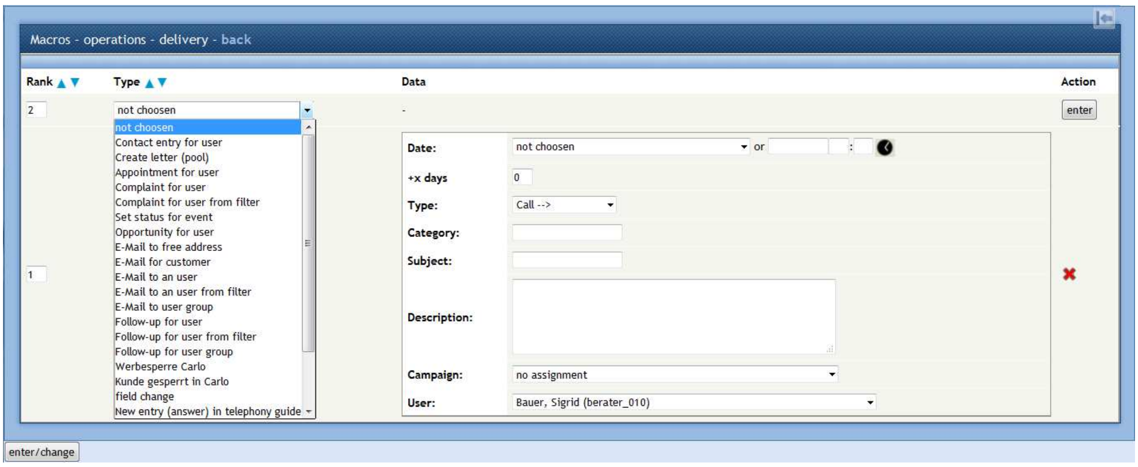


Fig. 11.2: Creation of macro actions.

Contact entry for user: a regular customer correspondence entry is created. Find further information on its parameters in the chapter *Correspondence*.

Create letter: a letter is placed in the Outbox awaiting printout. Select the previously created mail-merge template in the field *Document*. A customer correspondence entry is created.

Appointment for user: an appointment is entered in the selected user's calendar.

Complaint for user: a customer complaint is assigned to the selected user.

Complaint for user from filter: a complaint entry is entered; the user is, however, selected from the filter, and the corresponding filter field is selectable.

Set event status: after selecting the event and its status, the macro execution creates a corresponding entry.

Offer and sale contract for user: a new customer offer is created; the user is eligible, as are the parameters of the potential transaction.

E-mail:

- to open address: the e-mail address can be entered directly. For submission to multiple addresses, use the ";" character as separator.
- to customers: it will use the first registered e-mail address of the customer for submission. If none exists, no e-mail is sent.
- to users: the user is eligible, only users with a valid e-mail address are displayed.
- to users from filters: here the user is obtained from the filter result. If the user has no e-mail address, no e-mail is sent.
- to user group: if a collective e-mail address is available for a user group, this will be the recipient's address. In addition, all employees who are assigned to this group and have a valid e-mail address will receive an e-mail as well.

WVL: a follow-up is created and made available in the user PIM or called up with a reminder.

- for users: the follow-up is created for an individual user.

- for users from filters: follow-ups will be created for all users from the selectable filter field.
- for user group: follow-ups will be created for all users in the selected group.

Advertising lock: for customers, the advertising lock is checked in the master data set.

Customer locked: the customer is locked.

Field changed: a value can be written to the customer's master data or additional field. Entered values are overwritten.

New script entry: enters an automatic entry in a customer script. The question can be selected and the response value can be entered as free text.

No answer in script: Customers in a call script will automatically receive the entry and leave the script.

Export filter content: the filter content can be automatically sent via e-mail to an open e-mail address. It is important to note that all filtered customers obtain a correspondence entry and that the filtered customer`s number determines the number of e-mails sent. It is recommended, therefore, to create a filter in which only one employee is saved.

To better represent WVLs, E-mail, contact records, and complaints, it is possible to display data fields. This applies to the subject line and to the description field. Here, we distinguish between macros that are triggered in the Call centre and the rest.

For Call center-triggered macros, the following fields are available:

Master data manager *(last name, first name)*	{betreuer}
Master data manager *(first name, last name)*	{breteurervn}
Invoice number	{rechnung_nr}
Invoice order number	{rechnung_anr}
Invoice amount	{rechnung_betrag}
Invoice date	{rechnung_datum}

Master initials	{rechnung_meister}
Type	{rechnung_art}
Area	{rechnung_bereich}
Order text	{rechnung_text}
Manager	{rechnung_betreuer}
Client	{rechnung_mandant}

To that end, there must be only one order field in the filter list view which is linked to the script so that it fills this value. Otherwise, all remain empty.

The same applies to vehicle data. A vehicle field must appear in the results.

First release	{fahrzeug_ez}
Type	{fahrzeug_typ}
License plate	{fahrzeug_kennzeichen}
Mileage	{fahrzeug_kmstand}
HU	{fahrzeug_hu}
Transfer	{fahrzeug_uebernahme}
VIN	{fahrzeug_fahrgestell}
Seller	{fahrzeug_verkaeufer}
Last visit	{fahrzeug_letzterbesuch}
Brand code	{fahrzeug_markencode}

Additionally, you can insert fields from the call script:

Complete script (questions and answers), if the macro is called after a script entry {lftext}

Question and answers from the script {frage/antwort_lfid_fragerang},

lfid = Script ID

fragerang = order of the script questions

In addition to the fields exclusively intended for call center macros, there are items suitable to connect to complaints management, e-mail submission, inserting contact entries, and follow-ups / reminders. These must be available in the list view of the filter so that they can be replaced.

Fields from the correspondence area include:

Manager	{korrespondenz_betreuer}
Subject	{korrespondenz_betreff}
Description	{korrespondenz_beschreibung}
Category	{korrespondenz_kategorie}
Date of the vehicle:	{korrespondenz_datum}
License plate	{kennzeichen}
Type-model	{typ_modell}
Fabrication year	{datum_ez}
Mileage	{km_stand}
Brand code	{markencode}
VIN	{fahrgestell}
Order supervisor	{auftrag_betreuer}
First name	{vorname}
Name	{name}
Salutation	{anrede}
Customer number	{id}
Title	{titel}
Company	{firma}
Birthday	{geburstag}
Note	{bemerkung}
Phone_1 (P)	{telefon}
Phone_2 (G)	{telefon2}
Mobilephone_1 (P)	{handy}
Mobilephone_2 (G)	{handy2}
E-mail (P)	{email}
E-mail (G)	{email2}
Fax (P)	{fax}

Fax (G)	{fax2}
Adress	{adresse}
ZIP	{plz}
Location	{ort}
Master data manager *(last name, first name)*	{betreuer}
Master data manager *(first name, last name)*	{breteurervn}

Master data fields must not appear in the list view, because customers are always available there under a master record ID.

The name of the currently logged-employee is filter-independent and is always replaced {benutzername}.

11.2 Assigning macros to filters

Go to the menu item *Management / Macro filter* to assign macros to a filter. For automated execution every 24h -e.g., at night-, all filter results will be executed with the macro, i.e., the macro will be run for each customer in the filter results list.

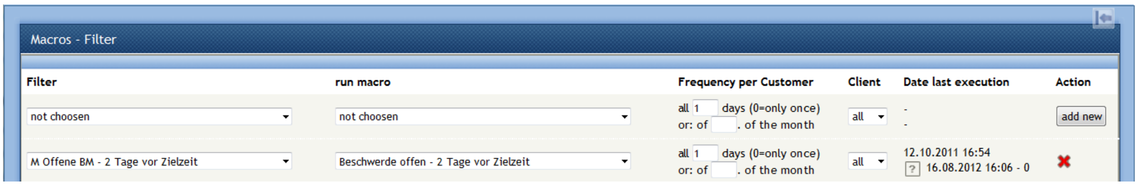


Fig. 11.3: Macro to filter assignment

Frequency per customer determines how often the macro should be run per customer. A 0 value means that the macro will run only once per customer. Higher values indicate the number of days between executions; it is up to the customer to restart the macro, regardless of whether this has previously reappeared in an underlying filter. Alternatively, you can schedule macro execution for a fixed day of the month.

Date indicates the filter-macro assignment entry. *Latest execution* provides information on the last macro execution. The number of affected customers is displayed as your mouse hover over the field.

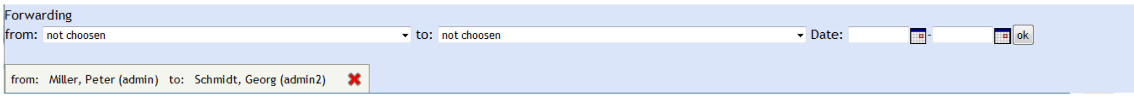


Fig. 11.4: Macro forwarding

The forwarding function at the end of the list can be used to allow macros activated for a certain user to be forwarded to a different one, e.g., during absence. The date area is used to specify a forwarding validity period. All entered forwarding operations appear in the list form below and can be deleted with the red X. Forwarding will also affect the creation of follow-up campaigns in the list view.

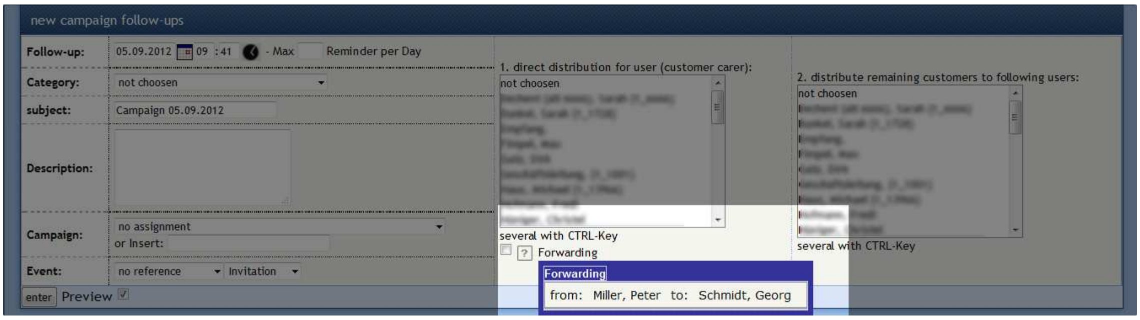


Fig. 11.5: Macro forwarding for follow-up campaigns

Here, you can determine whether the follow-up will be sent to the original campaign manager or to the person receiving the macro forwarding.

11.3 Launching macros

Macros can be automatically launched (e.g., every night depending on configuration) and manually started. This is accomplished through the corresponding menu item. The minimum macro execution interval is 24 hours.

Alternatively, macros can be launched following a specific call script answer or form entry.

12 Reporting

12.1 Sales reporting

12.1.1 Campaign reporting

Campaign reporting is used to report on contact entries with and without campaign reference from user and users groups.

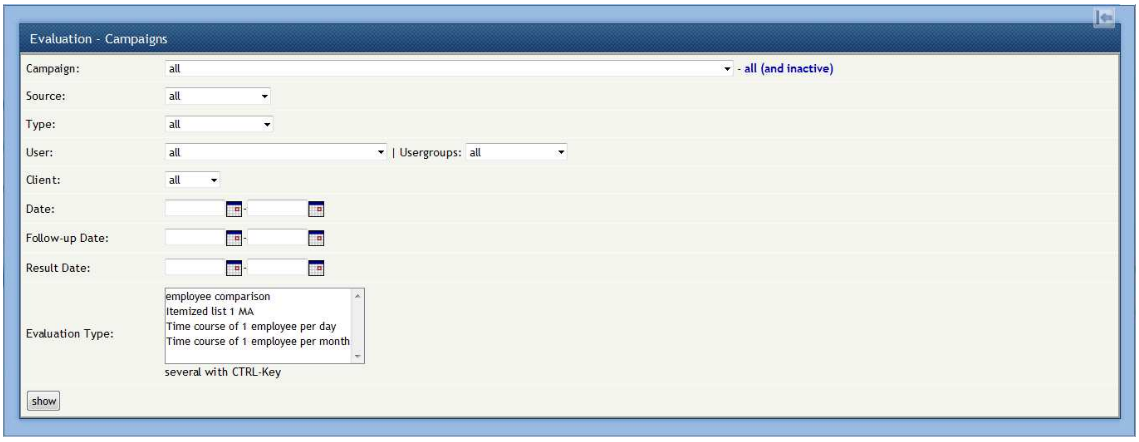


Fig. 12.1: Campaign reporting - Configuration

12.1.1.1 Settings

All campaigns, whether taken from Carlo, originally available in CRM, or created independently under the menu item *Management / Campaigns* in Campaign administration, can be found under *Action / Campaign management*.

By default, only active campaigns are shown in the selection list. If you wish to view all campaigns executed for a certain period, click on *All (also inactive)*.

Furthermore, if the campaign name *All* remains selected, all correspondence entries are included in the report, indexed by relationship.

As a rule, employee contacts are produced without a campaign reference. To that end, a campaign with the name *Unassigned* is provided.

Source: Enter here the lead-contact type. Select *Opel* if dealing with a LeadIT contact.

Type: Those referring to LeadIT as source can select the Lead type.

User / User group: all users are selected by default. You can restrict the scope of the report by selecting a particular user or user group.

Client: use this field if the Company has several clients or storage locations.

Date / follow-up date/

result date: a correspondence entry always has a creation date. Here: Date. You may also enter a follow-up and result date if the user so specified.

12.1.1.2 Report types

You can produce tabular and graphics reports. Furthermore, you can display both the percentage and absolute values of completed and pending/open correspondence entries.

a) Employee comparison

This report compares total and completed correspondence entries for all employees by campaign. The numeric value is shown as you hover over the bars.

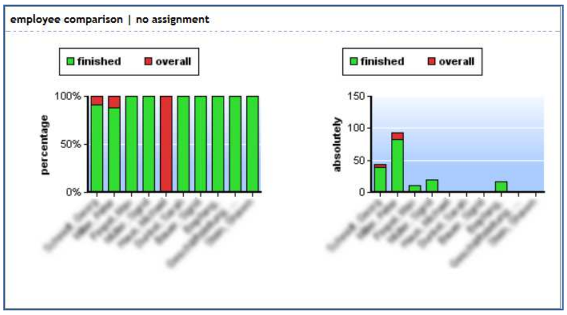


Fig. 12.2: Employee comparison

b) Individual performance: single employee

This graphical report shows total and completed contacts for all campaigns of a single employee. Numeric values appear as you hover over the graphic.

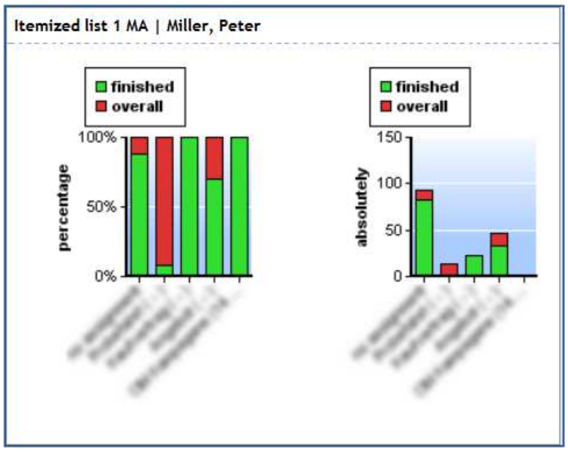


Fig. 12.3: Individual performance: single employee

c) *Daily performance: single employee*

For the selected period, the report shows total and completed correspondence entries by employee per day.

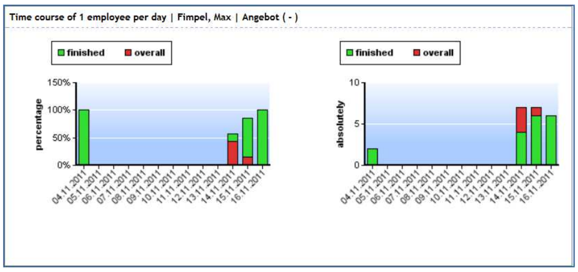


Fig. 12.4: Daily performance: single employee

d) *Monthly* performance: single employee

This report shows all correspondence entries by employee for a range of selected campaigns.

Fig. 12.5: Monthly performance: single employee

Several reports can be selected simultaneously.

You can export report data to PDF by clicking on the *PDF* button.

12.1.1.3 Tabular reports

Below the chart, you can see the tabular representation with employees down the side and values in columns.

Campaign: Probefahrt

User ▲▼	Contact ▲▼	Contact (finished) ▲▼	Count customers ▲▼	Contact per Customer ▲▼	Process (%)
Miller, Peter	? 7 L	28,57 % (=? 2 L)	3	2,33	28,57%
Fimpel, Max	? 5 L	40,00 % (=? 2 L)	5	1,00	40,00%
Sum: Probefahrt	? 12 L	33,33 % (=? 4 L)	8	1,50	33,33%

Fig. 12.6: Tabular reports

Contacts: Correspondence count for filtering. Click on the link to access the customer list view. As you hover over it with your mouse, a transaction-type breakdown is shown (e.g., notices, phone calls, etc.)

Contacts (finished): Here, you can see the completed contacts count (in absolute value and as a percentage over total contacts).

Count customer: This contains the total customer count for filtering purposes.

Contacts per customer: Contact count per customer.

Procress: The bars indicate the conversion progress from open to completed contacts.

12.1.2 Sales process evaluation

Sales process reporting is available under Action / Sales process evaluation and serves to obtain an overview of created offers, sale contracts, and test drives compared with the customer count. Please note that the accurate report information requires the correct maintenance of vehicle data under Administration / Vehicle administration.

12.1.2.1 Settings

Settings include period, vehicle status, user group, and storage location.

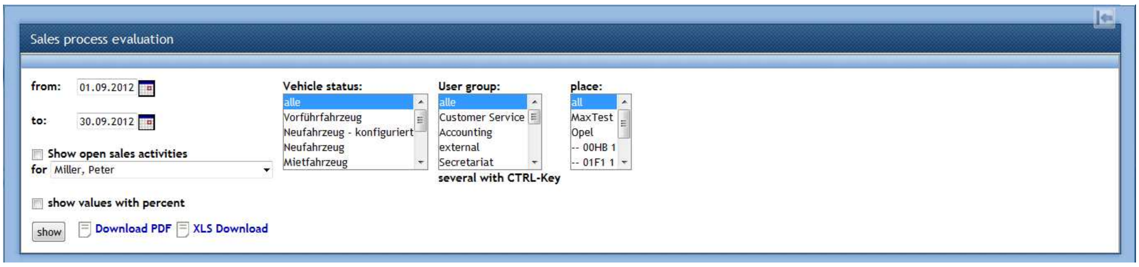


Fig. 12.7: Sales process evaluation - Settings

Two checkboxes can be used to extend the search results:

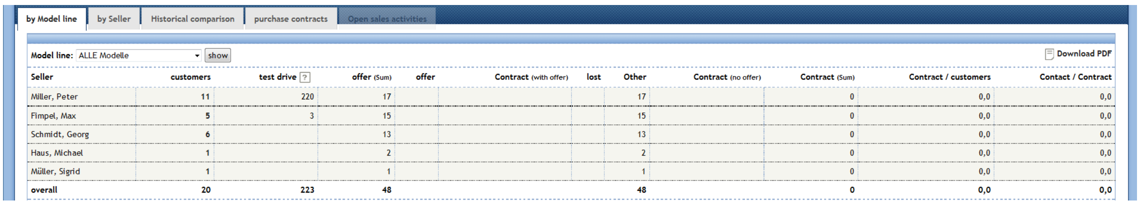
Display open sales activities extends the results to include open offers and test drives of the corresponding employees. Display percentage values shows percentage values for absolute values in the report.

12.1.2.2 Reports

Individual reports can be exported to PDF by clicking on *PDF download* button.

a) by model

All sales transactions by model for all sales persons are displayed.



by Model line | by Seller | Historical comparison | purchase contracts | Open sales activities

Model line: ALLE Modelle show — Download PDF

Seller	customers	test drive ?	offer (Sum)	offer	Contract (with offer)	lost	Other	Contract (no offer)	Contract (Sum)	Contract / customers	Contact / Contract
Miller, Peter	11	220	17				17		0	0,0	0,0
Fimpel, Max	5	3	15				15		0	0,0	0,0
Schmidt, Georg	6		13				13		0	0,0	0,0
Haus, Michael	1		2				2		0	0,0	0,0
Müller, Sigrid	1		1				1		0	0,0	0,0
overall	20	223	48				48		0	0,0	0,0

Fig. 12.8: Sales process reporting - by model

Customers:	All customers/prospects whose contact refers to a vehicle
Test drive:	Count of test drives agreed for a given period
Offers (total):	Total offers issued (percentage over total customers)
Offer:	Total of all sales processes currently in the *Offer* phase
Contract (with offer):	All *closed and won* processes for which an offer was previously created (percentage over contract total)
Lost:	All *closed and lost* processes
Other:	Total sales processes in any of the following statuses: *Stand-by, Under negotiation, Closed and Lost / Other customer, Closed and New offer.*
Contract (without offer):	Closed contracts without previous offer (percentage over customers)
Contract (total):	Total of all sales contracts, with or without previous offer (percentage over total customers or offers (total))
Contracts / Customer:	Count of contracts per customer
Contact / Contract:	Count of contacts per contract

The results are shown graphically at the end of the table.

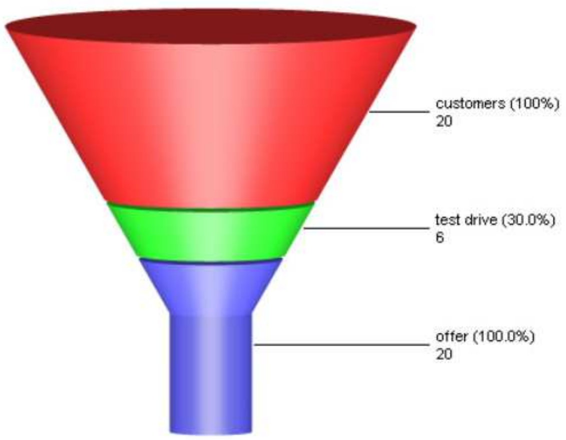


Fig. 12.9: Sales process graphical reporting - by model

Customers:	Total count of customers considered
Test drive:	Total number of test drives
Offer:	Total number of offers (percentage over customers)

b) by sales person

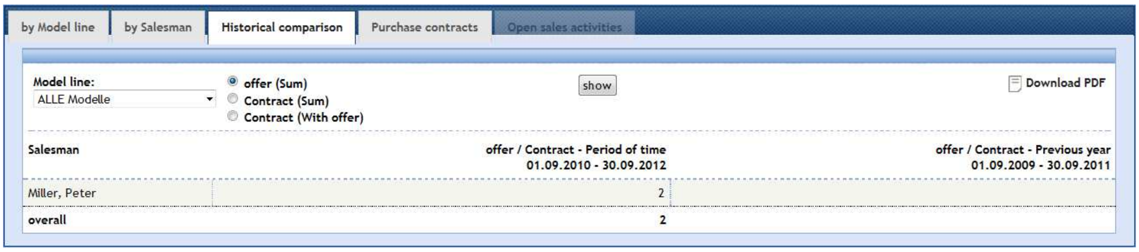
This report shows all sales transactions by sales person for all models. The column layout is identical to the Model report above.

Model line	customers	test drive ?	offer (Sum)	offer	Contract (with offer)	lost	Other	Contract (no offer)	Contract (Sum)	Contract / customers
OPEL CORSA	3		3				3		0	0,0
INTERNET Sonstige	7	220	7				7		0	0,0
CHEVROLET Gesamt	2		2				2		0	0,0
OPEL MERIVA	1		1				1		0	0,0
OPEL ZAFIRA	2		2				2		0	0,0
OPEL ANTARA	2		2				2		0	0,0
overall	11	220	17				17		0	0,0

Fig. 12.10: Sales process evaluation - by sales person

c) historical comparison

This report shows a year-over-year comparison of sales transaction by sales person.



Salesman	offer / Contract - Period of time 01.09.2010 - 30.09.2012	offer / Contract - Previous year 01.09.2009 - 30.09.2011
Miller, Peter	2	
overall	2	

Fig. 12.11: Sales process evaluation - historical comparison

Here, we distinguish between

Offers (sum):	Count of sales processes in any of the following statutes: *Offer, Offer closed and lost, Offer other status*, and offer turned into contracts.
Contract (sum):	Total of all contracts, with or without previous offer
Contract (with offer):	Contracts with previous offer

d) Sales contracts

This report shows all sales contracts by sales person for the specified period.

Fig. 12.12: Sales process evaluation - Sale contracts

e) Open sales activity

Depending on the sales persons selected in the report settings, this report shows all open offers and pending test drives. This report is time-independent.

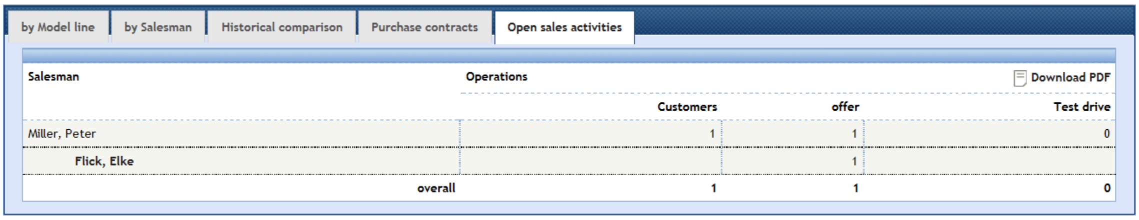


Fig. 12.13: Sales processes evaluation - Open sales activities

12.1.3 Last sales process

The administrator or sales manager can confirm -by checking a box- sales contracts entered in CRM under the menu item *Action / Last sales process*. Only approved sale contracts will be regularly transferred into Carlo through the CRM interface and thus considered in sales process reporting.

Fig. 12.14: Last sales process

Amongst other criteria, sales contracts are displayed by date range, phase, and user (or all of them). Next to creation date, creator, and customer name, the column *Type* in the results list will show the status of the sales process with the corresponding offer and sale contract documents.

The column *Name* contains information on potential financial issues. Furthermore, you can change the type-model assignment and vehicle status, as well as determine whether such vehicle status should be considered in sales process reporting.

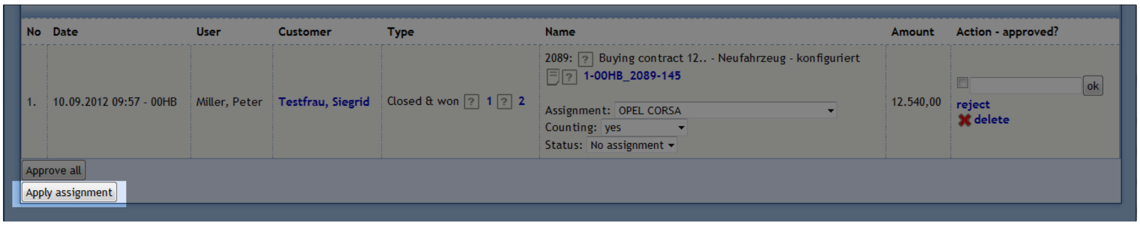


Fig. 12.15: Last sales process - Assignment

If you change any selection field here, the assignment process must be launched by clicking on the button *Apply assignment*.

To confirm a sale contract, check the corresponding box in the column *Action* and click on *OK*. Click on *Reject* if the sale contracts cannot be confirmed. In doing so, an e-mail is sent to the corresponding salesperson provided his/her e-mail was previously entered in User management. This mechanism is also used if the *entry is deleted.* As a result, this disappears from the last sales process list and the sale contract appears with a deletion notice in the customer's correspondence.

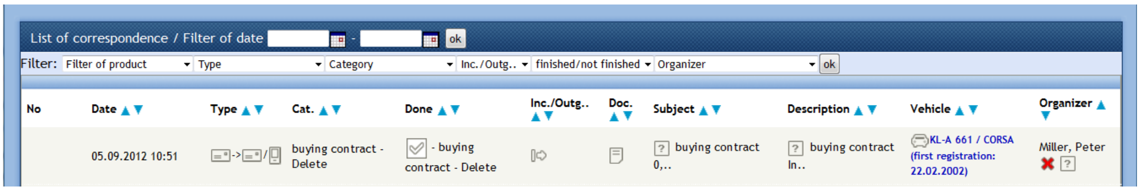


Fig. 12.16: Customer correspondence - Sale contract deletion

The salesperson can view under this menu point all self-created sales contracts and their corresponding status. The salesperson can directly change phase and date information.

As soon as a sale contract is approved, this word will appear under the column Action. In any case, any notices are always shown here.

12.1.4 Sales targets

Sales targets allow sales managers to assign sales target references to employees, measure their achievement level, and compare with business references.

12.1.4.1 Settings

In sales targets administration, you should first select the sales target management period. By default, it is assumed January to December of the current year. In addition, you may find a selection field with the user for which targets are being set.

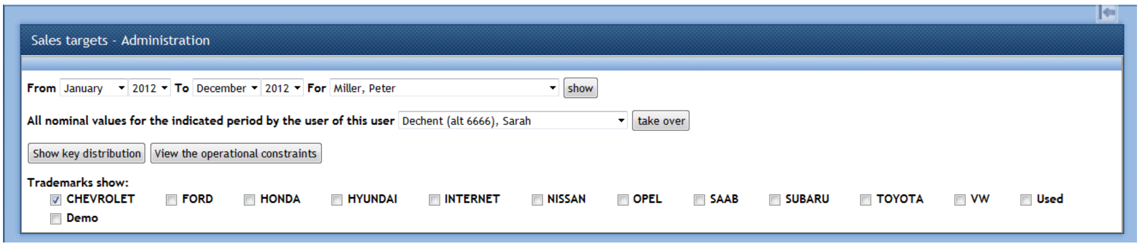


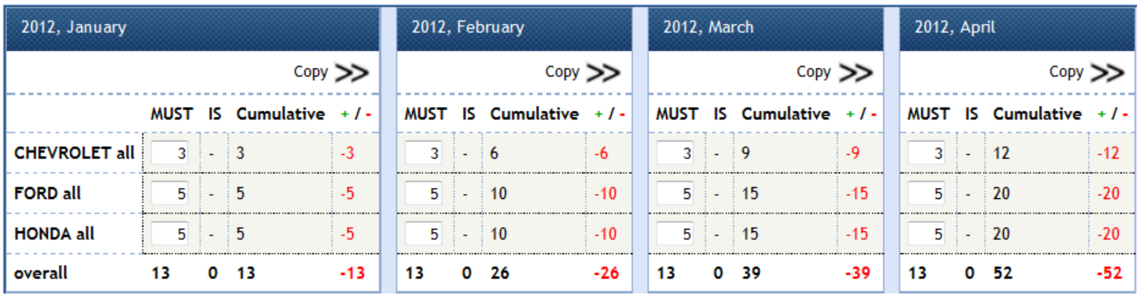
Fig. 12.17: Sales targets - Settings

In the lower section, you can copy the sales target of another employee to the one selected above.

All systems brands eligible for target management are listed here. If a brand is selected, you can set the targets at the model group or brand level depending on installation.

Editing sales targets

You may enter or change the sales target for each type-model or brand in the text field on a monthly basis (*TARGET* column). Next to that, you can find the *ACTUALS* column (count of vehicles of this model sold by the user), *Cumulative* (total sales target for this model from the start of the selected period) and +/- (comparison of sold vehicles against target).



	2012, January				2012, February				2012, March				2012, April			
	Copy >>				Copy >>				Copy >>				Copy >>			
	MUST	IS	Cumulative	+ / -	MUST	IS	Cumulative	+ / -	MUST	IS	Cumulative	+ / -	MUST	IS	Cumulative	+ / -
CHEVROLET all	3	-	3	-3	3	-	6	-6	3	-	9	-9	3	-	12	-12
FORD all	5	-	5	-5	5	-	10	-10	5	-	15	-15	5	-	20	-20
HONDA all	5	-	5	-5	5	-	10	-10	5	-	15	-15	5	-	20	-20
overall	13	0	13	-13	13	0	26	-26	13	0	39	-39	13	0	52	-52

Fig. 12.18: Editing sales targets

Once the monthly targets are set, you can copy them into the next month by clicking on the button *Copy* >>. As soon as all targets have been successfully assigned, the sales targets for this use are stored by clicking on the button *enter/change*.

12.1.4.2 Total targets

Here, all sales targets for a given brand in the selected period are aggregated, shown by model, and compared to the actual values.

overall

	CHEVROLET all	overall
MUST	12	12
IS	1	1

	FORD all	overall
MUST	20	20
IS	-	0

	HONDA all	overall
MUST	20	20
IS	-	0

Fig. 12.19: Total targets

12.1.4.3 View *all users*

If you select the entry *All* in the user list, you will reach a summary table where all actual and target values by model are aggregated and compared by user.

User	2012, January		2012, February		2012, March		2012, April		2012, May		2012, June		2012, July		2012, August		2012, September		2012, October		2012, November		2012, December		Sum	
	MUST	IS	MUST	IS	MUST	IS	MUST	IS	MUST	IS	MUST	IS	MUST	IS	MUST	IS	MUST	IS	MUST	IS	MUST	IS	MUST	IS	MUST	IS
Fimpel, Max	-	-	-	-	-	-	-	-	-	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	0	1
Miller, Peter	13	-	13	1	13	-	13	-	-	1	-	-	-	-	-	1	-	-	-	-	-	-	-	-	52	3
Müller, Sigrid	-	-	-	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	1
Schmidt, Georg	-	1	-	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	3
Sum	13	1	13	3	13	0	13	1	0	1	0	0	0	1	0	1	0	0	0	0	0	0	0	0	52	8

Fig. 12.20: View all users

12.1.4.4 Distribution index

You can use the distribution index to easily distribute sales targets to several users at the same time. To that end, you must enter the distribution index itself and a total target by model.

With the distribution index, a monthly percentage value is defined to distribute a part of the total target per month.

Key Distribution

2012, January	2012, February	2012, March	2012, April	2012, May	2012, June	2012, July	2012, August	2012, September	2012, October	2012, November	2012, December	overall
5,00 %	10,00 %	10,00 %	10,00 %	10,00 %	15,00 %	20,00 %	0,00 %	0,00 %	5,00 %	5,00 %	10,00 %	100,00 %

Fig. 12.21: Distribution index

The total target for each brand model is entered below. In addition, you must select here the corresponding user for the total target distribution via the assignment index.

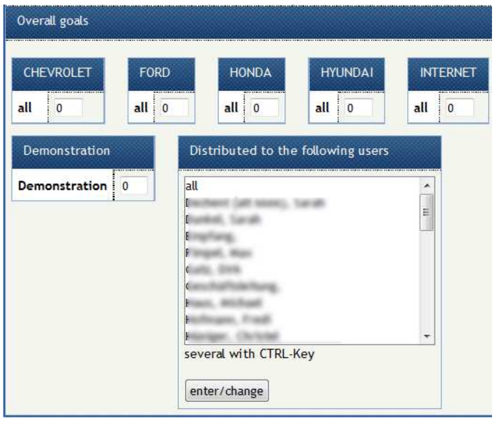


Fig. 12.22: Total targets

In case the total target cannot be fully distributed, the excess will be added to the month with the highest assignment index percentage value.

Important: Please note that, if you select a new user for the selected period as you distribute targets with the assignment index, all existing targets will be overwritten.

Business targets

Business targets are used to compare the manufacturer's targets with the actual vehicle sales. To that end, you must maintain the targets at the model level for a given period.

As you click on the button *Display business targets*, it appears a form similar to the Distribution index view whereby you can manage said targets.

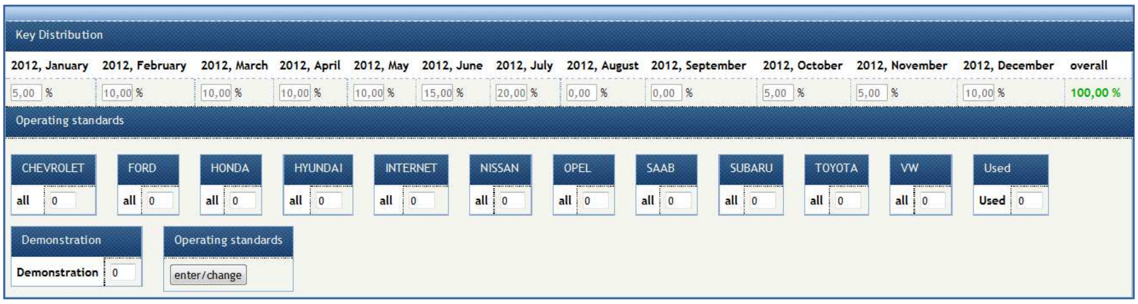


Fig. 12.23: Business targets

The entered business targets will be distributed to the selected period via the distribution index.

12.1.4.5 Sales target - Evaluation

The sales target reporting under *Action / Sales target reporting* compares sales results for one or more users with sales targets, indexed by brand and type model. If necessary, sales results and sales targets are confronted.

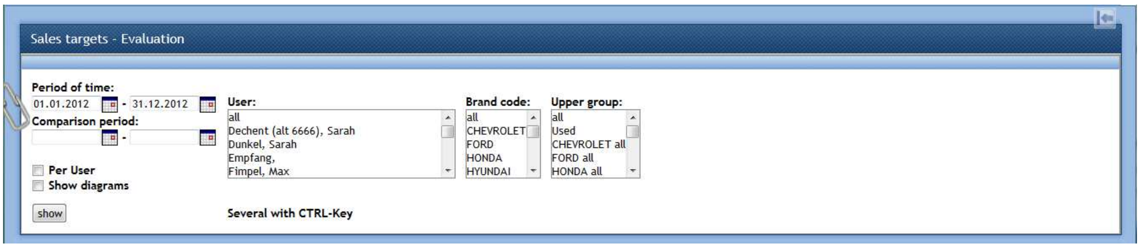


Fig. 12.24: Sales target - Evaluation

Period:	provides the period for the sales targets considered
Comparison period:	results for the periods considered are confronted to this period
by user:	results are represented in a tabular form for each selected user
Diagrams show:	controls the percentage chart display
User:	user to be considered in reporting (or *all*)
Brand code:	show only sales targets for this brand (or *all*)
Upper group:	show only sales targets for these models (or all)

In the aggregated report, the cross-model, cross-brand target achievement of each user is evaluated. *ACTUALS* provide the sales results and *TARGETS* the sales targets. Right below, you can find the business target achievement details.

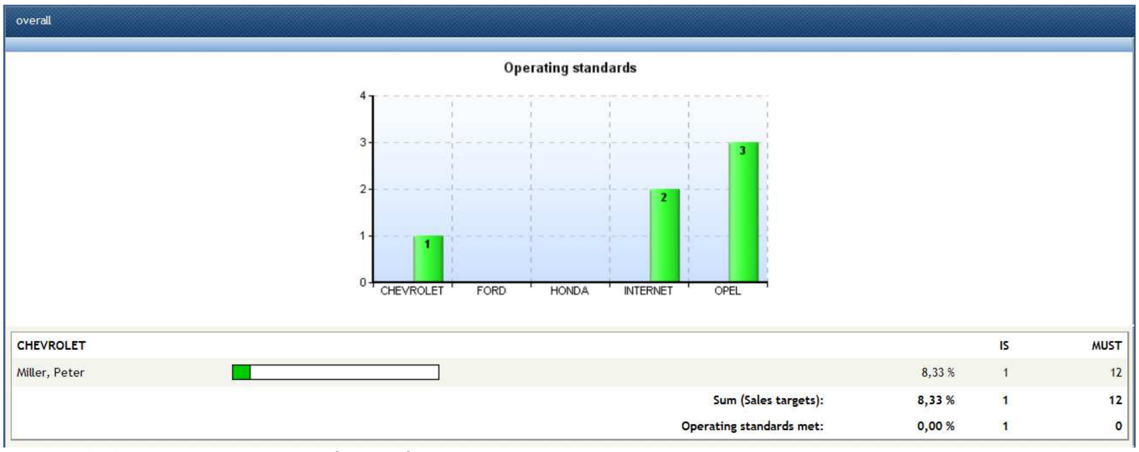


Fig. 12.25: Aggregated results

Under their graphical comparison, you can find a table listing the achievement of individual employees for particular type-models.

If the box *Display chart* is checked, a pie chart is shown under the table to reflect the user's share in the aggregated actual and target values.

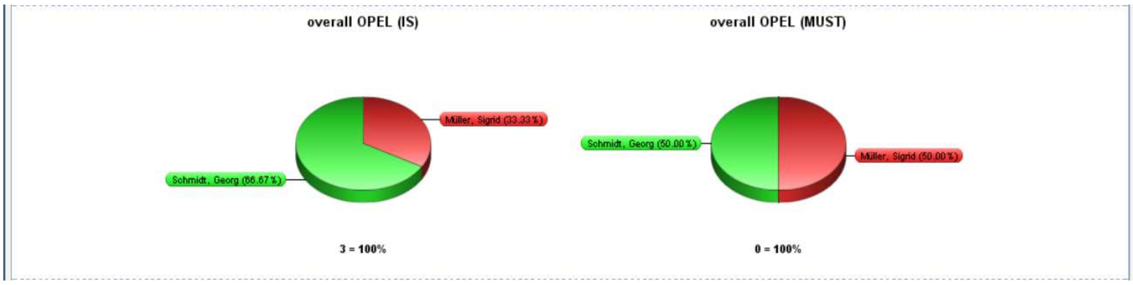


Fig. 12.26: Aggregated results – Chart

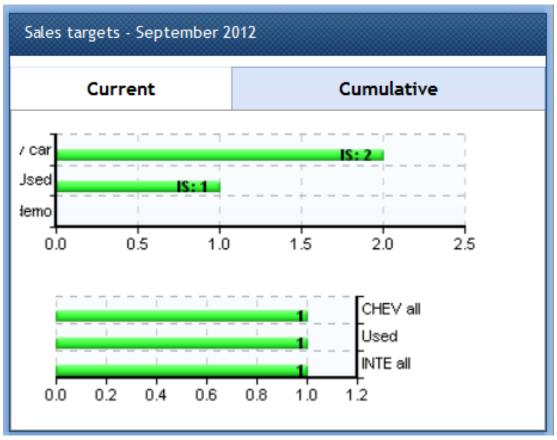


Fig. 12.27: Sales targets in the PIM

If employees have been assigned sales targets, they can view their own ACTUALS-TARGETS comparison in the PIM. This setting is defined under Personal settings.

The PIM shows the sales figures for the current month. Click on the tab *Cumulative* to insert the ACTUAL-TARGET values for the current calendar year.

12.2 Business reporting

12.2.1 ABC analysis

ABC analysis can be found under the corresponding menu item *Action / ABC analysis*. Top clients can be displayed according to their business unit.


Statistics on top customers

Client: overall ok

	new car			used car			Garage			Partbuy		
Time period	5 years			5 years			3 years			1 Year		
Customer type	Purchases/visits	turnover	customers	Purchases/visits	turnover	customers	Purchases/visits	turnover	customers	Purchases/visits	turnover	customers
A-Grade customers (44)	481	8.733.388,68	32	191	650.920,00	12	134	40.273,77	1	0	0,00	0
B-Grade customers (184)	319	6.009.344,55	132	111	1.064.576,89	52	6	154,21	1	0	0,00	0
C-Grade customers (1749)	1295	21.965.735,97	1228	521	5.873.991,77	521	73	30.658,51	29	0	0,00	0
misc. (21171)	120	2.665.902,23	19779	0	0,00	20586	538	163.340,83	21140	0	0,00	21171
top lists	A-Grade customers F / A-Grade customers P B-Grade customers F / B-Grade customers P C-Grade customers F / C-Grade customers P misc. F / misc. P			A-Grade customers B-Grade customers C-Grade customers misc.			A-Grade customers F / A-Grade customers P B-Grade customers F / B-Grade customers P C-Grade customers F / C-Grade customers P misc. F / misc. P			A-Grade customers B-Grade customers C-Grade customers misc.		

Fig. 12.28: ABC analysis

Click on any top customer to open a window with detailed customer information such as sales and visits per business unit.

The ABC customers calculation criteria can be changed under the menu item *Administration / ABC settings*. Therefore, the calculation takes place at night.

12.2.2 Early warning system

The early warning system identifies all customers whose visits in the last quarter were below the historical average. The average value and the statistic deviation (min values as red row) are also shown in the statistic chart of the tab *Statistics* of the customer. In case customer visits fall again in the current quarter, this will be shown with a red exclamation mark.


Early-warning system (81 Clients below min. value) - not choosen ok

Customer	Seller	visits 2/2012	min. value	percent under min. value	New/ Quarter	last contact	finished	Notice
[illegible] (1002374) - Opel, - Opel	Miller, Peter	23	29,55	22,16 %		14.05.2009	!	
1003104 (1003104) 00HB - Opel	,	0	12,54	100,00 %			!	
[illegible] (10255) 4711 - Opel	Haus, Michael	1	1,81	44,64 %		06.08.2009	!	

Fig. 12.29: Early warning system

The list can be internally processed as a to-do-list. If you mark the customer as complete, the list can be sorted accordingly and all pending customers will move upwards. Similarly, a comment can be entered.

12.2.3 Repeat rate

The repeat rate represents customers with repeat purchases in different periods - e.g., with invoices in consecutive periods.

12.2.3.1 Settings

The first section is used to configure periods and cycles and allows excluding blocked customers and customers with an active advertising block from reporting. The selection fields *Start* and *End* of the quarter refer the first day of the first month and to the last day of the last month respectively.

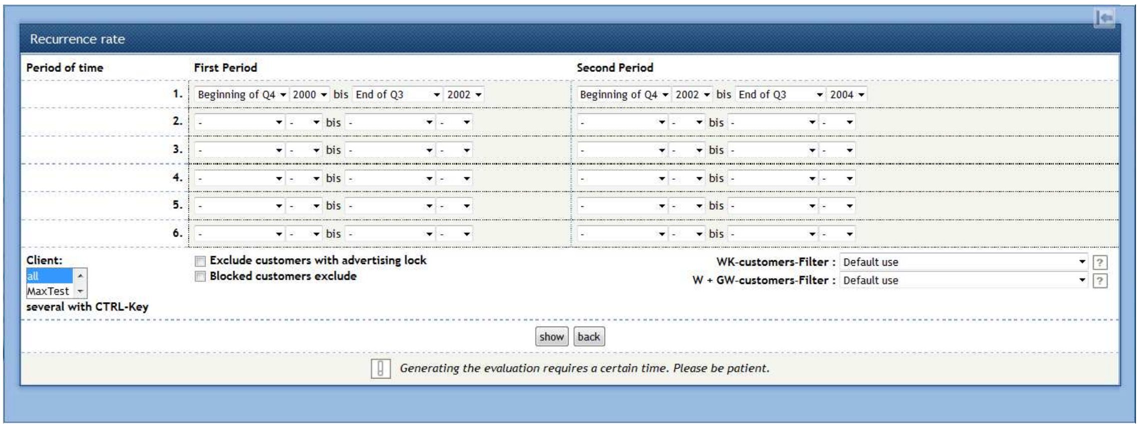
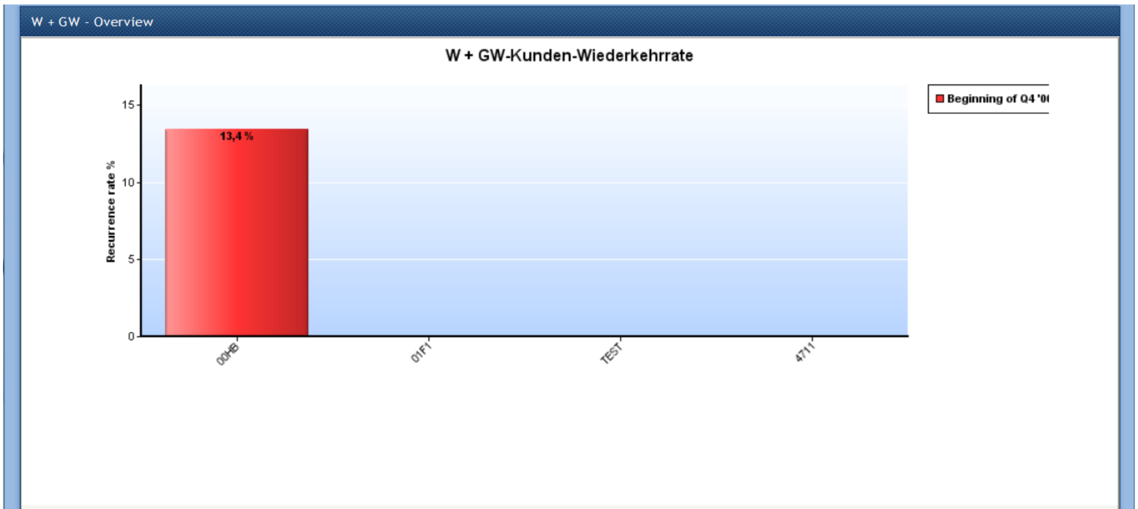


Fig. 12.30: Repeat rate - Settings

Users may assume the default settings for target group selection. Access the relevant criteria to that end through the question mark in the hover field. Alternatively, you may use a customized filter, which can be found in the selection filter.

12.2.3.2 Report

The report is divided into a recurring workshop orders section and vehicle sales section. In each case, a graph and table broken down by client and storage location are created.



Client	Beginning of Q4 2000 bis End of Q3 2002	
	% Returner First Period	% Returner Second Period
Opel	**13,4 %**	**6,2 %**
00HB	13,4 %	6,2 %
01F1	0,0 %	0,0 %

Fig. 12.31: Repeat rate

Under the chart, you can find an overview with the period details. This contains repeat buyers information in absolute value and percentage.

W + GW - Details

Beginning of Q4 2000 - End of Q3 2004

Client	Count customers 01.10.00 to 30.09.02	of it Count customers 01.10.02 to 30.09.04	Count customers 01.10.02 to 30.09.04	% Returner		% Not-Returner	
				First Period	Second Period	First Period	Second Period
Opel	**537**	**72**	**1153**	**13,4 %**	**6,2 %**	**86,6 %**	**93,8 %**
00HB	537	72	1153	13,4 %	6,2 %	86,6 %	93,8 %
01F1	0	0	0	0,0 %	0,0 %	100,0 %	100,0 %
TEST	0	0	0	0,0 %	0,0 %	100,0 %	100,0 %
4711	0	0	0	0,0 %	0,0 %	100,0 %	100,0 %
MaxTest	**0**	**0**	**0**	**0,0 %**	**0,0 %**	**100,0 %**	**100,0 %**

Fig. 12.32: Repeat rate - Table

The absolute count column displays the corresponding customer count in the appropriate period. The column *Of this customer count* contains those customers who were also in the Company during the first period.

The columns *% Repeat buyers* and *% Non-repeat buyers* display the percentage of the second cycle in comparison to the first one (column *1 Period*) and the share of the second cycle on the total customer count in the second period (column *2 Cycle*).

12.2.4 Vehicle statistics

Vehicle statistics shows the count of CRM vehicles invoiced within the last year and the last five years. If you move your mouse over the vehicle count, its age distribution is superimposed. To use this index, you must enter the first registration date for the vehicle.

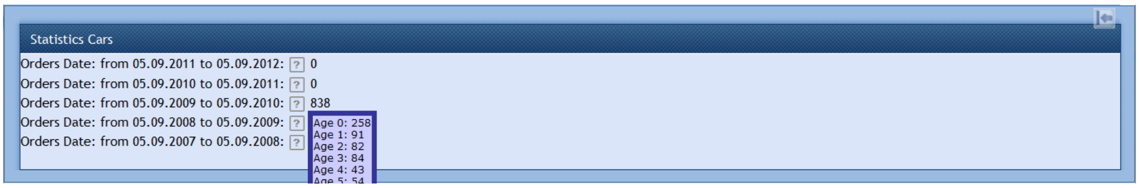


Fig. 12.33: Vehicle statistics

12.2.5 Sales / Postal code analysis

If configured, this menu item provides three different reports: Sales by business area (date range-selectable), pie chart with postal code customers breakdown, and sold vehicles statistics.

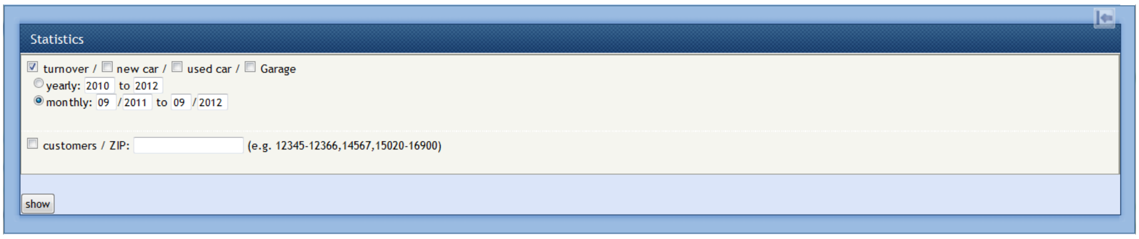


Fig. 12.34: Sales / Postal code analysis

12.3 Marketing

12.3.1 Marketing analysis

Marketing analysis compares the results of multiple filters that are evaluated repeatedly at selected time intervals over a given period.

Marketing analysis has its own marketing administrator and reporting area.

12.3.1.1 Settings

You can create a new report in the upper section of the administration area under the menu item *Management / Marketing analysis settings*. All reports created to date appear underneath.

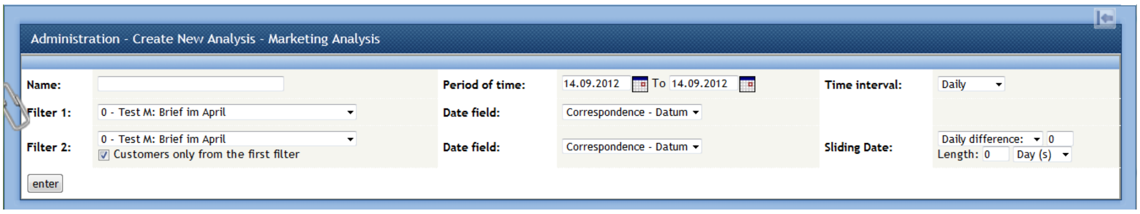


Fig. 12.35: Marketing analysis - Settings

To create a new report, you must enter the following report parameters in the corresponding entry form of the upper section:

Name:	Report name
Period:	Start and end dates of reported period
Time interval:	Interval at which the filter data is collected in the period and are shown in the report
X Filter:	Settings for the previously created filters that must be evaluated

- Date field:

  Meaningful data requires a relevant field in the list view of the filter, which allows performing filtering at different time intervals (e.g., invoice date, correspondence date)

- sliding date:

  additional days from the specified date of the time interval

display only customers from the first filter:

if the box is checked, the second funnel includes only customers that are also present in the first filter (funnels). If the box is not checked, then both filters contain different customers

You can find all previously created reports under the entry form. In addition, this provides a checkbox to indicate whether this report is to be deleted from the database during the next save operation.

12.3.1.2 Report

Go to *Action / Marketing analysis* to select any existing report. Results are presented in both graphical and tabular form.

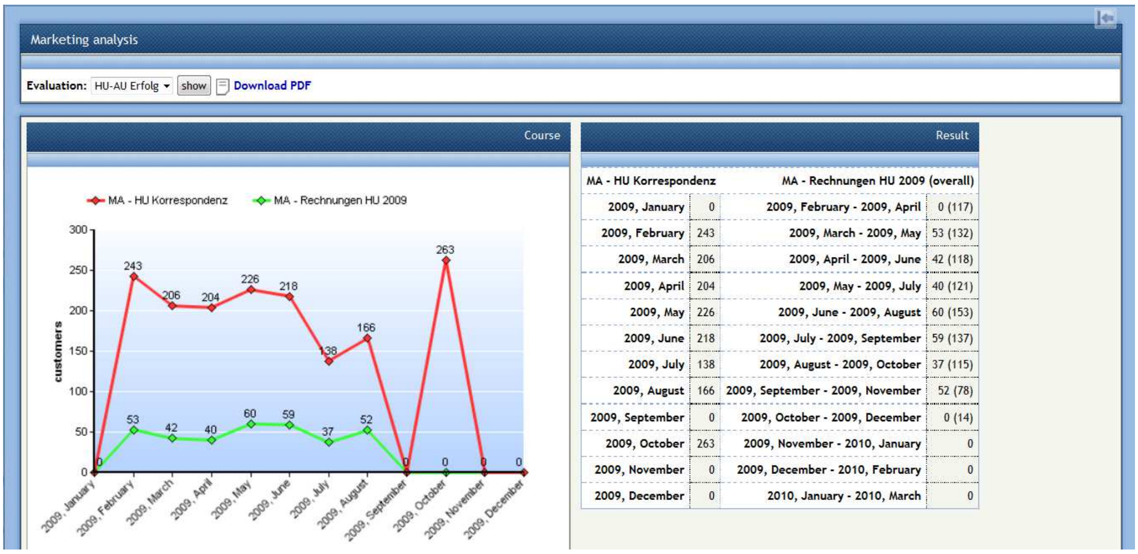


Fig. 12.36: Marketing reporting

The columns show the period results whereas the name considers the sliding date. Moreover, the number in brackets displays the unfiltered results count (if the settings so specify).

12.3.1.3 Marketing analysis of the sample HU-letter

Customers who receive an HU invitation in the month X and customers who receive an invoice one month after the invitation should be compared. In doing so, the invitation letters success is effectively evaluated against an ideal case.

The following steps are necessary:

a) Creating the filter

   a. Customers who received an HU Invitation

   b. Customers who received a corresponding invoice

b) Creating the report

   a. Filter 1: Customers with invitation
   b. Filter 2: Customers with invoices
   c. Time interval: monthly
   d. Sliding date: Letter submission and billing occur with a month difference. This date shift must be compensated in the reporting settings through the sliding date in filter 2.

      Here, the month difference is equal to -1 and the length is equal to 1 month

In this report, it is key to check the box *Display only customers from the first filter*, so that only customers appearing on both filters are counted.

12.3.2 Marketing calendar

The marketing calendar displays an overview of all current campaigns in the selected period and their associated contacts. Moreover, you can display additional calendars and thus obtain an overview of the existing appointments.

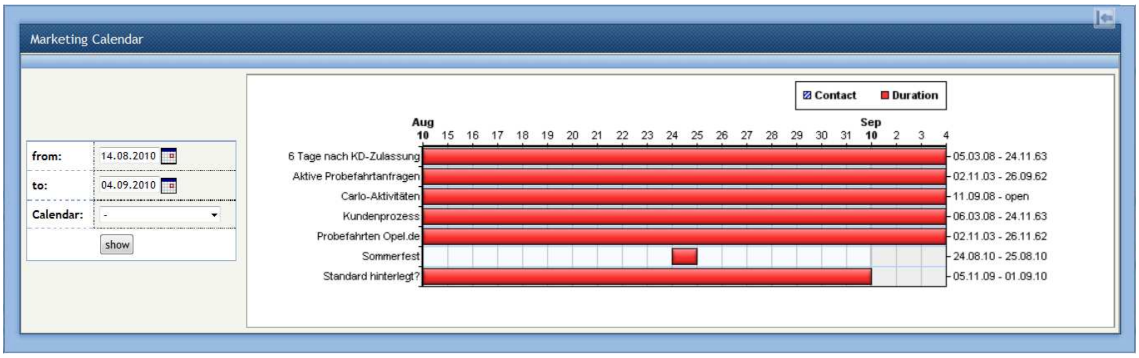


Fig. 12.37: Marketing calendar

12.3.3 Sales funnel

A sales funnel is used to gradually reduce a customer set to a manageable number, like a funnel or sieve.

12.3.3.1 Creating a funnel

Go to the menu item *Management / Funnel filter* to create a sales funnel. The name must be entered. The date indicates the entry date. You can define up to six steps over the previously completed filter to gradually reduce the amount of customer data. After clicking on *Add new*, the funnel is created.

Information texts can be stored for existing funnels, which will be displayed on funnels and individual steps afterwards. Click on the red X to delete a funnel.

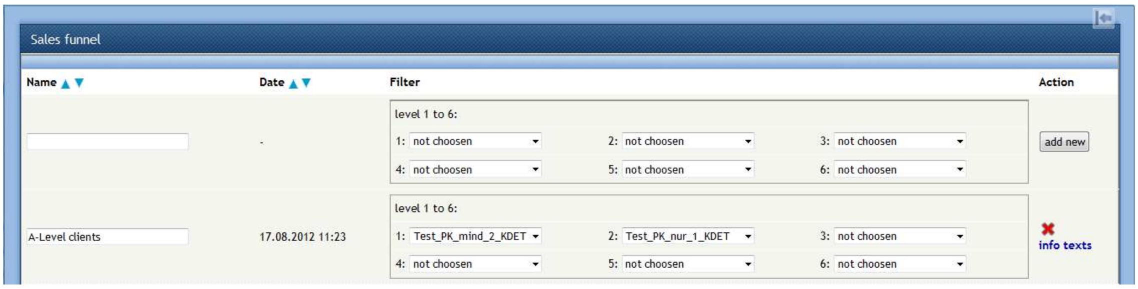


Fig. 12.38: Creating funnels

12.3.3.2 Displaying funnels

Existing funnels are displayed under the menu item *Action / Sales funnel*. Here, all funnels are available for selection. Make your selection and click on *OK* to view the funnel of interest. In addition, one or more managers can be selected and their individual values are shown next to the totals; the master data manager is the determining field.

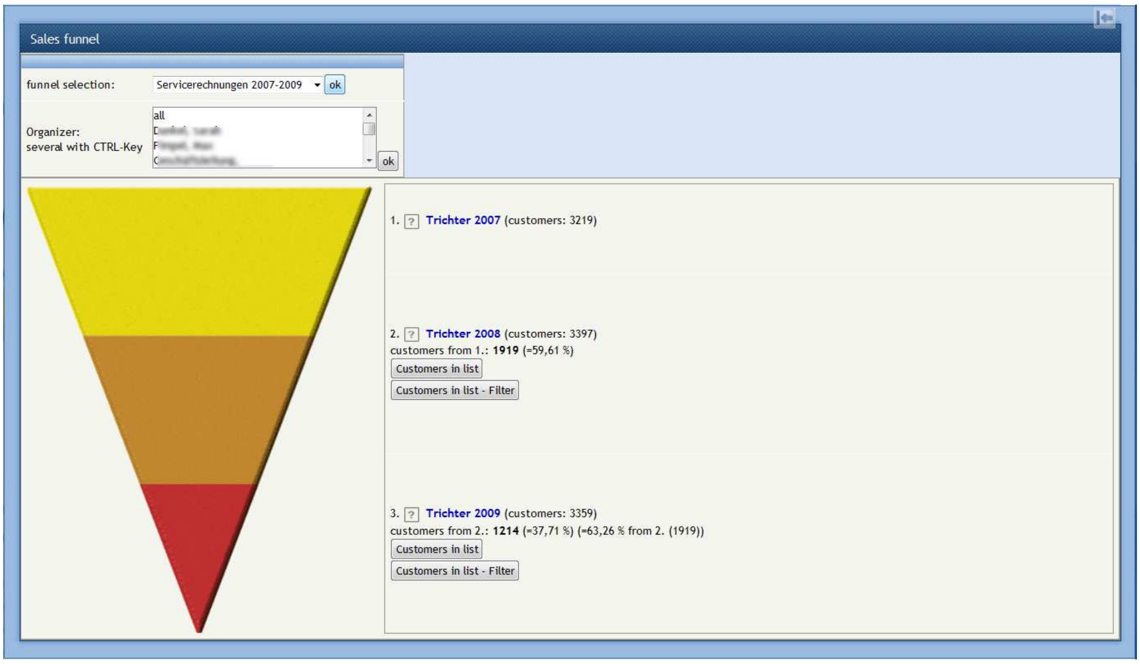


Fig. 12.39: Sales funnel

Next to the funnel graphic, a set of figures provide information on the customer count for each stage. Click on the filter name to access the list view with the selected customers of this filter. If you want to see only filtered customers, you must click on the button *Customers in list*. Here, the default table header in your personal settings will be used. If you want to display the table header of the corresponding filter, you must use *Customers in list - Filter*.

12.4 Complaint

12.4.1 Complaints report

The Complaints report is divided into three sections:

The upper report section contains report criteria.

The middle section contains both a tabular and a graphical report when selected.

At the bottom of the page, you can view the customers whose complaints meet the filter criteria, provided the box *Display list of complaints* is checked.

12.4.1.1 Report criteria

To obtain a clearer report, it is advisable to use certain filter criteria.

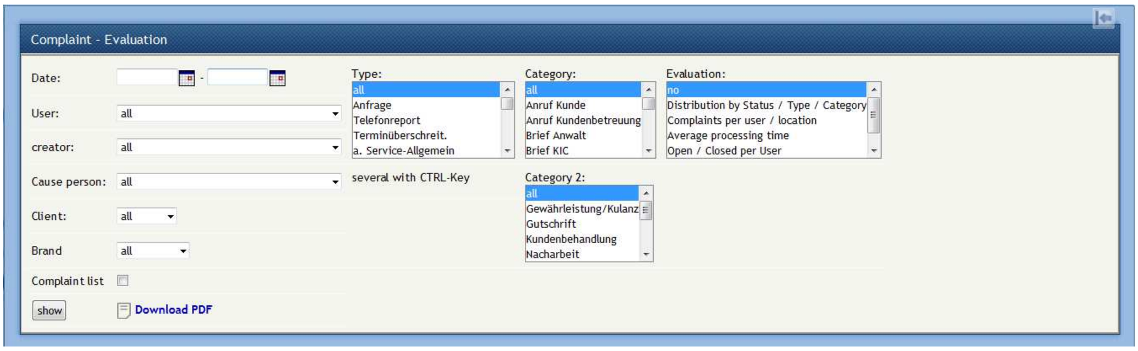


Fig. 12.40: Complaint Report - Criteria

Date:	period to be considered:
User:	the currently responsible employee
Creator:	the employee who created the complaint
Cause person:	the employee, through which the complaint arose
Client:	depending on the installation, the master data client or the complaint's client
Brand:	Vehicle make, if a vehicle reference is entered upon complaint creation

Type / Category / Category 2 / Evaluation:

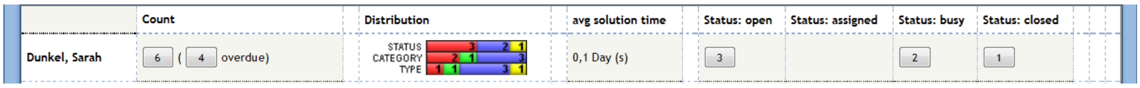
Display and selection of the labels that have been previously stored in CRM settings

Complaint list: Selection of graphic reports

12.4.1.2 Report

The desired condition graphics are displayed in the middle section after clicking on *show*.

Underneath there is a tabular presentation of the complaints on the above specified conditions. Under the user report, there is a complaint table by causal agent or origin.



	Count	Distribution	avg solution time	Status: open	Status: assigned	Status: busy	Status: closed
Dunkel, Sarah	6 (4 overdue)	STATUS CATEGORY TYPE	0,1 Day (s)	3		2	1

Fig. 12.41: Complaint Report - Table

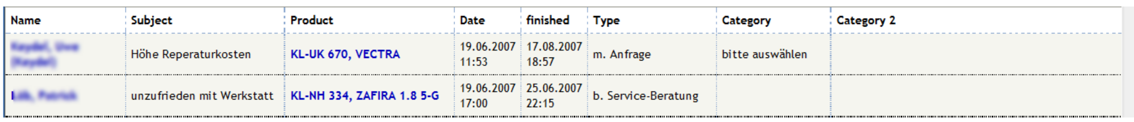
For each user, the *Count* field displays all complaints as well as those overdue. Overdue is defined as an excess over the target time provided during complaint entry. Click on the appropriate button to list the underlying complaints. These can be treated as a normal filter, so that the export , mail-merge, and follow-up campaign functions are available.

The column Distribution shows the number of the corresponding types and categories. Further information is shown as you hover over the field.

In addition to the *Average resolution time*, you can see all *Statuses* and, if selected under the conditions, the *types* and *categories* with the number of existing customers. Click on the button to access the appropriate filter list.

12.4.1.3 Results

If the box *Complaint list* is checked, all customers meeting the complaint criteria will be listed.



Name	Subject	Product	Date	finished	Type	Category	Category 2
[illegible]	Höhe Reperaturkosten	KL-UK 670, VECTRA	19.06.2007 11:53	17.08.2007 18:57	m. Anfrage	bitte auswählen	
[illegible]	unzufrieden mit Werkstatt	KL-NH 334, ZAFIRA 1.8 5-G	19.06.2007 17:00	25.06.2007 22:15	b. Service-Beratung		

Fig. 12.42: Complaints Report - Results list

12.4.2 Complaints List

Use the overview list for an overview of all complaints created. Use the filters therein to sort individual complaints by status.

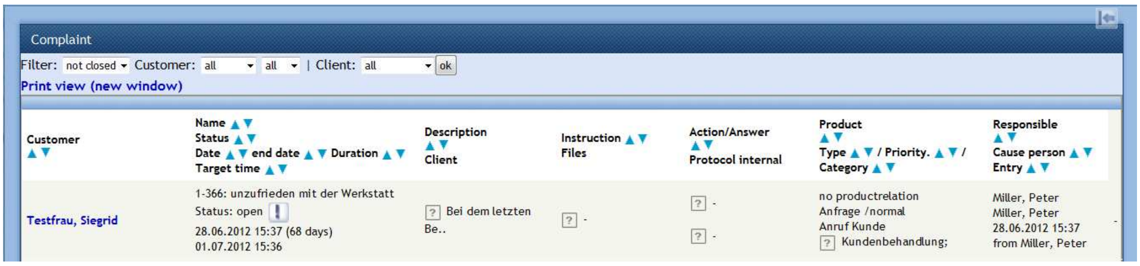


Fig. 12.43: Complaints list

12.5 User

12.5.1 Login statistics

Login statistics indicates how many users and how often have users logged in within the period specified in the system. This period is introduced in the header with two *Date fields*.

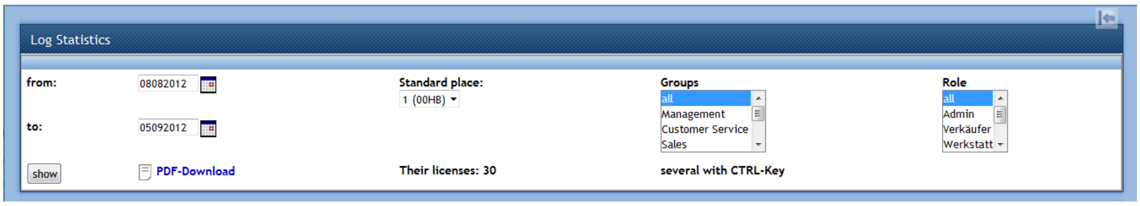


Fig. 12.44: Login statistics

For greater clarity, search results can be further filtered using the *default storage location* (entered in User management), *Group*, and *Role*.

All countable login data are presented in both graphical and tabular form. Among the representations of *Usage time by group*, *Roles*, as well as *Usage time by group per day*, and *Roles per day*, you can find *Customer count* tables where all logged-in users per day are shown. The login time for each *User per day* is also displayed.

Incomplete login information will be summarized at the end of the report. This includes, for example, users who have not logged out of the system properly.

12.5.2 User logins

In the menu item *Action / User logins*, all users with their last login date and total login count are shown in tabular form.

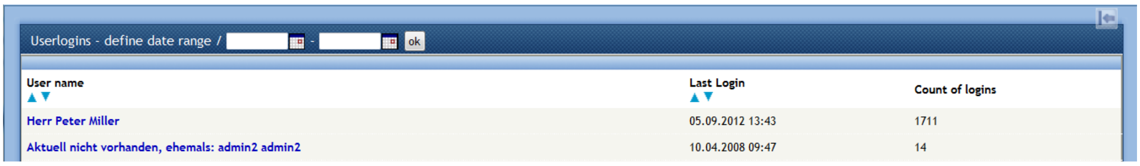


Fig. 12.45: User logins

You may obtain a better view by limiting the login period.

12.5.3 Activities report

Under *Action / Activity report* you can review the employee's work. Enter the period under review and check the results.

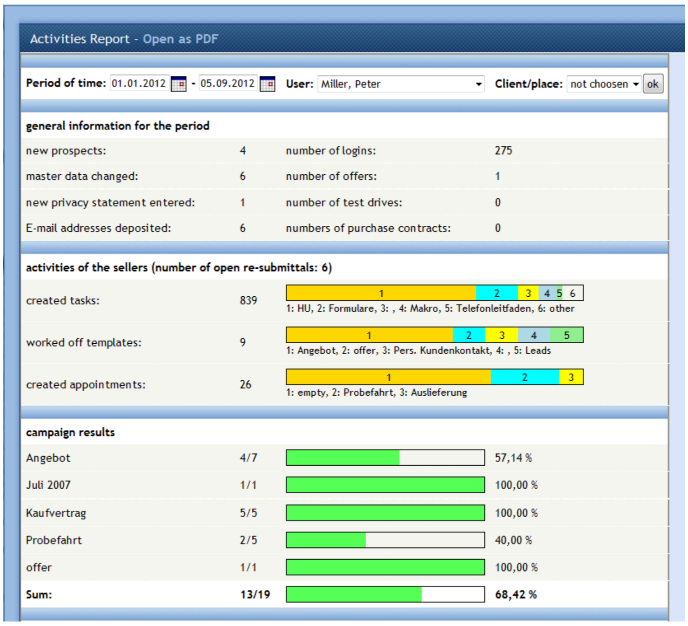


Fig. 12.46: Activities report

General Information:	Number of created prospects, offers made, test drives, sales agreements, etc.
Salesperson activities:	
Created tasks:	All tasks this employee has created (Correspondence manager) regardless of for whom
Processed follow-ups:	All follow-ups the employee has processed during the period, regardless of whether he/she is the manager
Created appointments:	All appointments the employee has created
Campaign results:	All entries on this campaign, including any follow-up activities; the number may be different from that in general information
Lead results:	Number of distributed and processed leads
Customer analysis:	Number of customers under the displayed criteria
Weekly report:	Number of the salesperson activities within the last week of the selected period per day

12.6 Other

12.6.1 Modular graph

The modular graph provides several chart types for the presentation of statements. In this respect, the following considerations can be made:

- Which statement must be supported with the chart, or which statement is expected / presumed?
- What else must be stated or examined? In essence, the statement will always be a comparison - with the chart toolkit providing structure, ranking, time series, and frequency distributions.
- Which chart is chosen for the comparison type?

12.6.1.1 Creating filters

The modular graph requires one or several filters as it should filter the results using the filter conditions as much as possible. In fact, all charts must be built and delivered on filter results. Among other things, this is for clarity reasons but it is also advised that copy only mandatory data into the filter results. On the other hand, there is no other mechanism to select a given date/invoice range.

For the chart data to appear in the correct order and scale (e.g., postal code by size, date: January, February, March ...), the corresponding values in the results list of the Filter Wizard must be presented in ascending / descending order.

12.6.1.2 Charting

Under the menu item *Management / Modular graph*, a new chart is created or an existing one modified.

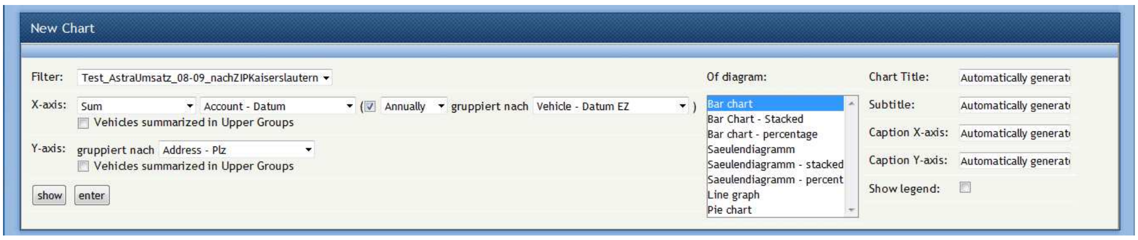


Fig. 12.47: Modular graph - Settings

Filter: Adoption of previously created filter

X-axis:

- Function: Choice between count, sum, maximum, minimum and average
- List field: Display of the fields from the list view of the filter (unless it has been previously selected in function *Number of customers*)
- Period: Choose between daily, weekly, annual and other views if a date field has been previously selected during grouping.
- Grouped into: Comparison of several chart results

Y-axis: Determination of the comparison field

Chart type: Selection of the chart type

Name:

- Chart title: Saved chart name
- Subtitle: Display under the title (by default shows the creation date)
- Name: Possibility of changing the axis label (by default assumes the selected values)

Legend: Legend text

Click on *Show* to open the chart and the data table. After initial creation and each change, the chart must be saved by clicking on *Enter*.

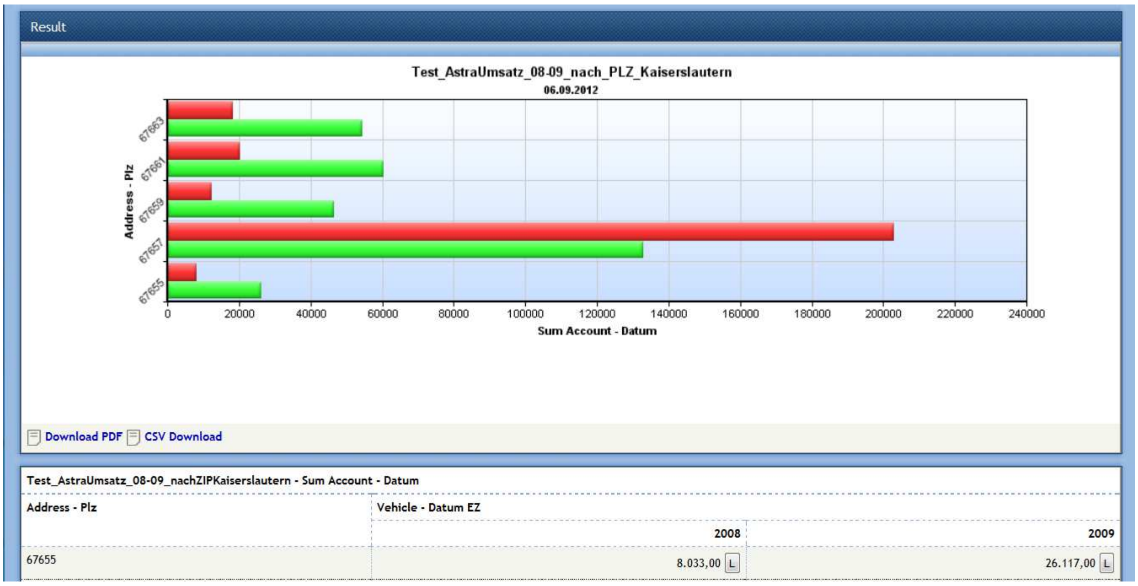


Fig. 12.48: Charting toolkit - Results

Results can be exported in two different ways:

By clicking on *PDF download*, the data table is exported alongside the chart; by clicking on *Download CSV*, data can be further processed. If you click on the buttons in the results table, the list view is opened showing the corresponding customer records.

12.6.1.3 Chart management

Chart management displays all saved charts and their title, and corresponding filters.

Fig. 12.49: Chart toolkit - Management

Here, charts can be copied and removed. Click on *Create your own menu item* to make the charts visible to other employees. After activation of the menu item in CRM administration, approved users can find the corresponding chart in *Action / Charts*.

To change an existing chart, click on the blue chart title. Filter-dependent data (e.g., invoice date, type model) can only be adjusted by changing the corresponding filter.

12.6.2 Self-potential report

This report serves sales persons to assess their customers' potential.

Maintaining vehicle data under vehicle management in the area of administration is necessary for an accurate representation of the number of vehicles.

12.6.2.1 Settings

In the upper section, you can define certain result restrictions.

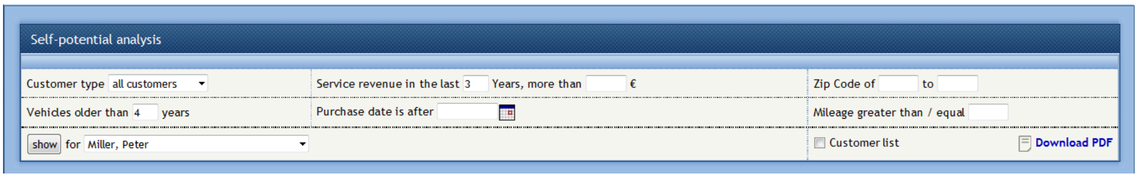


Fig. 12.50: Self-potential report - Settings

Customer type:	Distinction between private and corporate clients and Display all records
Service revenue:	Period and total sales for the service business considered
Zip code:	Postcode district from the customer`s master data
Vehicles:	Reference to the initial registration date of the customer-assigned vehicle
Date of purchase:	Customer approval
Mileage:	the last vehicle mileage data
Customer list:	Display the corresponding list of customers below the graphics

Only the sales person's own data are available. Conversely, administrators can create reports for all employees.

12.6.2.2 Report

Two images are displayed in the report settings:

- Age of customer vehicles under their care
- Customer vehicle makes under their care.

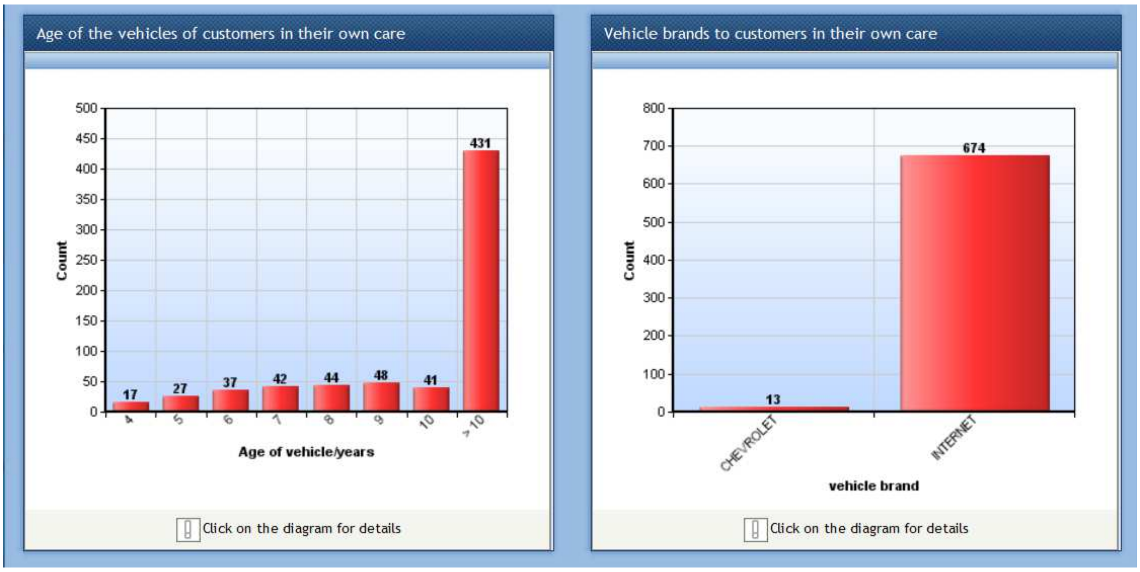


Fig. 12.51: Self-potential report - Charts

Click on a selected bar to display the vehicles percentage.

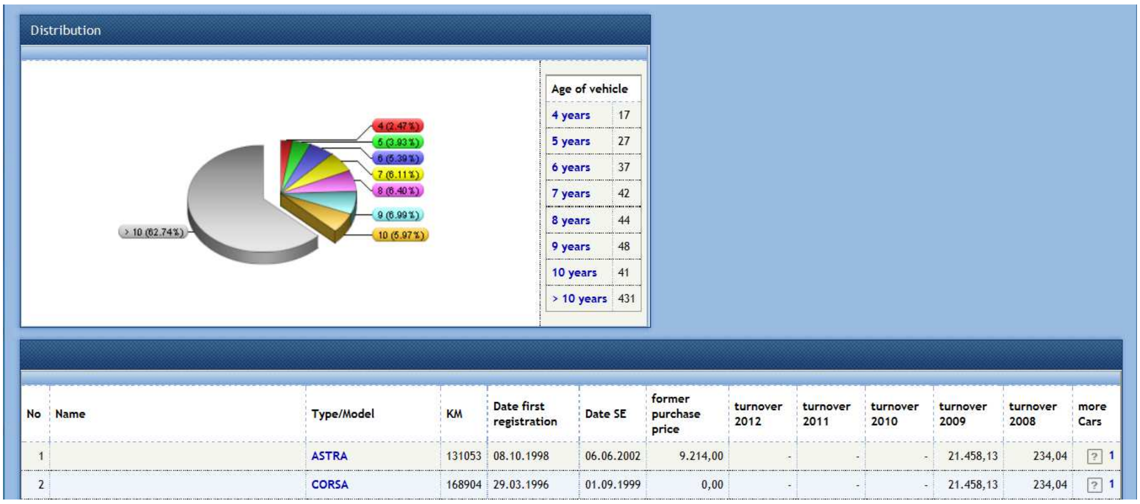


Fig. 12.52: Self-potential report - Breakdown

In addition to the information on the linked vehicle, cross-vehicle customer sales and a link to other vehicles outside the report criteria is displayed.

12.6.3 District statistics

If configured, this report shows all customers grouped by municipality code in the menu item *Action / District statistics.*

Fig. 12.53: District statistics

The customer number with the area is listed in descending order in tabular form. Clicking on Count takes you to the list view with the selected customers.

12.7 Call Center

12.7.1 Scripts-Basic report

In the Script-Report under the menu item *Action / Call Center Reports / Basic analysis* you can sort by Script, Client, User (or User group) and / or Date, and view the number of answered questions.

Fig. 12.54: CC - Basic report - Settings

Move your mouse over the individual questions to view the answers distribution.

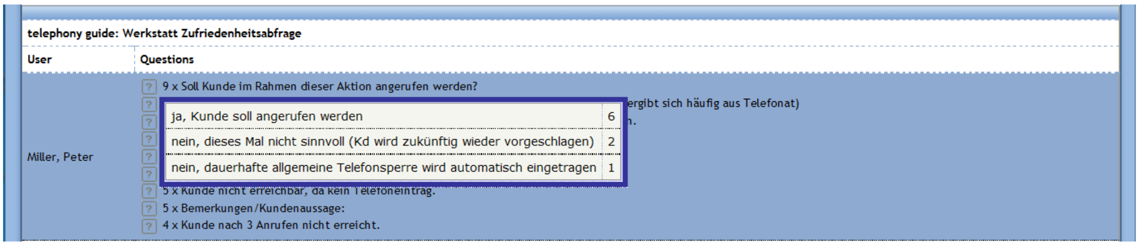
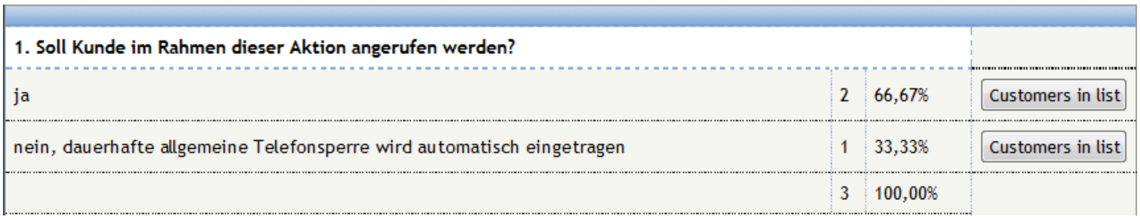


Fig. 12.55: CC-Base report

All script questions are listed and the percentage answered displayed.



1. Soll Kunde im Rahmen dieser Aktion angerufen werden?			
ja	2	66,67%	Customers in list
nein, dauerhafte allgemeine Telefonsperre wird automatisch eingetragen	1	33,33%	Customers in list
	3	100,00%	

Fig. 12.56: CC-Basic report - Results list

Click on *Customer in list* to display the corresponding records in the list view, which can be further processed from there.

12.7.2 Scripts-Follow-up

This report lists all follow-ups generated in the call center. Go to menu item *Action / Call Center Reports / Scripts-Follow-up*, to view a list of follow-ups and edit them.

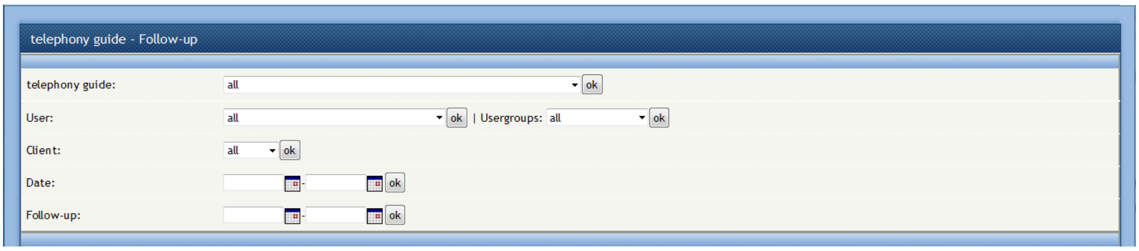


Fig. 12.57: Scripts - Follow-ups - Settings

Besides the *Script name*, *User/User group* and *Client*, results can be further restricted by *Date*. Here, it will be distinguished by creation date (*Date*) and the date on which the reminder must be activated (*Follow-up date*).

Click on *Ok* to show the results.

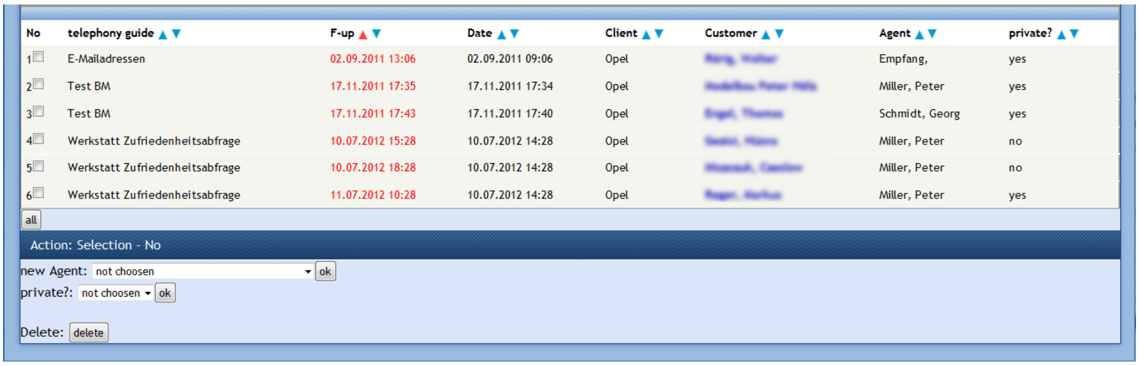


Fig. 12.58: Scripts - Follow-up - Results list

This list contains the *Script name*, *Follow-up date*, *Creation time*, *assigned Client*, as well as the *User* who created the follow-up and whether this is of *Private* nature. If the latter is true, this follow-up appears only on this employee as he/she logs into the call center.

If you check the flag in the first column next to the script, three actions appear:

- Change the current call center agent *(New agent)*
- Choose between a private and non-private follow-up *(private?)*
- Delete a follow-up *(Delete)*.

12.7.3 Scripts-Statistics

Scripts statistics are divided into three sections:

- In the upper section, you choose the appropriate criteria for the various reports.

- Click on the upper section (*Aggregated scripts report*) to obtain a fully printable report. Here, any question in the selected scripts is considered in detail.

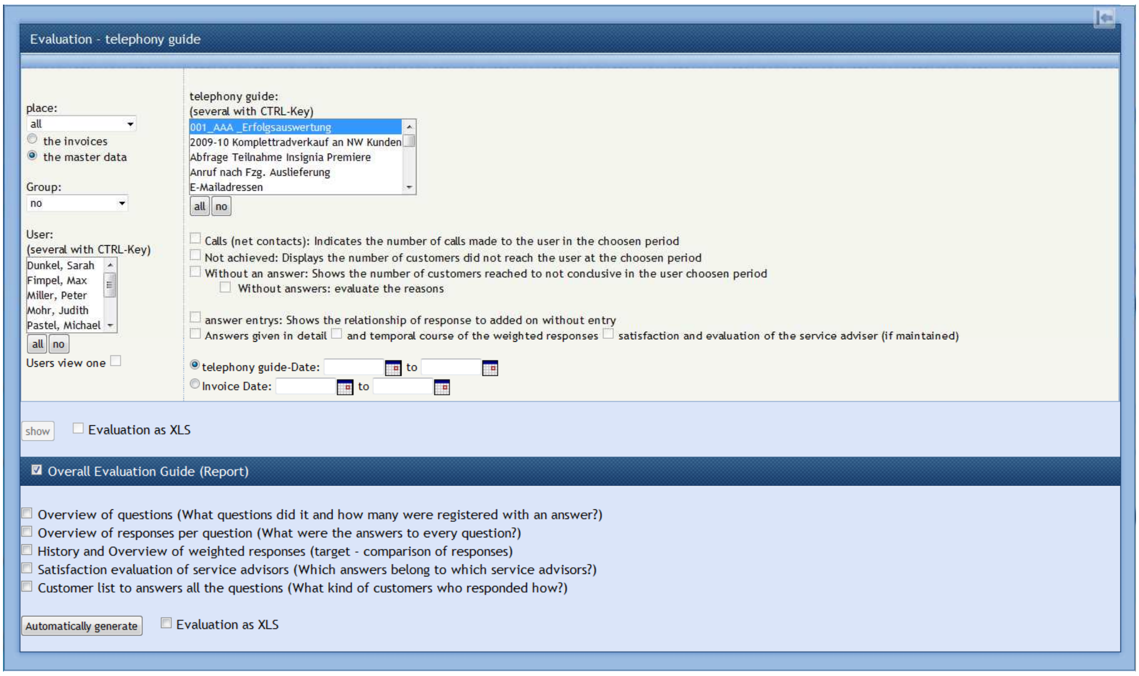


Fig. 12.59: Script -Statistics - Settings

12.7.3.1 Settings

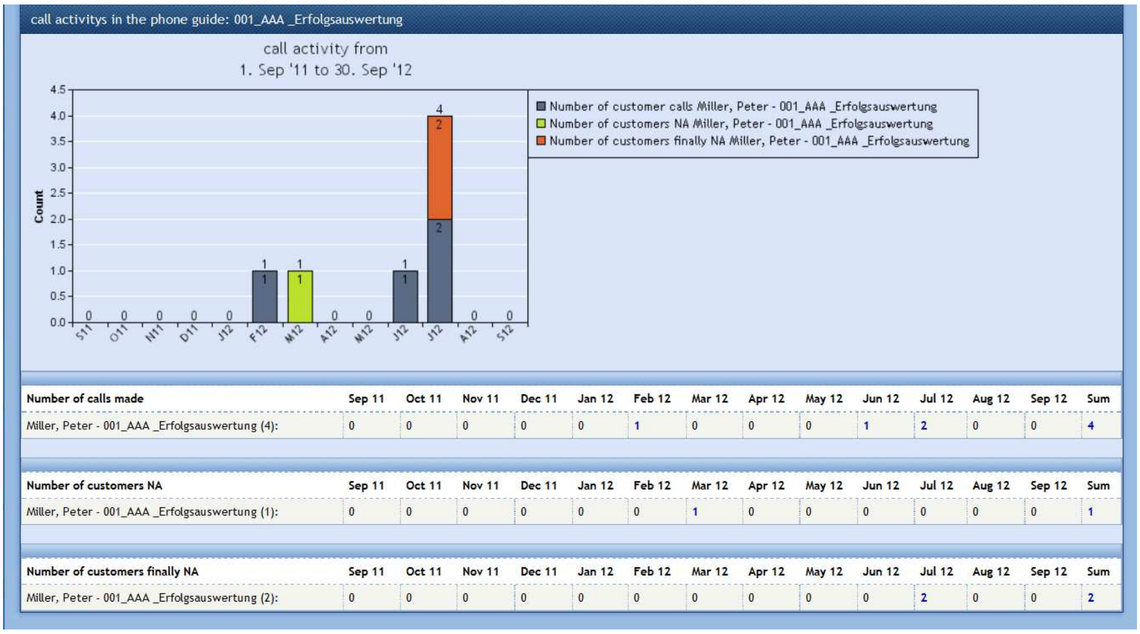
Place:	the storage location for the customer or invoice
Group:	Select a group of users instead of individual employees
User:	Selection of employees to be evaluated
Telephony guide:	Selection of the scripts under evaluation
Calls (net):	corresponds to the number of calls effectively performed by the user. As soon as a response is provided to a calling customer, it is assigned to this statistic
Not achieved:	Total temporary unreachable calls, follow-ups and finally unreachable contacts, in which the comments field holds the number of temporarily and finally unreachable calls. Contacts reached at a later time are automatically removed from this statistic.
Without an answer:	Finally unreachable customers
Reasons:	Display of reasons entered during script creation and later selected reasons

Answer entries:	Number of saved answers
Answers in detail:	Overview of answers to all questions
Time distribution:	time distribution of the answers provided (previously enter weights for the different script questions)
Satisfaction report:	separate listing of the master, service employees, and salespersons

12.7.3.2 Call center agent report

After selecting the script under evaluation or all scripts, enter the period under review. Here, you can only select the call script date. If you choose the invoice date, the user selection is disabled. As described above, you may introduce additional filters.

Click on the button *Display* to generate the graphical representation.



Number of calls made	Sep 11	Oct 11	Nov 11	Dec 11	Jan 12	Feb 12	Mar 12	Apr 12	May 12	Jun 12	Jul 12	Aug 12	Sep 12	Sum
Miller, Peter - 001_AAA _Erfolgsauswertung (4):	0	0	0	0	0	1	0	0	0	1	2	0	0	4

Number of customers NA	Sep 11	Oct 11	Nov 11	Dec 11	Jan 12	Feb 12	Mar 12	Apr 12	May 12	Jun 12	Jul 12	Aug 12	Sep 12	Sum
Miller, Peter - 001_AAA _Erfolgsauswertung (1):	0	0	0	0	0	0	1	0	0	0	0	0	0	1

Number of customers finally NA	Sep 11	Oct 11	Nov 11	Dec 11	Jan 12	Feb 12	Mar 12	Apr 12	May 12	Jun 12	Jul 12	Aug 12	Sep 12	Sum
Miller, Peter - 001_AAA _Erfolgsauswertung (2):	0	0	0	0	0	0	0	0	0	0	2	0	0	2

Fig. 12.60: Scripts Statistics - Graphical report

The graph shows of all calls for the selected users. In addition, tables are generated to provide a data overview.

Depending on the length of the evaluation period, there are different views:

- less than 31 days: Daily report
- from 31 to 700 days: Monthly report
- over 700 days: Yearly report

If, before generating the graph, you select *Consider users individually*, the report will be generated by individual user instead of by user group.

12.7.3.3 Evaluation of customer satisfaction (answer analysis)

For the satisfaction evaluation, it must be decided whether you choose the call script-date (customer call) or the invoice date (customer visit to the Company and satisfaction in retrospect).

If you want to obtain an overview of the answers to all questions, check the box *Detail on provided answers* before or click on the link to the right of the graph.

The second link *Detail on provided answers and Chronological overview of weighted answers* generates, in addition to the summary of answers to all questions, a chronological overview of the weighted answers.

12.7.3.4 Overview of customer satisfaction per service consultant

To assess the individual service and sales employees, you must check the box *Satisfaction evaluation of the service consultants* under the selection criteria.

On the right side, you can view a list of employees whose services have been invoiced during the past year. Here, you can choose individual masters, service employees, salespersons, as well as several or all employees. If you select *None*, no report is generated.

A graph is created as part of the results.

The bars show the target points for each question. Each master has achieved a score per question. In the table, the score is displayed in red if below the corresponding target point and in blue if above or equal to the target point.

12.7.3.5 Aggregated report - Scripts

If you prefer avoiding any settings upon report generation, choose the aggregated report.

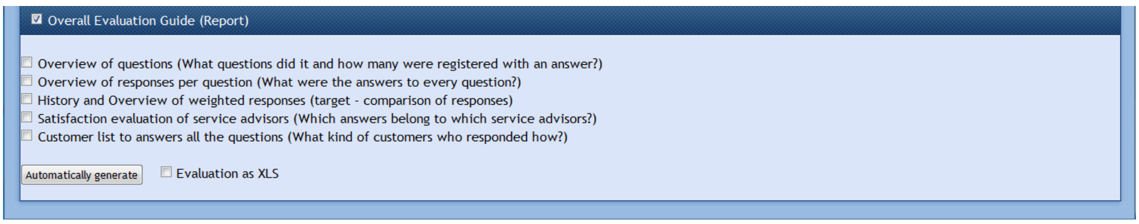


Fig. 12.61: Script statistics - Aggregated report

In this section, the response data is not presented on the screen but passed directly to the print preview, provided the call script date and the corresponding user or user groups have been selected.

Alternatively, the invoice date can selected. If the point *Satisfaction evaluation of service employees* is clicked, the corresponding service consultants / masters must be selected.

The point *List of customers with answers to all questions* generates a list of answers provided for the call script as well as a list of customers providing those answers.

If printable data is generated, a blue link with a timestamp is generated at the bottom of the page. Click to open the print preview in a separate window. There, check the report sections you wish to print. If you create a PDF file, all report sections are checked regardless of whether checked or not.

12.7.4 Scripts-Working hours

The working time report measures the time elapsed between CRM login and logout. Click on the blue-coloured working hours to view a detailed list of working hours per day.

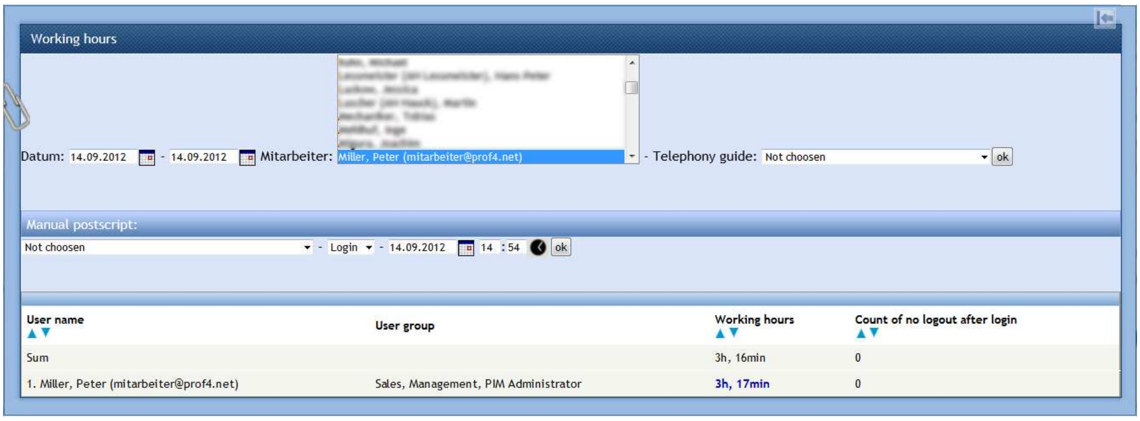


Fig. 12.62: Scripts-Working hours

To add subsequent login or logout times, enter times after employee selection.

12.7.5 Scripts - Results report

The Scripts-Results report is divided into three sections:

- In the upper section, you can enter the corresponding report criteria.
- In the lower section, *Results*, the tabulated results are displayed and a file export option is provided.

12.7.5.1 Settings

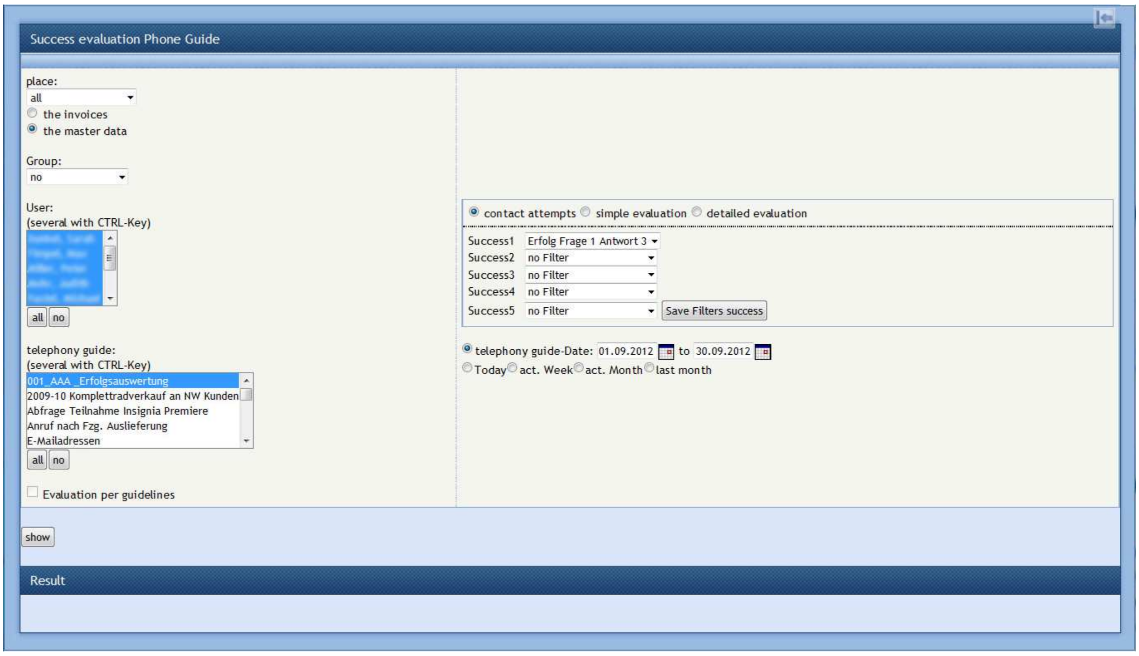
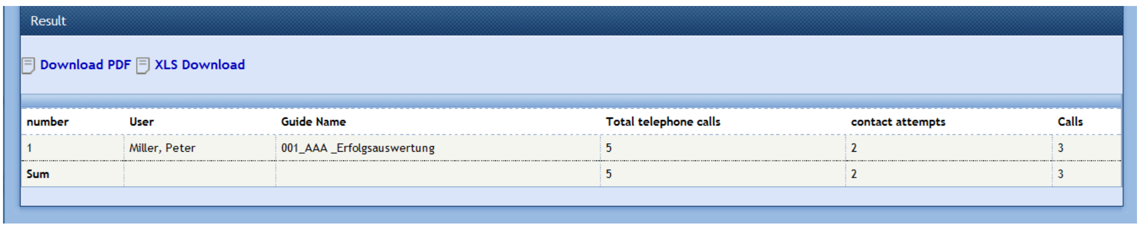


Fig. 12.63: Scripts - Results report - Settings

Place:	Distinguish between storage locations. If inquiring about workshop satisfaction, it is advisable to select the billing storage location to understand how satisfied the customer was with this particular workshop
Group:	Select individual users, several users, or a whole group of users
Telephony guide:	Select the scripts under evaluation. If you select multiple scripts, you can additionally determine whether to use a shared or a separate evaluation for each script *(Report per script)*.

12.7.5.2 Reporting

a) Contact attempts


Result

Download PDF XLS Download

number	User	Guide Name	Total telephone calls	contact attempts	Calls
1	Miller, Peter	001_AAA _Erfolgsauswertung	5	2	3
Sum			5	2	3

Fig. 12.64: Scripts - Results report - Contact attempts

This report summarizes calls as follows:

Total telephone calls: Sum of all contact attempts and calls

Contact attempts: all temporarily unreachable and finally unreachable (no answer) calls, as well as created follow-ups, both still open and closed

Calls: effectively registered answers

b) Simple evaluation

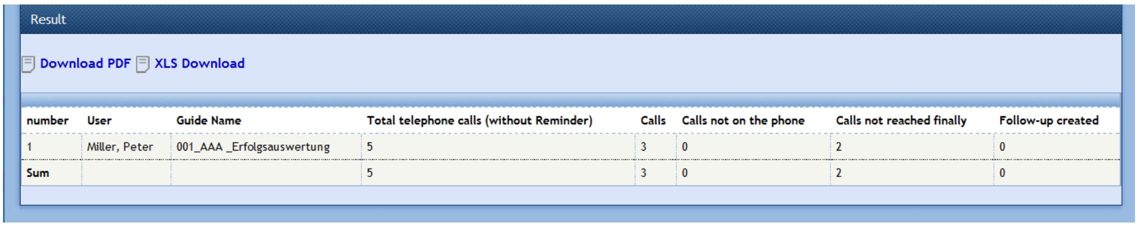


Fig. 12.65: Scripts-Results reports – Simple evaluation

Choose this report if you need a more detailed representation of the calls:

Total telephone call: total of all temporarily unreachable and finally unreachable calls

Calls: effectively registered answers

Calls not on the phone: temporarily unreachable customers

Calls not reached finally: customers set to "no answer"

Follow-up created: currently outstanding follow-ups

c) Detailed report

Fig. 12.66: Scripts-Results reports - Detailed report

Please note that only calls with the selected state will be displayed.

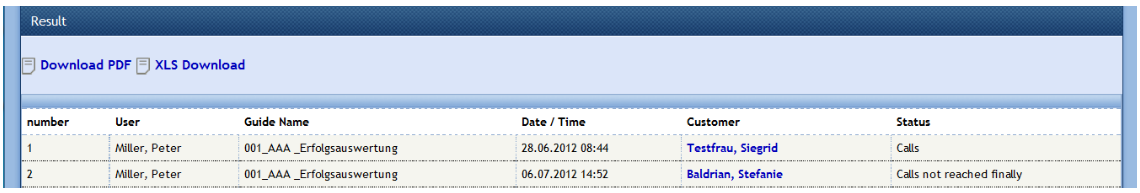


Fig. 12.67: Scripts-Results reports - Detailed report / Results list

In the corresponding result list, the customer name is displayed in addition to the date and exact time of the call. Click on the blue name to access the customer overview.

12.7.5.3 Results filter

Use the results filter to display the number of answers given to certain questions in the report.

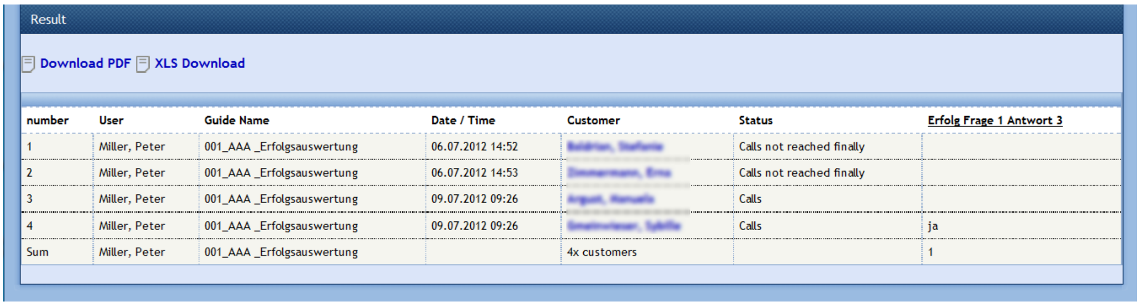
This filter is created previously in the filter wizard. For a filter to be identified as results filter, two conditions must be met:

- Include as filter conditions:
    - the script name,
    - the question,
    - the answer to be counted.
- In the Filter Category, you must select *Results*. If such category is not available, it must be created at that time.

It is advisable to select the filter name so that you enter the call script, the question and the answer to have a better view of the results filter assignment.

Fig. 12.68: Call scripts-Results report-Results filter

You can add several filters to any given report. Click on *Save Results Filter* to store the call script-filter combination and ensure it is automatically displayed in the report upon the next call. Please note that the conditions in the results filter only affect the count of successful answers and the total number of calls.



Result

Download PDF XLS Download

number	User	Guide Name	Date / Time	Customer	Status	Erfolg Frage 1 Antwort 3
1	Miller, Peter	001_AAA _Erfolgsauswertung	06.07.2012 14:52	[illegible]	Calls not reached finally	
2	Miller, Peter	001_AAA _Erfolgsauswertung	06.07.2012 14:53	[illegible]	Calls not reached finally	
3	Miller, Peter	001_AAA _Erfolgsauswertung	09.07.2012 09:26	[illegible]	Calls	
4	Miller, Peter	001_AAA _Erfolgsauswertung	09.07.2012 09:26	[illegible]	Calls	ja
Sum	Miller, Peter	001_AAA _Erfolgsauswertung		4x customers		1

Fig. 12.69: Call scripts-Results report-Results filter / Results list

12.7.6 Call scripts - List

There is an additional call scripts reporting option under *Action / Scripts List*.

12.7.6.1 Settings

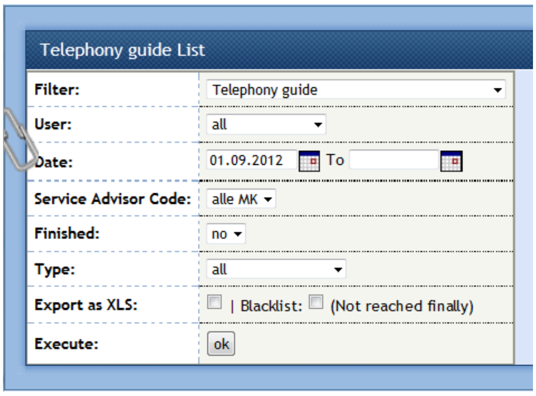


Fig. 12.70: Scripts - List - Settings

Filter:	Call script selection
User:	Overview of all or individual call center agents
Date:	Restriction of the period under review
Service advisor code:	Display the master for the script-related invoice
Finished:	Cases marked as OK
Type:	Distinction of questions with and without answers
Export as XLS:	Creation of an additional XLS file
Blacklist:	Export finally unreachable customers
Execute:	Confirmation of entries

12.7.6.2 Report

After clicking *OK*, the result appears in a table.

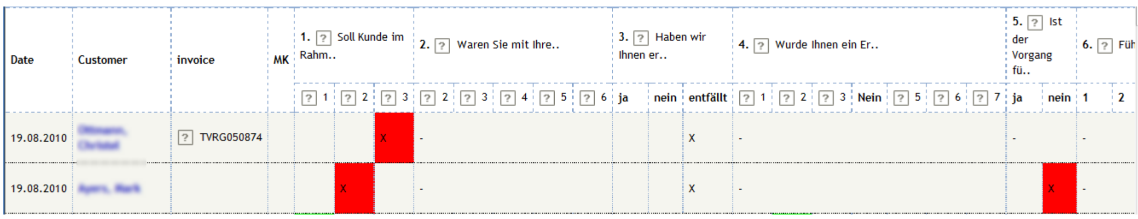


Fig. 12.71: Scripts - List - Results list

Next to the customer name, invoice reference and, if entered, the master, all the questions and answers of the script will be displayed. If answers are provided with colours in script management, these will be shown here for the corresponding answers.

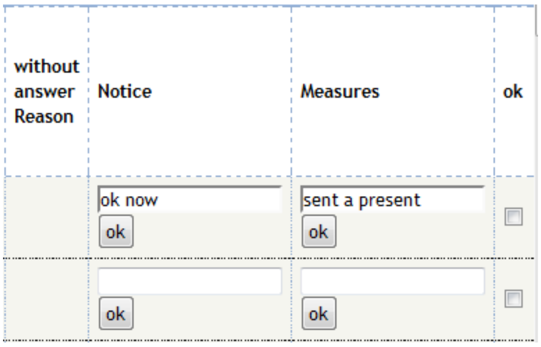


Fig. 12.72: Scripts - List - Comments and Measures

At the end of the table, you can enter comments and measures. After clicking *OK*, the entries are stored.

12.8 LeadIT - Report

Go to *Action / LeadIT Report* to download a report from the LeadIT portal. To that end, you must select a category, date, format, type, campaign, and the storage location. This report will be shown as a link (temp/leadreport.pdft). Click on the link to open the PDF file.

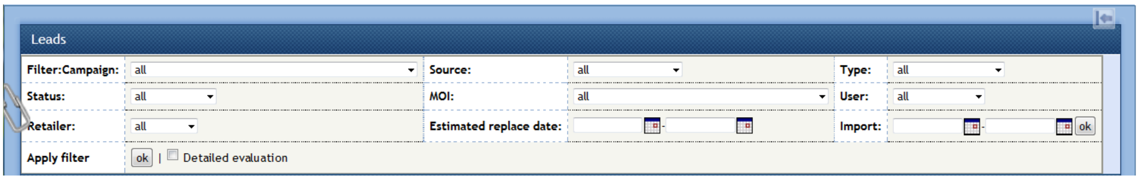


Fig. 12.73: LeadIT - Report - Settings

The report is part of LeadIT and CRM and has no influence on the design or contents of such report.

13 Call center module / Call scripts

13.1 Managing call scripts

First of all, you must create a call script. To do so, go to *Administration / Call Scripts* to open the Call scripts management page. Each line represents a script and the first line is used for new entries. The name is mandatory; time constraints (validity) determine the display of call scripts to end users. Besides restricting access to a certain user group, you can also determine whether an appointment creation option should be displayed in a group calendar (e.g., for sales persons). This requires call center users to be authorized for the relevant calendar. Depending on installation, it can be specified whether this selection is automatically performed upon phone system usage. Additional links are displayed after adding a new script.

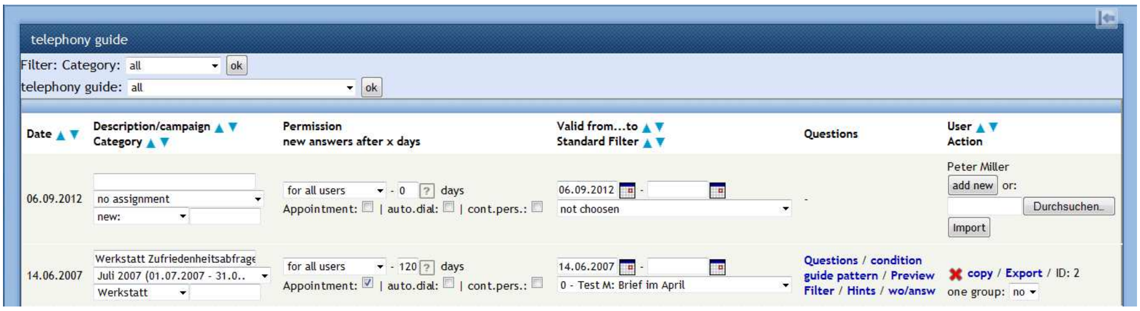


Fig. 13.1: Script management

If several scripts are grouped, the records for these scripts are not processed separately.

13.1.1 Questions

Scripts must necessarily comprise a number of questions to be asked and their possible answers. The *Rank* determines the display order of the questions. As usual, the first line is used for new entries. Depending on *Type*, further answer fields appear. For figures, text and comments fields, the character width can be specified in *Size*. Moreover, you can define a question as a *Mandatory field* and set a *Success condition* for further evaluation. For a question such as "Do you have interest in our new product?", success can be defined in the condition as a positive - "YES" - answer. In this case, the best approach is to define a default field containing the two possible answers - YES and NO. By *Report: Count* allows defining a numeric field for reporting whose value will determine whether success has been attained.

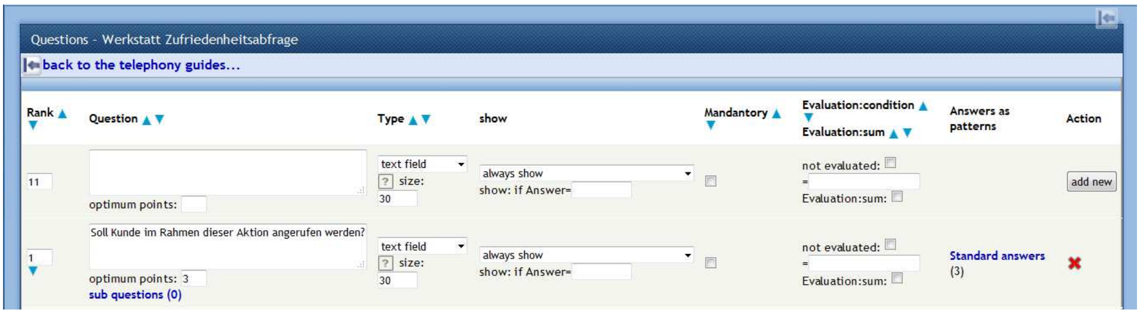


Fig. 13.2: Script creation - Question definition

The link *Standard answers* can be used to set predefined answers. Answers can be individually weighted. This information can be later retrieved for scripts statistics.

13.1.2 Conditions

You can set any number of *Conditions*, which can be combined in four different question conditions. In the selection field, select the question and answer value that should meet a certain condition. The value is checked for accuracy depending on the setting *equal to / not equal to*. Moreover, a *Note text* can be added. This will be displayed as the specific condition applies to indicate whether the entry is rejected or, otherwise, to simply provide information.

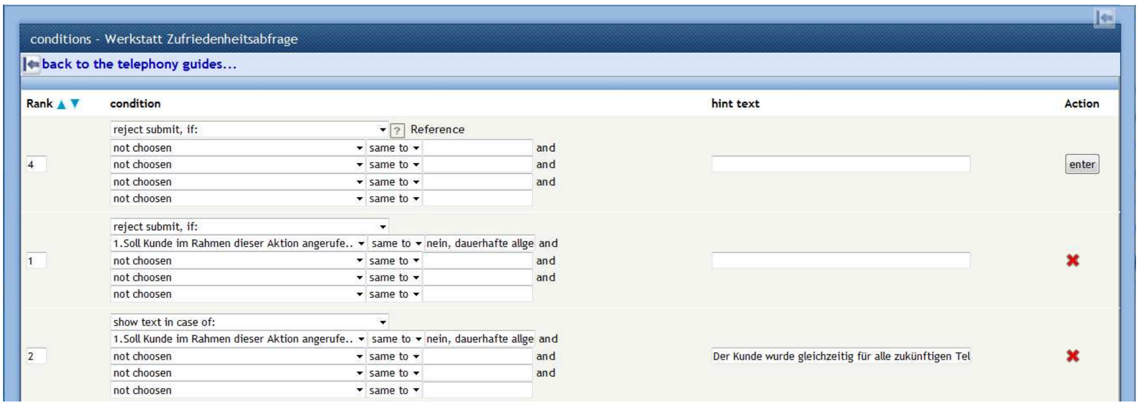


Fig. 13.3: Call scripts - Conditions

In addition, a macro can be executed under certain conditions. Further information is available in chapter *Macros*.

13.1.3 Templates

The appearance of the script entry from can be changed at will. Using an HTML template, questions and answer fields can be moved around to change the layout. By default, a table is always created with two lines where the question and answer fields are always entered. Right of the template entry field, the customer master data fields can be added alongside the questions. Any additional fields that were previously set under *Master data / Groups* can be inserted as well.

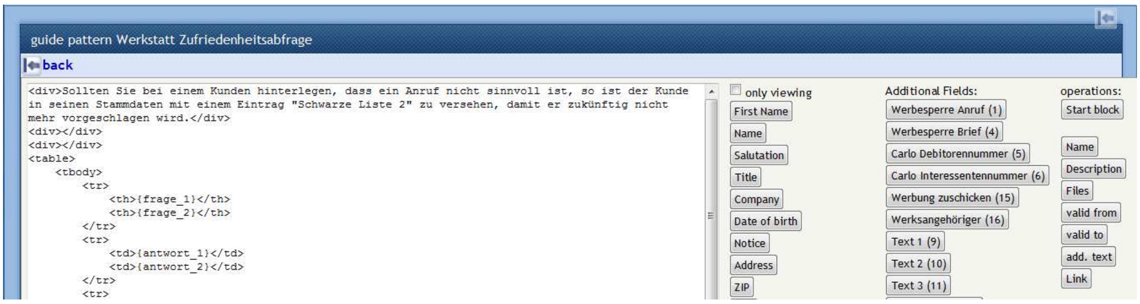


Fig. 13.4: Script creation - Templates

Click on *Enter/Change* to confirm your entries. Any additional questions created after the template is changed are inserted into the template below.

13.1.4 Preview

Click on *Preview* to check the script appearance.

13.1.5 Filter

In addition to standard filters, you can add different filter for individual users or user groups under Scripts management.

Fig. 13.5: Scripts creation - Adding filters

It should be noted that the standard filter assigned to the script is replaced with the filter selected here for individual employees.

13.1.6 Hints

Hints are used to display brief support information in the scripts entry form.

Fig. 13.6: Scripts creation - Hints

Hints are displayed to the right of the header as symbols. Move your mouse over them to view their text contents.

Fig. 13.7: Scripts creation - Display hints

13.1.7 No answer (out)

If you wish to mark a call script customer as finally unreachable, press the button *No answer* in the call center. By default, the answer *Not reached finally is* entered. In this case, the customer will not reappear in the call script until the number of days set under Script management (*new answer after x days*) has lapsed. Alternatively, you can define a period in the *No-answer* setting so that the customer reappears earlier in the script. Needless to say, you can use this button to remove customers from the script for any other reasons, e.g., incorrect phone number.

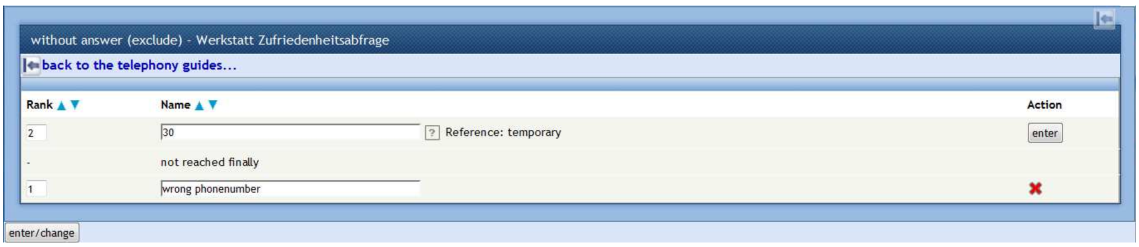


Fig. 13.8: Script creation - Definition of No Answer

13.2 Launching scripts / Call Center menu

There are several ways to assign a script to a person:

- The customer calls and the CC tab pops up with the following script selection
- The customer calls and manual selection of the corresponding script from the customer overview
- Selection of the menu item *Call center*

13.2.1 Calling customers

After a customer call, you can find all available scripts in the tab *CC*. The correspondence date is already added during the call. Click on this date to display the answers provided. If you want to define a new entry for this script, click on *New entry*.

Fig. 13.9: Calling - Call Center tab

Alternatively, the script can also be selected in the customer overview and answers are stored anew.

Fig. 13.10: Calling - Master data tab

If you move your mouse over the info window *Protocol*, all call attempts and all completed calls are shown in detail.

13.2.2 Calling customer groups

Calling a group of people, i.e., a previously created selection of customers, can be better handled through the *Call center*. From the total data pool, a new record is automatically assigned after processing a data set. When working in teams, this will avoid calling any customer twice.

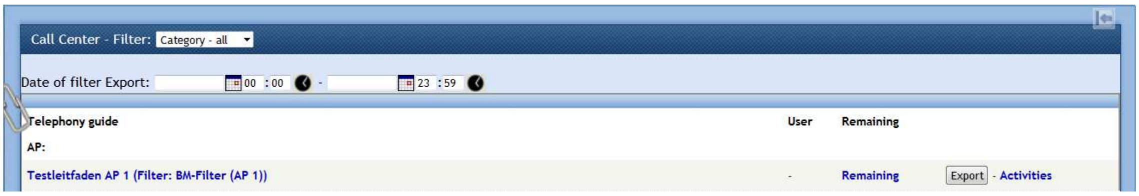


Fig. 13.11: Call center overview

Before calling the menu item *Action / Call center*, you must create scripts and associate them with filters. All valid script-filter combinations are displayed here.

By clicking on a script name, a customer is retrieved from the data pool of filtered records and displayed.

Fig. 13.12: Call center - Master data overview

The upper pane contains the customers' master data. In the *CC-Comments field* you can enter information that is only visible if the customer appears in a script or in the customer overview, if the CC tab is enabled. The *Protocol* tab lists all attempted and completed calls. *Master data - Comments* can only be modified in the tab *Master Data*.

If this was considered during the call script creation (Appointment box checked), all calendars for which the user has write-permission are available. If a calendar is selected, it will open in a new window. The customer reference in the appointment is already generated. It only requires selecting a day, time, and employees in the calendar. By default, the call script name is entered in the subject line. The comments field holds all questions and answers in the script for that person.

From the call script, you can view important customer information in tabular form. To that end, the desired fields in the corresponding field must be dragged to the List view. All other information can be accessed through the blue-coloured *Additional information* link, which opens a new window.

If a call script was not completed, for example because the customer was unreachable, three possibilities exist:

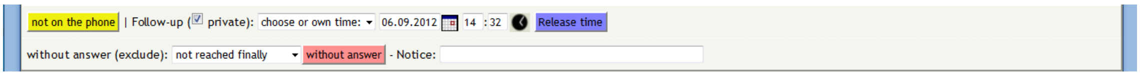
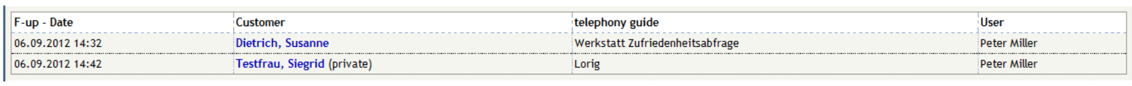


Fig. 13.13: Call Center - temporarily unreachable customers

- **Follow-up:** The customer will be made available to any employee after the corresponding period. This is under the assumption that, at that point, the customer remains in the call script. If you want to create a private follow-up, check the corresponding box and the customer will only reappear for a given employee after the corresponding period. You can see the number of follow-ups in the call script overview.
- **temporarily unreachable:** The customer is blocked for four hours and will re-appear if necessary in the call script on the next day at the earliest.
- **no answer:** If this customer should no longer be called from this call script, you can select *No Answer* and specify a detailed reason in the drop-down menu.

If the call-back alert is enabled in the CRM system, all future calls for which a follow-up has been created will appear amongst the customer information and the questions. Click on the customer name to change the script if necessary and enter the corresponding answers.



F-up - Date	Customer	telephony guide	User
06.09.2012 14:32	Dietrich, Susanne	Werkstatt Zufriedenheitsabfrage	Peter Miller
06.09.2012 14:42	Testfrau, Siegrid (private)	Lorig	Peter Miller

Fig. 13.14: Call center - Call-back alert

13.2.3 Exporting data

The administrator can export all customers along with their answers under *Call center*. Next to the script name, the administrator obtains a count of available records in the campaign (*superimposed*) for the filter specified.

Click on the *Export* button to export your data to an Excel file. In doing so, the master data for each called customer as well as the answer for each question posed will be displayed. If you wish to filter the export data by date, use the field *Date-export filters*.

Important: If an additional filter is simultaneously active, only records meeting also this filter's criteria will be exported.

Export - Show all

Export from	Type	Date from	Date until	User	Group filter	Filter	File
06.09.2012 10:44	Export			Peter Miller		Potsdam	File
17.07.2012 10:36	Export			Peter Miller		0 - Test M: Brief im April	File

Fig. 13.15: Call center - Exporting data

You can find a table with the exports of all employees under the call scripts list. Click on the link *File* to review individual exports. Use the red *X* to remove any export.

14 Vehicle trade

14.1 Vehicle search

The vehicle search option under *Action / Vehicle search* allows querying the vehicle stock. These can be reserved in CRM and an associated test drive, an offer, or a sales contract created.

The templates for this sale process are Word templates, which are customized for the dealership at the beginning.

Vehicle search provides two viewing options.

The selection between default search and the new search form is shown in the left upper corner of the screen.

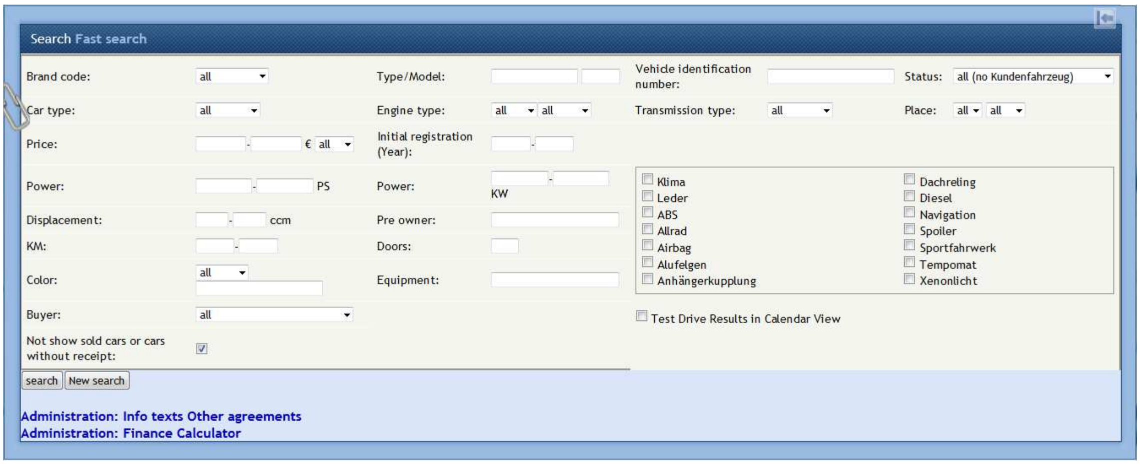


Fig. 14.1: Vehicle search - Default

Fig. 14.2: Vehicle search - New search form

Vehicle can be searched by the following fields:

Brand code:	Selection list with e.g., Opel, Chevrolet, Saab
Type-Model:	Entry of e.g., Corsa
Price:	Entry of a number from-to

Mileage:	Entry of a number from-to
Power:	Entry of a number from-to
Storage location:	The first selection field shows the storage location maintained in Carlo for the vehicle (the vehicle's location). Moreover, the right selection list displays the branch codes from Carlo (the billing branch for the vehicle)
Equipment:	Option to search by specific equipment provided these have been maintained in Carlo
Status:	Selection list with vehicle status from Carlo
Type:	Selection list with e.g., limousine
Doors:	Entry of a number (e.g., 4)
Colour:	Selection list with primary colours plus a free text-search field, e.g., search for "metro"
Chassis number:	Entry of a VIN number or parts thereof (with "*")
License plate:	Entry of the vehicle-assigned license plate
Engine type:	Selection list with Gas, Diesel, LPG, and CNG. In addition, you can find a selection menu with detailed information from Carlo.
Transmission type:	Selection list with 5-speed, 6-speed, Easytronic, and Automatic
Cylinder capacity:	Cylinder capacity specification from-to
Owner:	Name of the vehicle owner
Buyer:	Ordering party

14.1.1 Display of vehicle search results

After entering the search criteria, users are presented with a preview list regardless of the search form used. Move your mouse over the type-model name and a separate window opens with equipment characteristics and vehicle warranty information.

Fig. 14.3: Vehicle search - Results preview

Click on the vehicle name to view a results list with the following information:

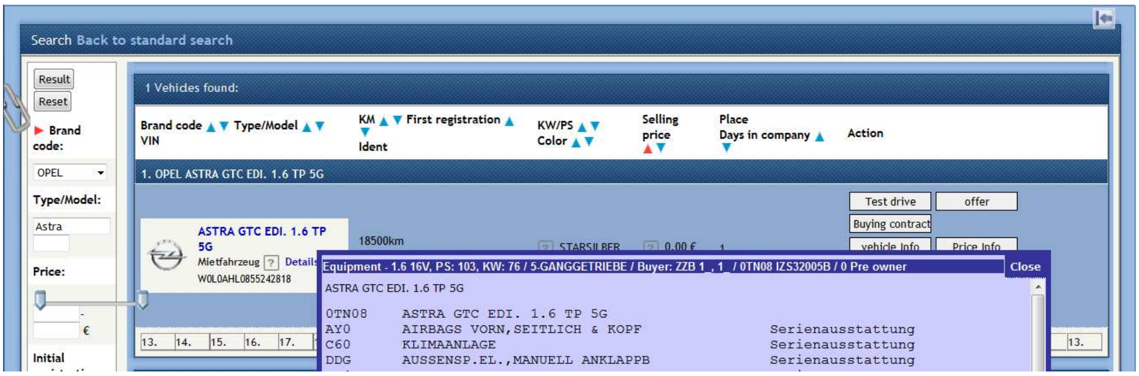


Fig. 14.4: Vehicle search - Results list

Brand / Type / Model: Under the type-model name you can view the vehicle status and VIN. Move your mouse over *Details* to view equipment information. The first, greyed-out row shows the buyer, the vehicle model number, and also the vehicle's owner number amongst other information.

KM / SR / License plate: Display of mileage. The initial registration is usually omitted for new vehicles. Below, the actually maintained license plate is displayed.

KW / HP / Colour: Display of the corresponding value

Actual sales price: Displays the actual sales price from Carlo (under Vehicle equipment, the value *Sales price with tax*). Move your mouse over the value to view further upsell actions. These are maintained in the vehicle equipment in Carlo with the names WEM1 - WEM5.

	The EK-price is net of taxes and is also obtained from Carlo's vehicle equipment table. The gross amount is calculated as follows: ((VK/1.19)-WEM-EK).
Stand location / tag:	Stand location and stand tag of the vehicle
Test drive:	Creation of a test drive appointment
Offer:	Creation of an offer
Sales contract:	Creation of a sale contract:
Vehicle information:	Creation of vehicle data sheet, which must be previously customized by the Company.
Price information:	Creation of a vehicle data sheet for customers
Financial calculator:	Financing calculator for prior information
Reservation:	Vehicle reservation for 48 hours

In the row under vehicle data, you can view a summary of scheduled test drives for the coming 30 days. In addition, you can display all test drives for the coming three months for all listed vehicles. To that end, the corresponding box must be checked in the vehicle search form.

14.1.2 Creating a test drive

To schedule a customer test drive, you must click on the button *Test drive* in the corresponding vehicle from the search results.

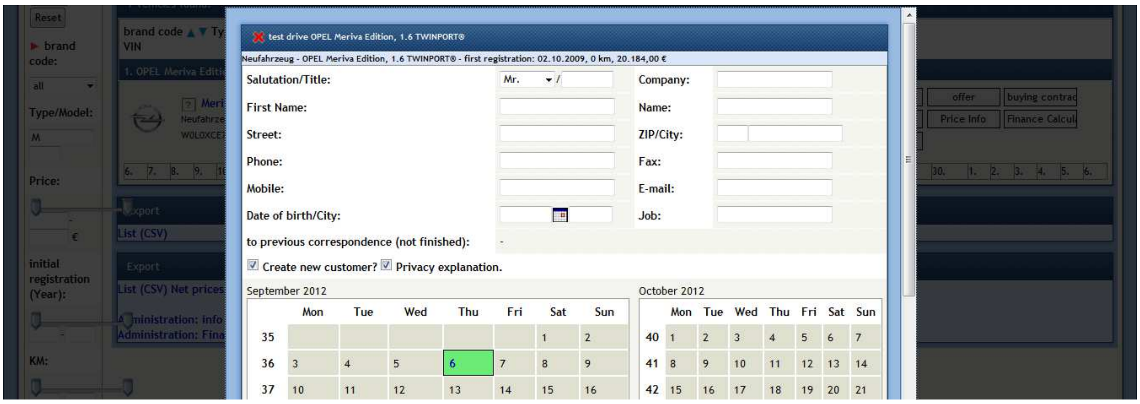


Fig. 14.5: Vehicle search - Creating a test drive

You may fill the customer data in three different ways:

a) Transfer of an existing customer/prospect via the button with the customer name:

the last customer called in CRM will show in the button below the customer fields in the form. Click on the name to directly transfer the relevant customer data.

b) Transfer of an existing customer/prospect via Search:
enter the first and last name to activate the CRM search; results will appear in the lower part of the screen and can be transferred by clicking on the form.

c) Creation of a new record:
If search results are negative, you can create a new record by filling the necessary fields. In doing so, the *New customer* box remains checked. For Companies with several storage locations / clients, the right one must be selected.

In the row *Pending correspondence*, all open contacts and customers to which you intend to assign a test drive are displayed. Thus, the complete sales process can be represented.

The box for the automatic creation of data protection documents is checked by default. If data are already maintained in the system, the status is shown via an information window.

Below, you can see the monthly view of the calendar for the current and following months. As long as this vehicle is delivered in one day, the day appears in a distinct colour. Click on a day to transfer the dates to the input fields below. In addition, you must enter the time, costs, free mileage, and license plate.

The process is closed by clicking on *Create test drive*. Finally, the Word template for test drives with customer data opens for printing.

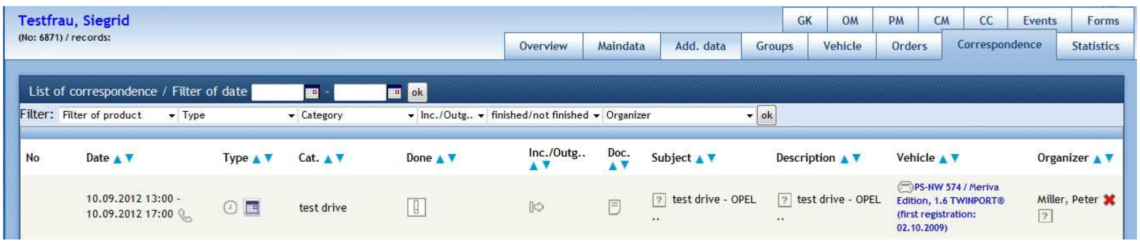


Fig. 14.6: Vehicle search - Test drive appointment in customer correspondence

This appointment will be displayed in the calendar of the vehicle, employee, as well as in the customer correspondence.

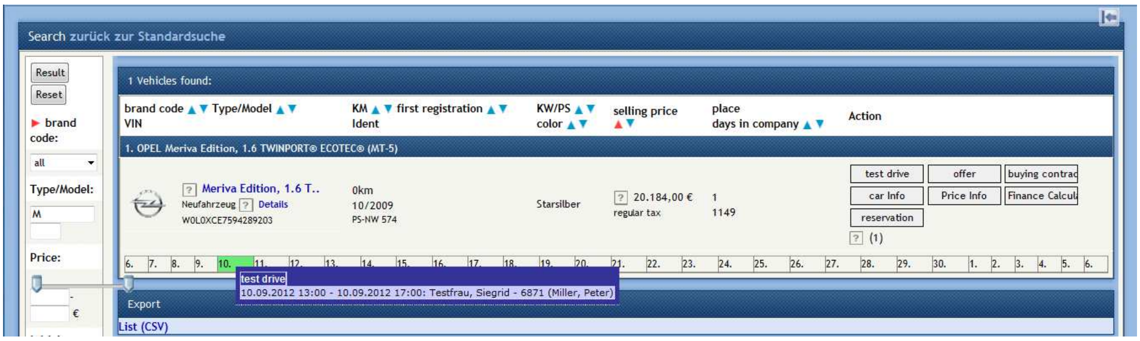


Fig. 14.7: Vehicle search - Test drive appointment in vehicle calendar

To process this test drive appointment, click on the exclamation mark to show the contact results window. If the start and ending mileage is entered here, you may later create test drive lists for individual vehicles using the Filter Wizard.

Fig. 14.8: Vehicle search - Mileage for test drives

14.1.3 Creating an offer / sale contract

To create an offer / sale contract for a stock vehicle and a particular customer, you must click on the buttons *Offer* or *Sale contract* for the relevant vehicle in the search results list.

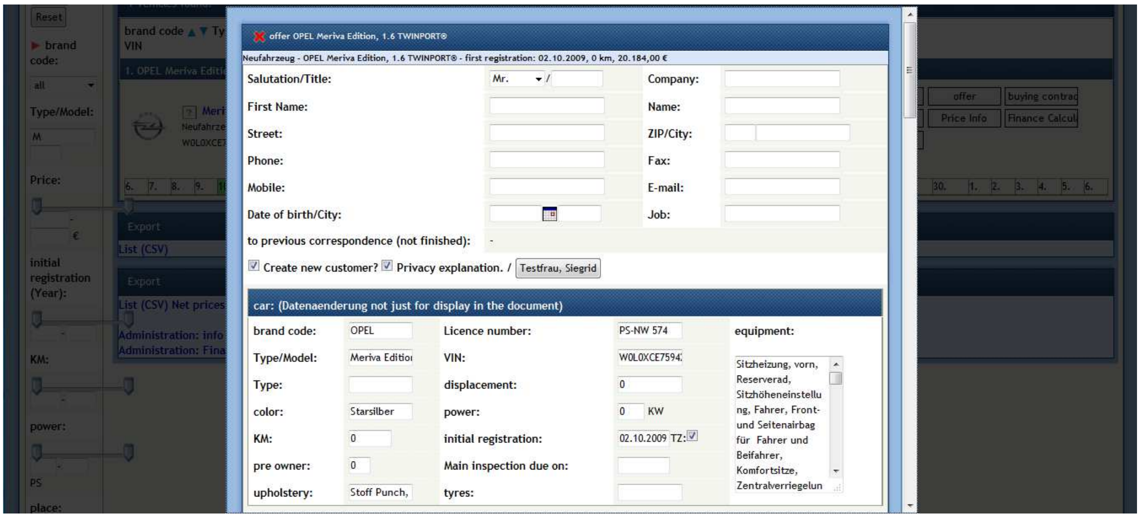


Fig. 14.9: Vehicle search - Creating an offer

Similarly to test drives, you can transfer the data of the last processed customer, search for a record, or create a new prospect. To ensure the process chain completeness, you can enter a reference to a previous offer below. In doing so, the dealer affiliation, discounts, other agreements, and the information text will be transferred from the quote.

In principle, the first section will show the vehicle data that you can modify. If the offers/sale contract data displayed is changed, the vehicle data in Carlo must be separately modified.

The system supports three offer / sale contract types, namely:

a) sale contract on one page
b) executable sales contract with all price equipment (if needed over several pages)
c) executable sales contract with all equipment (if needed over several pages)

14.1.3.1 Sale contracts for new vehicles

In sale contracts for new vehicles, you can check a box in the first section for the initial registration of vehicles with a one-day registration. Checking this box adds a text to the comments field.

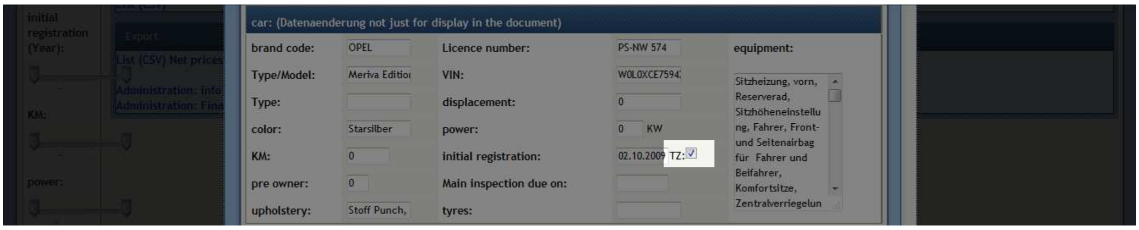


Fig. 14.10: Vehicle search - Offer creation with one-day registration

Specify the storage location where the vehicle will be sold in the contract details section. In addition, you can enter the delivery date.

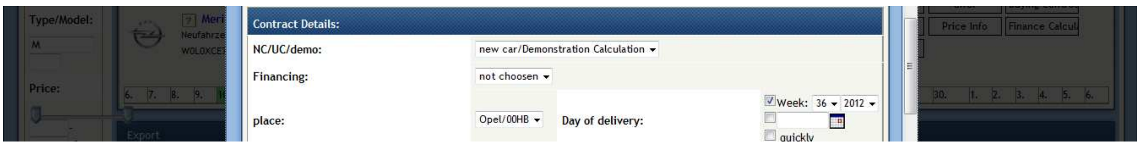


Fig. 14.11: Vehicle search - Offer creation / Contract details

The calculation lists the list prices as well as the special equipment stored in Carlo as equipment for the vehicle. Thus, you can add accessories to the offer / contract afterwards.

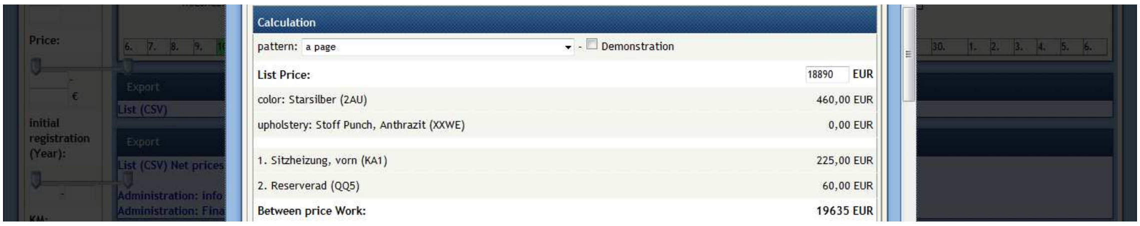


Fig. 14.12: Vehicle search - Offer creation / Calculation

Behind the fields of dealer installations there is a search that accesses the names and prices of articles of equipment maintained under *Management / Product management*.

Discounts, etc. are stored in the price adjustments area. These are printed by default, but can be removed by unchecking the box in the document.

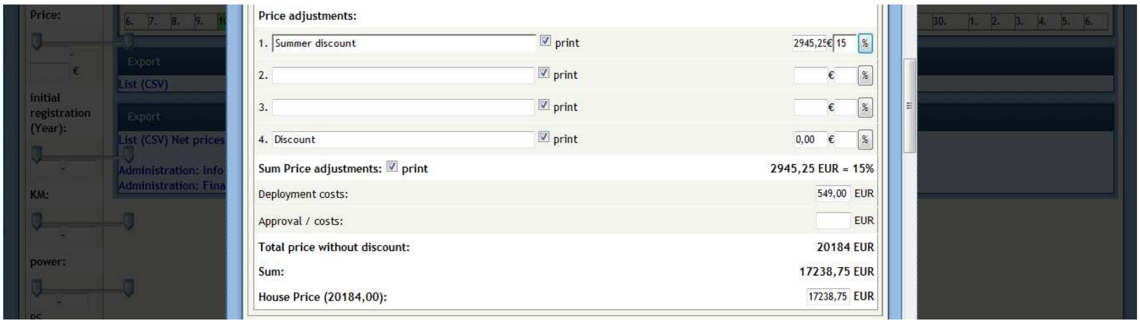


Fig. 14.13: Vehicle search - Offer creation / Price adjustments

Deployment and licensing or additional costs can also be entered.

Both the total price without discount and the amount will be automatically calculated. The Company price may still be manually changed.

If the old customer's vehicle is considered a trade-in, the appropriate vehicle can be selected and included in the offer or sale contract.

Fig. 14.14: Vehicle search - Offer creation / Other aspects

If, upon payment, the participating vehicle is not in possession of the selected customers and, therefore, cannot be selected from the dropdown box, it can be searched through the fields *VIN* or *license plate* and then transferred. After integrating *EurotaxSchwacke GmbH*, the vehicle and customer data can be transmitted to the evaluation program, and the results used in CRM.

If you check the box *Contract conditions*, these can be opened and printed by clicking on *Create*.

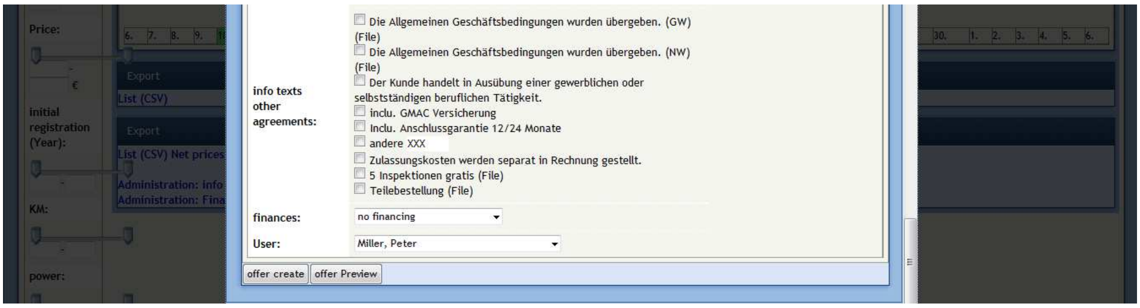


Fig. 14.15: Vehicle search - Offer creation / Information text

The *Information text* can be individually maintained by the administrator of any Company in the vehicle default search window.

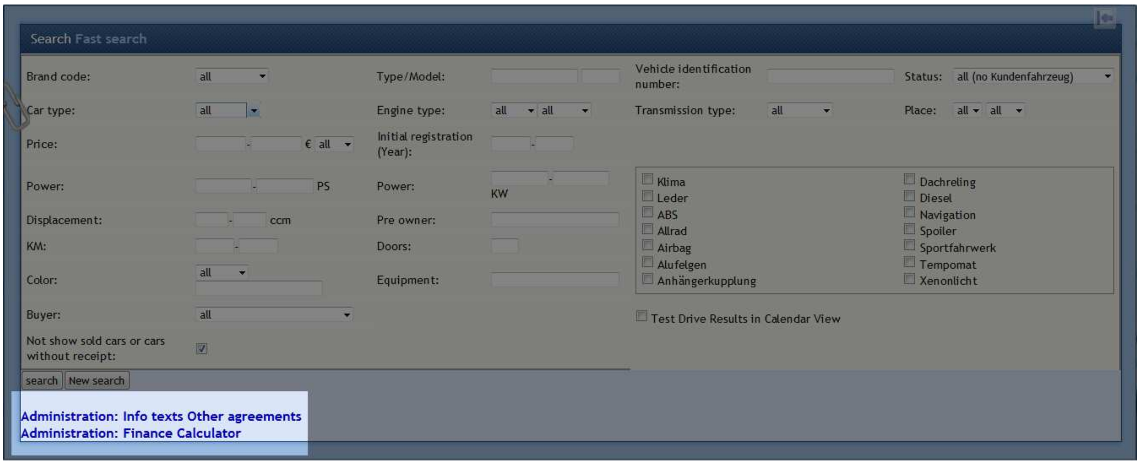


Fig. 14.16: Vehicle search - Management of information text / Finance calculator

Click on the link to open a table where you can upload additional files. If the sales person checks the box in this information field, this document is also available for printing.

If the administrator enters the string *XXX* in the text field, this serves as a wildcard, and the employee may enter any additional text in this field.

Choose *GMAC or Santander Finance* to open a separate window with the bank's home page, where you can start your financing request as usual.

In the sale contract, the box *Other offers,* is checked by default so that other open offers are closed upon the sale contract creation. If you want to keep these in open status, uncheck the box manually.

If pictures are added to the vehicle card (jpg format), these are available for selection and can thus be incorporated into the document.

14.1.3.2 Demons vehicle - Sale contract

In costing, the demo vehicle template is used whenever the flag *Demo vehicle* is checked. Here, data entry is identical to that of a new car.

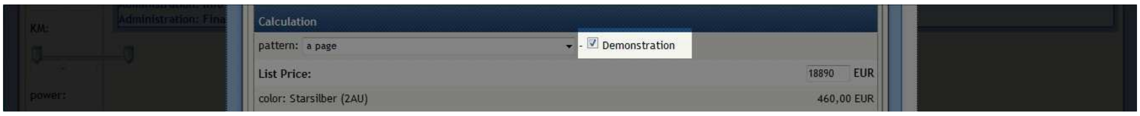


Fig. 14.17: Vehicle search - Offer creation / Demo vehicle

In addition to the payment agreement, it is expressly stated that the vehicle must be used as *Demo vehicle / Test vehicle / Rental vehicle*. The corresponding value is manually highlighted with a pen on the sales contract or the other two fields are crossed out.

14.1.3.3 Used vehicles - Sale contract

The template for used-vehicle sale contract is used whenever *Used Vehicle* is selected in the pull-down menu of the contract details. There are other selectable fields that have an impact on the sales contract. Additionally, you may enter any accident claims.

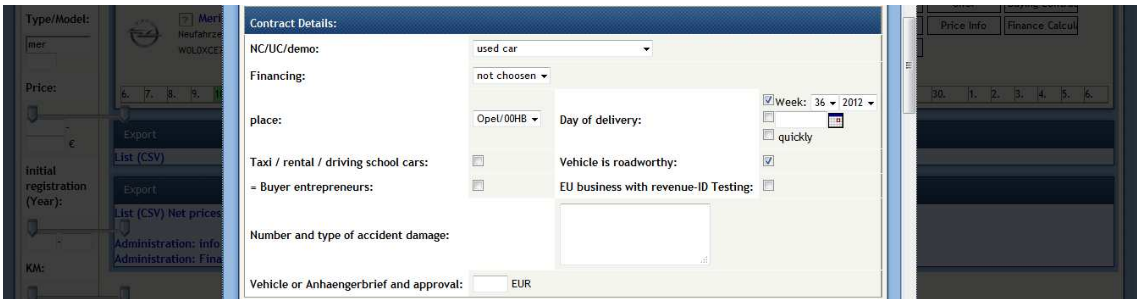


Fig. 14.18: Vehicle search - Offer creation / Used vehicles

14.1.4 Creating vehicle information

By clicking on the relevant vehicle, a previously created Word template opens with all relevant vehicle information. This page printout is neither associated with a customer nor documented.

14.1.5 Reserving a vehicle

By clicking on the link *Reservation*, the vehicle will be reserved for 48 hours. No other employee (excluded administrators, who can delete the reservation), can create an offer / sales agreement for the vehicle during such period.

A reserved vehicle is displayed in the search results list in red. In addition, each user sees by whom was the vehicle registered and how long it is still reserved. After 48 hours, the reservation is automatically cancelled. As the administrator, the seller who reserved the vehicle can delete the reservation at any time.

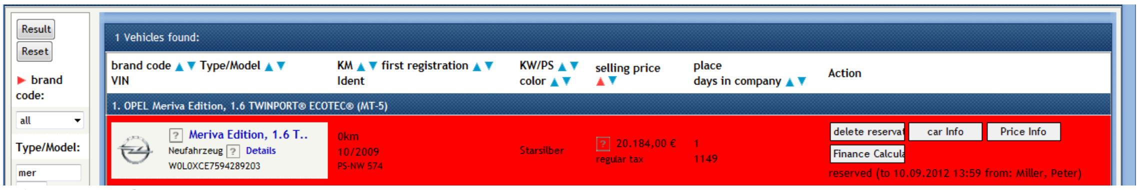


Fig. 14.19: Reservation

14.2 GME-VC

In addition to managing existing vehicles, *Action / GME VC* contains a connection to the Opel configurator. You may use it configure vehicles and generate offers and sale contracts in CRM as you would usually do. This is under the assumption that the dealer code is stored in the menu item *Administration / Clients*.

Select the appropriate client from the dropdown menu to access the vehicle configurator. After compiling all vehicle data, you will find the vehicle configurations stored in chronological order in CRM.

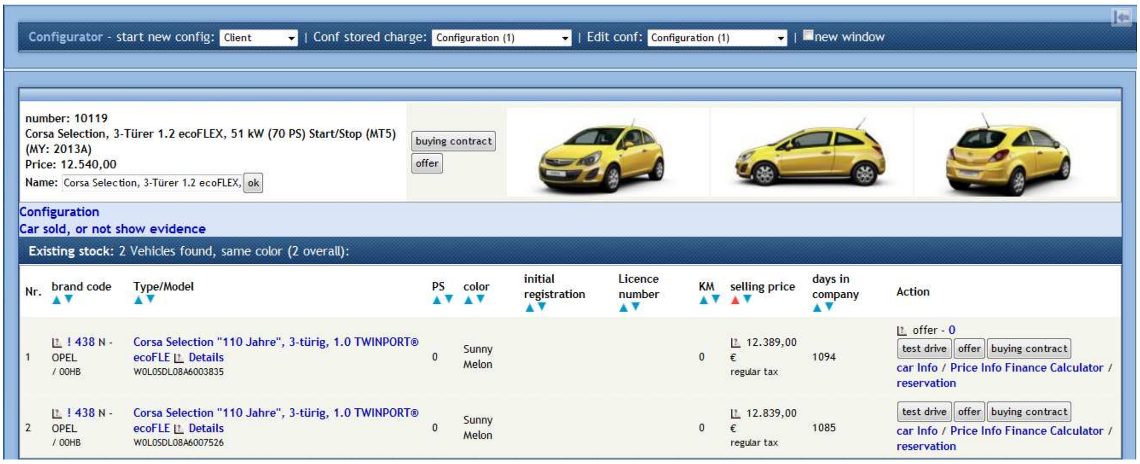


Fig. 14.20: GME VC

Select the configured vehicle to create and associated offer or a sale contract. Under the selected vehicle, ordered and existing vehicles with comparable criteria are displayed. Stock vehicles sold over CRM but not yet transferred to Carlo, or for which Carlo already stores a document, can be excluded from the search results using the link *Omit sold vehicles or Vehicles with document*.

The creation of offers and sale contracts for reconfigured vehicles is similar to that of stock vehicles.

14.3 Overview: Offers and sale contracts

By creating an offer, a new sales process in the offer phase is entered in the customer's offer & sales contracts (OM) tab.

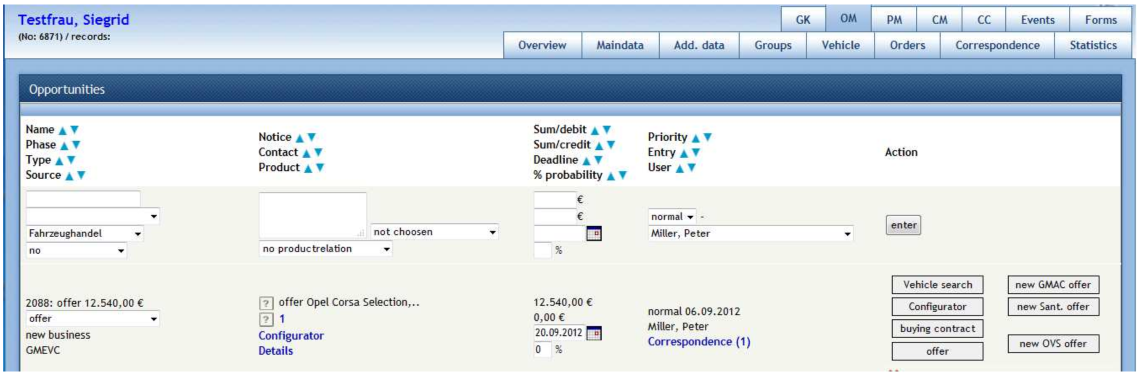


Fig. 14.21: Tab OM (Opportunity management)

The following actions can be started from here:

Vehicle search:	Display of vehicle search with the original offer criteria
Sale contract:	Transfer of customer and vehicle data to the sales contract form
Offer:	Transfer of customer and vehicle data to the offer form for the creation of another offer
New GMAC offer:	Creation of a (further) GMAC request
New Santander offer:	Creation of a (further) Santander request
Refresh:	Update the processing status of an already identified and above selected GMAC / Santander request
Change:	Change the financing request
New OVS request:	Link to Opel insurance page
Use the red X	Entry deletion is an administrator-reserved task

Alternatively, you can create a sale contract for all customers with an offer in the customer overview.

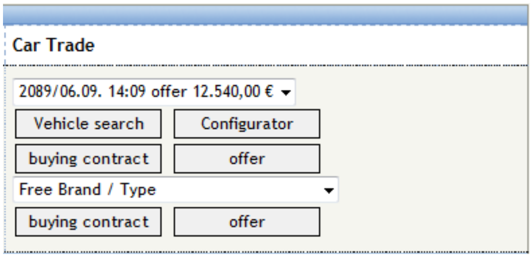


Fig. 14.22: Vehicle trade in the Overview tab

Offers and sale contracts created for a given customer can be found in the customer correspondence tab next to test drive appointments.

14.4 Delivery calendar

Go to the menu item *Action / Delivery calendar* to organize all Company deliveries in one place.

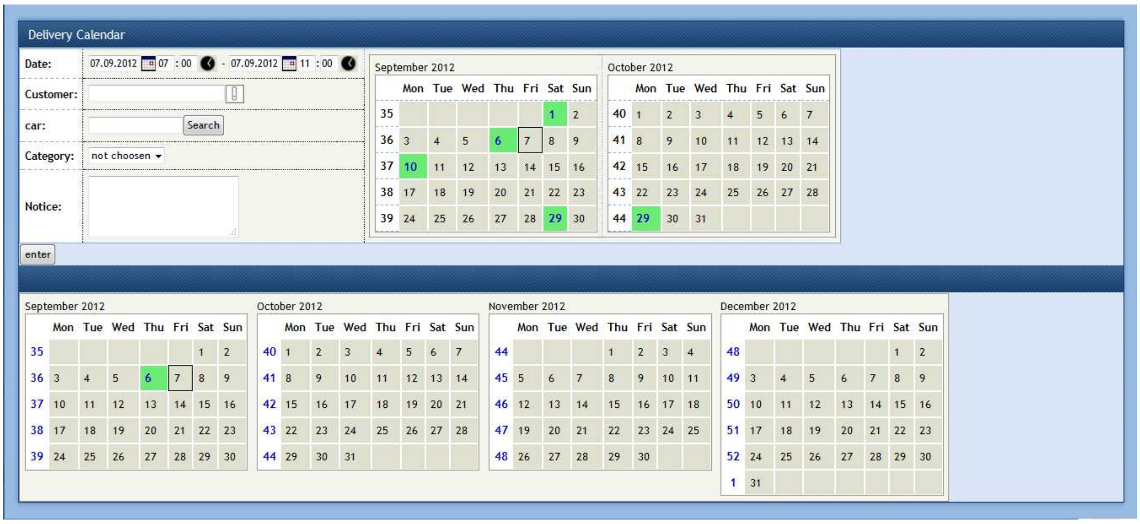


Fig. 14.23: Delivery calendar

Date:	Date and time of the appointment with warnings if a date in this period is available
Customer:	Produces a customer reference. The delivery date is shown in the correspondence list (search by customer number or name).
Car:	Search for an existing vehicle by chassis number/VIN.
Category:	Dropdown box, which must be previously maintained by the administrator under Administration / category.

Notice: Additional information

In addition to the settings, you can find the Calendar of the logged in user, including the preview of deadlines in the delivery calendar.

Click on *Enter* to display the appointments both in the delivery calendar and in yours.

To delete an appointment, click on the appropriate day of the delivery calendar, select the appointment and, in the appointment window, click on *Delete appointment*.

14.5 LeadIT

Inquiries to LeadIT will be fetched by default automatically every 15 minutes. These will be listed under *Action/ Lead assignment*. The button *Fetch new leads* can be used to manually launch the process, for example, to retrieve status changes.

14.5.1 Settings

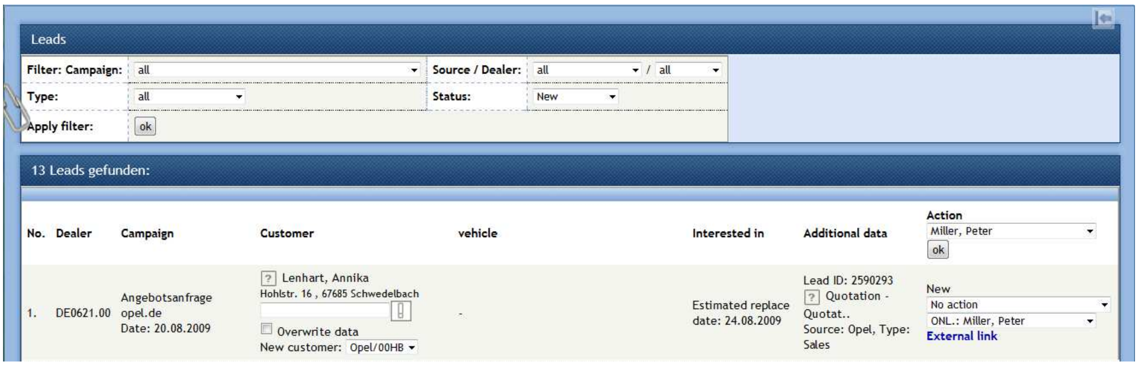


Fig. 14.24: LeadIT - Lead Assignment

Filter:	Selection of submitted campaigns
Type / channel:	Service, sales, or GMAC
Int / customer:	Search for a specific record
Status:	Distinction between new and pending leads
CC:	Leads that were routed to the external call center
Vehicle:	Search for a specific vehicle

14.5.2 Lead assignment

There are three options available for lead assignment:

- Adding a new customer (customer name field blank)

- automatic identification of customers with accurate name and address spelling with possibly data changes transfer (check box *Data overwrite)*. New customers are listed with the numbers 1 to x and can be viewed here.
- manual customer search by entering customer or vehicle data (license plate and vehicle identification number) in the input field

In the column *Action*, it will be decided how to progress the lead:

No action:	No action is taken
Accept:	Customer is assigned to the seller selected below
Other / external link:	External LeadIT site opens per customer

14.5.2.1 Lead forwarding

Leads forwarded to a seller can be forwarded to another user.

14.5.2.2 Call center leads

If a lead is not processed by the dealership, it can be centrally managed and "taken away" from the dealer by OPEL. The lead is then processed by an OPEL Call center. If so, the corresponding lead is recognized and cannot be edited. This can happen in several phases.

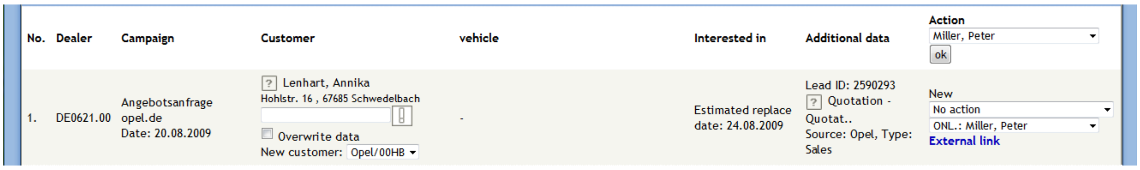


Fig. 14.25: LeadIT - CC leads

Further processing is only possible after the reassignment of a call center.

14.5.2.3 Display of lead information

The lead history can be directly viewed in the lead-container of the correspondence field.

To directly view the current status of the leads, check the *Status* field. In addition to information on history information (new, contacts, test drive, offer, sales contract), the lead import date is also available.

14.5.2.4 Lead execution process

As described above, during the transfer of leads, it will be examined whether these are already being processed by the call center. For this purpose, a check is executed and documented.

In the current version of LeadIT, the status that the customer has opened will only be submitted to LeadIT if the seller clicks on the exclamation mark of the task in his/her PIM or on the customer correspondence.

There, the entire lead content is available.

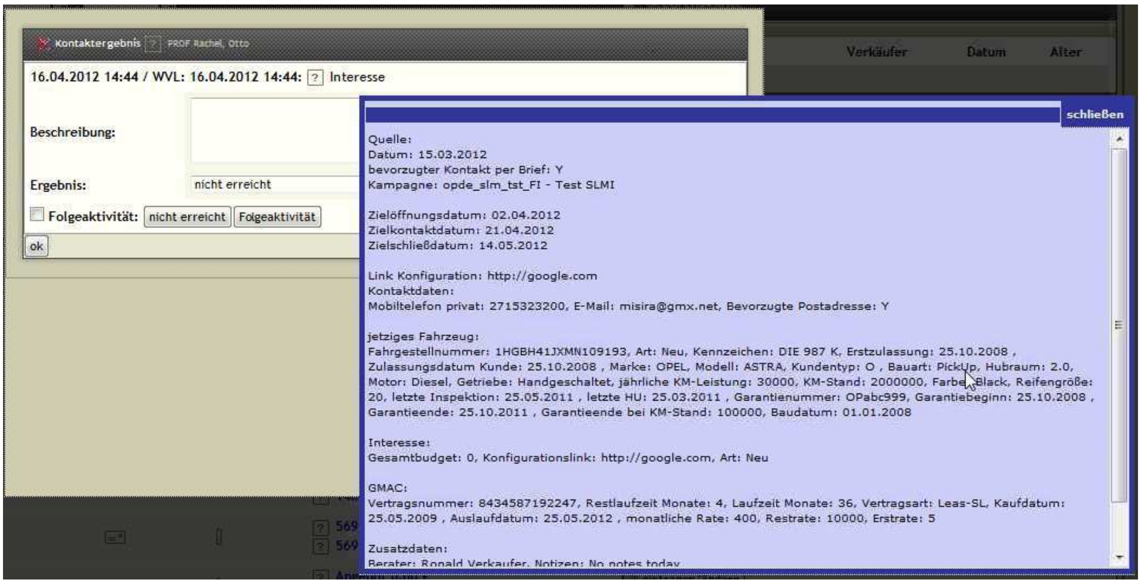


Fig. 14.26: LeadIT - Correspondence entry

After a lead is finally closed in CRM (negative or positive), all customer data that was retrieved from the lead and possibly changed in CRM, is sent back to LeadIT and updated there.

14.5.2.5 Uncalled leads

Go to *Action / LeadIT open leads* to view all leads for a given period and storage location, which are still in LeadIT and have not yet been downloaded to CRM.

14.5.3 Integration of vehicle exchanges and contact forms

If previously configured by the dealership, requests from vehicle exchanges and contact requests from the company's own website are also displayed under the menu item Action / LeadIT with their own campaigns.

As the leads, they are distributed to the employees.

15 Other functions

15.1 Outbox

If configured, the Outbox can be found in the menu item *User/ Outbox*. There, all letters and e-mails that have not been printed or submitted, that is, which still have a pending status, are displayed.
Besides *Date, Customer, User, Type, Category, Subject and Content*, the table shows a selection related to the entry. If the *Action completed* is selected, the entries are set to completed, but no e-mails are sent or letters open for printing. For e-mails, if the action *Send e-mail* is selected, they will be sent, their status set to complete, and thus eliminated from the list. For letters, select *Print* to collectively open and print them. Click on *Execute* to perform these actions. Letters are then opened in the text editor and can be printed. If you click on *all: completed*, all entries are set as complete without executing any actions.

15.2 Central E-mail fetch

Go to *User / Fetch E-mail*, to fetch e-mail from the central e-mail server of the company. If the sender's e-mail address is stored in the CRM system, the e-mail is immediately assigned to the corresponding customer and will appear in the correspondence list. E-mail attachments are packed in a zip file and can be opened in the correspondence list by customers.

Mails can be assigned to CRM contacts in the following ways:

The email will be sent as a BCC or directly to CRM. This email is automatically assigned by CRM as outgoing mail to the customer, insofar as the email address of the customer is stored in CRM.

The mail will be forwarded in CRM; the subject line contains the email address of the person to whom the mail is to be assigned. This e-mail address is removed from the subject after the e-mail assignment.

All e-mails that could not be assigned contain a search field at the end. Use it to find a suitable person to whom the message could be assigned. After assignment, the e-mail is transcoded to the customer and the e-mail address is stored directly in the customer master data. Consequently, further emails to this "new" email address are now automatically assigned to this customer.

If e-mails cannot be fetched due to their size (default: > 1 MB), you can delete the attachments or fetch them with attachments. Long processing times for very large emails are thus avoided.

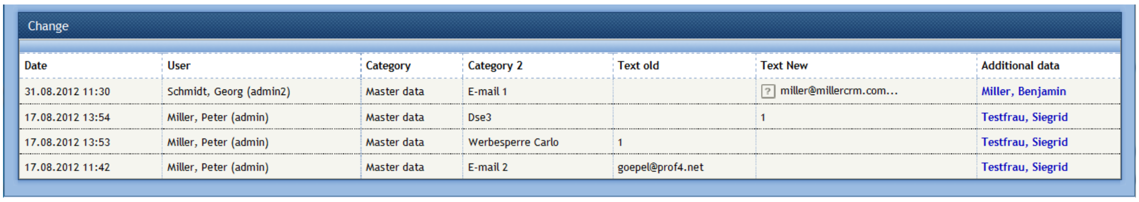
15.3 Printing

Click on *User / Printing* to print CRM pages. This will open the printer menu.

15.4 Log of field changes

Changes that were made in the areas of master data, vehicle, contact information, and additional data in CRM, are documented in the menu item *Administration / Field changes* log.

To that end, you can adjust the changes representation criteria. The result is listed below, sorted by modified date.



Change

Date	User	Category	Category 2	Text old	Text New	Additional data
31.08.2012 11:30	Schmidt, Georg (admin2)	Master data	E-mail 1		miller@millercrm.com...	Miller, Benjamin
17.08.2012 13:54	Miller, Peter (admin)	Master data	Dse3		1	Testfrau, Siegrid
17.08.2012 13:53	Miller, Peter (admin)	Master data	Werbesperre Carlo	1		Testfrau, Siegrid
17.08.2012 11:42	Miller, Peter (admin)	Master data	E-mail 2	goepel@prof4.net		Testfrau, Siegrid

Fig. 15.1: Log of field changes

16 Administration

16.1 Update

To install program enhancements, you must search the update file –a zip file- in the local PC to enter in the corresponding file field. After clicking *Execute*, the enhancements are immediately available for the system users.

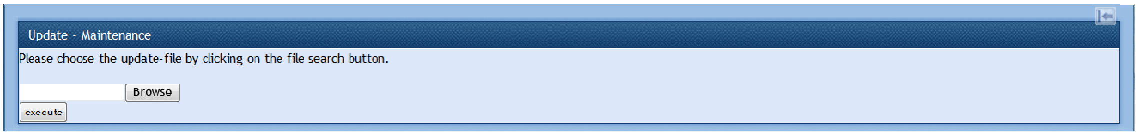


Fig. 16.1: Installing updates

16.2 Importing log data

In the menu item Administration / Import log data, the administrator of the Company can see when the data imports were performed. Amongst other information, it includes a detailed breakdown of the number of records updated or deleted.

16.3 User management

User management is intended for administrators who want to create new users in the CRM system or, for example, must change existing rights.

Fig. 16.2: Creating and changing users

16.3.1 Creating users

The menu item *Administration / User* opens a list with all system users. Enter a new user in the first row and confirm by clicking on the button *Add new entry*. The *Login* is the name that the user must enter in the login screen. The corresponding *Password* is not displayed for security reasons. Users forgetting their passwords must enter a new one -the old one cannot be changed. *First name* and surname should be filled so that the full name can be displayed in data entry screens and summary screens. *E-mail address* is relevant if e-mails are to be sent from CRM (e.g., correspondence).

Rights group determines access rights within the application. In addition, exact rights by user can be set via the link by the rights selection. Navigation, search, and filter selection can be restricted. Finally, tab and filter categories can be blocked and allowed.

In the link *Groups / Clients* you can specify a default storage location for every salesperson, which is particularly interesting for companies with multiple locations. This value is then defaulted in the of sales contract form of the vehicle search.

Use the red *X* to remove users from CRM. Before you do so, you can transfer the responsibilities for all created correspondence and complaints as well as the master data manager to new, selected users. This practice, however, can lead to erroneous information. It is advisable, therefore, not to delete old users but to disable them instead.

Our next topic, user groups assignment, can be found on the right icon next to rights settings.

16.3.2 User groups

Click the link in User management to open the user group management and assignment. The following table lists all user groups. The assignment of the group to the selected user is controlled by the *Assignment* box, which can be separately checked or unchecked for each group. Changes must be accepted by clicking on the button *Enter/Change*. As usual, the first line is used to create a new group. Once saved, you can start assigning users to it. If the flag is greyed out, the assignment to this new group is made by default. The rank determines the group display order.

Fig. 16.3: User Groups

As an example, groups are used the restrict bulletin board entries to certain user groups.

16.3.3 User rights

Access rights determine the precise functionality available to users and whether they can read, modify, or delete system information. The solution distinguishes between users with read-only, read + write privileges, and the Administrator.

In principle, administrators can modify or delete any entries.

16.3.4 User roles

Under the menu item *User Roles* you can define a general role, which can be applied to a variety of users. All settings and access rights that can be managed for each user can be stored in the user role. For example, you can define groups for sales personnel or office staff. Moreover, if you need to add a menu item, this can be centrally enabled for all users in the group instead of individually setting the corresponding rights for each user. To do this, first select the existing role, and then allow changing all values.

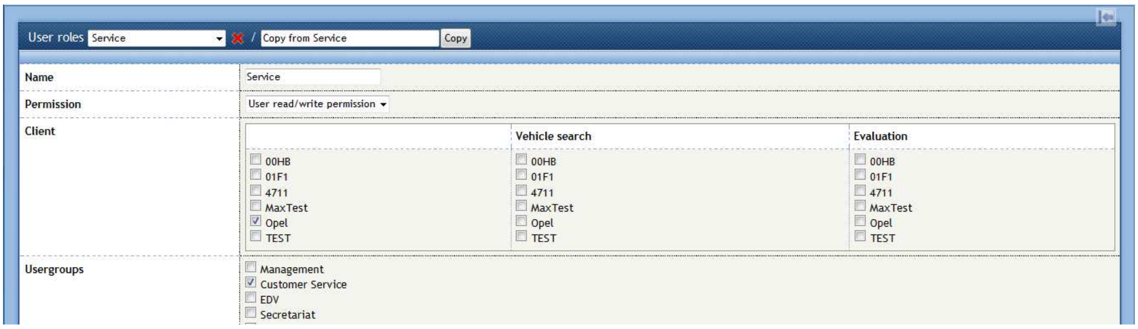


Fig. 16.4: User roles

By default, a new entry is enabled as you enter the user role page.

Each user can be then assigned to an existing role.

16.3.5 User forwarding

In case an employee is no longer working with the CRM system, you can configure user forwarding under *Administration*. Unlike and in addition to macro forwarding, user forwarding passes all follow-ups, birthdays and appointments in the calendar to the assigned employees. This forwarding can also be limited in time, for example if a user is on vacation.

Fig. 16.5: User forwarding

16.4 Menu

16.4.1 Menu administration

Menu items and their activation for specific users and user groups can be set by the administrator or installation consultant. Similarly, their structure and links can be altered to best support the employee`s workflow. Go to *Administration / Menu administration* and enter a new menu item in the first line; all existing CRM menu items appear below.

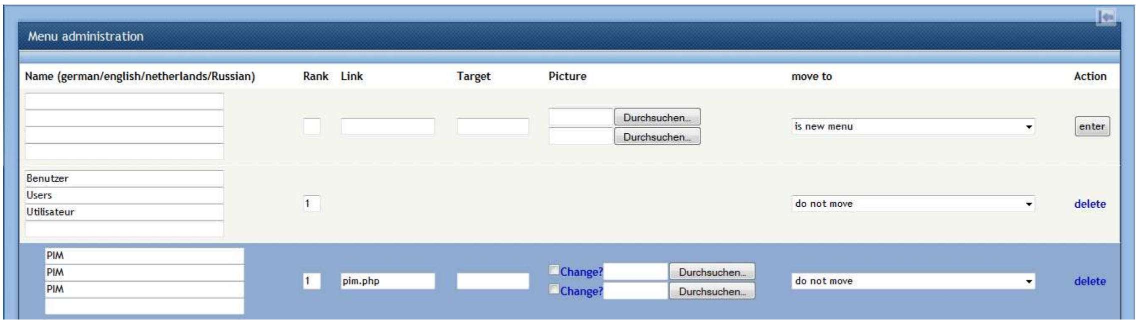


Fig. 16.6: Menu administration

If several languages are available in CRM, you can sequentially enter one translation per row in this page. The rank determines the display order of menu items. The inclusion in a top menu item is done in the prior-to-last column position via the selection list.

Note: changes involving changes the menu system of CarloCRM are administrator-reserved.

16.4.2 Menu rights

Here, you can set the proper assignments to ensure users only see the relevant menu items.

Fig. 16.7: User rights - Menu rights

Access the matrix available under *Administration / Menu rights* and check the desired rights for individual users. The rows contain the individual menu items. All changes must be accepted by clicking on the *Change* button. Use the function *All* to automatically check all columns or rows as you see fit, i.e., a particular user will have rights for all menu items (click on *All* for the user) or a menu item can be selected by all users (click on *All* for the menu item on the left). Please note that these settings override or modify the default rights of the users in their respective groups (sales, accounting, etc.) that were allocated by the company.

16.5 Duplicates

16.5.1 Duplicate check

At times, several instances of the same record may exist in the previous system. You can perform and initial duplicate check to find and merge these duplicates for CRM data cleansing. Once identified, duplicate records can be manipulated in the duplicate records display.

Go to *Administration / duplicate check* to immediately start the verification. This process may take some time depending on the number of records. Therefore, it is recommended to perform the process during reduced business activity periods. During the process, first name, last name, company name and address are compared.

16.5.2 Duplicate display

Duplicate check results are displayed in the duplicate display as the process ends. On each side, potential duplicates appear with their data.

In the upper portion, customer data are compared and differences highlighted in red. In order to decide whether they are similar or identical records, master data must be compared first. For identical customers, use master data to determine which one is the "right" record - on the basis of invoices, vehicles and statistics. Sometimes a simple typo, a move, or a name change may cause record duplication.

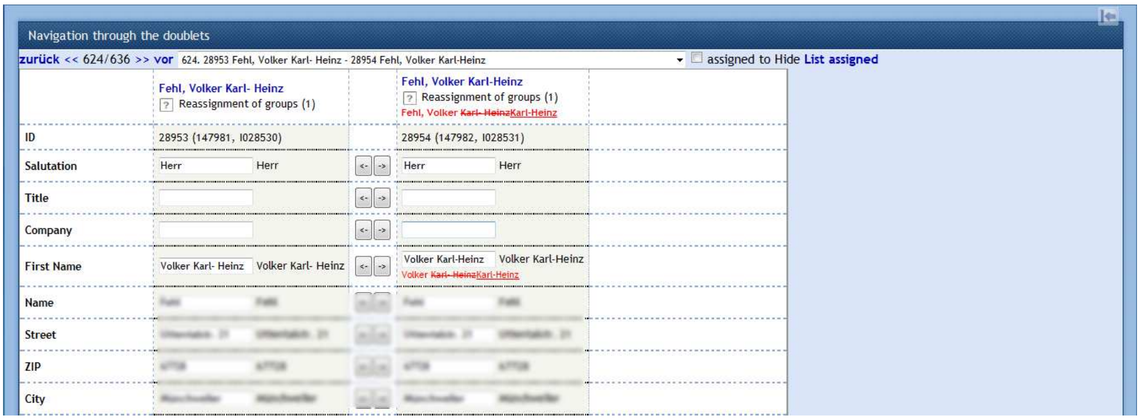


Fig. 16.8: Duplicate display - Master data

It is possible to align the data manually, identifying the correct record and correcting the erroneous one. Use the arrows to copy data between fields.

In the bottom section, vehicles and sales are displayed.

Per section, you must determine to which record the data belongs. Select *Move to other customer* to perform a one-time transfer of correspondence, vehicle, and invoices in CRM to the other record.

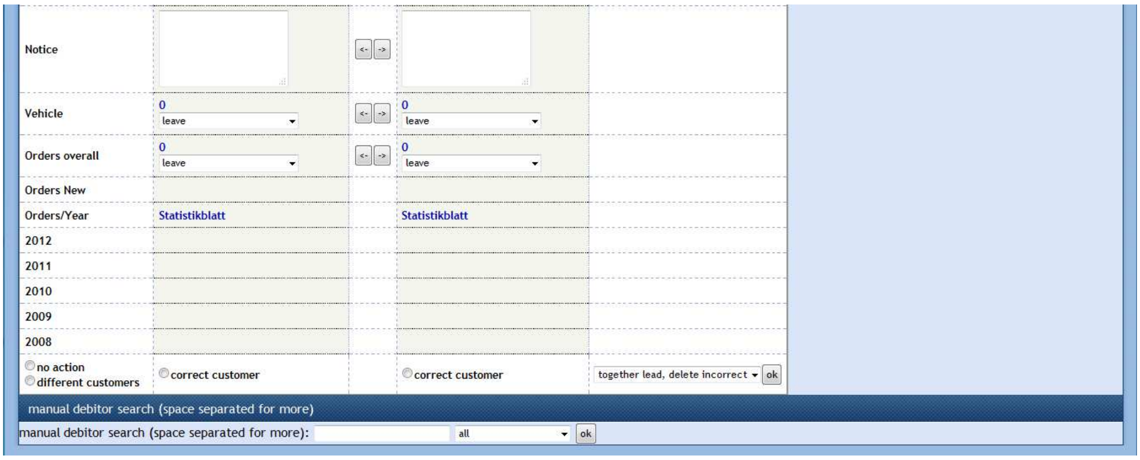


Fig. 16.9: Duplicate display - Vehicles / Invoices

At the bottom of the page, you can decide whether the records are different customers indeed or a relationship between them exists.

If you establish a relationship, this will be displayed under the additional information of the customer overview (including a link). In the vehicles, correspondence, and invoices tabs, all data from these sections for all related records will be displayed.

Even if there are more than two duplicates in the system for a given record, you must still compare two records together in the first place -although all duplicates are still represented side by side. CRM data is updated via the nightly import. Run an additional duplicate check before making further decisions on any customer.

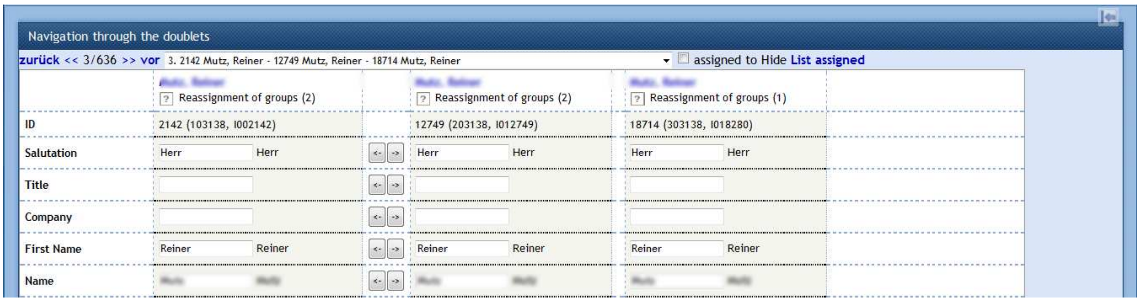


Fig. 16.10: Duplicate display – Two or more duplicate records

The company administrator can view all CRM assignments in a list. There, the administrator can trace which duplicates were edited by whom and what decisions were made.

Fig. 16.11: Duplicate display - List

Click on the red X to undo a duplicate assignment in CRM. However, any changes previously made to the master data still remain.

16.5.3 Duplicate export

Go to the menu item Duplicates export to create an Excel file containing the duplicate check records. These can be edited or sent as required.

16.6 Data import

In addition to the existing interfaces to other systems that are manually configured (if any), additional data from external files and databases can be imported.

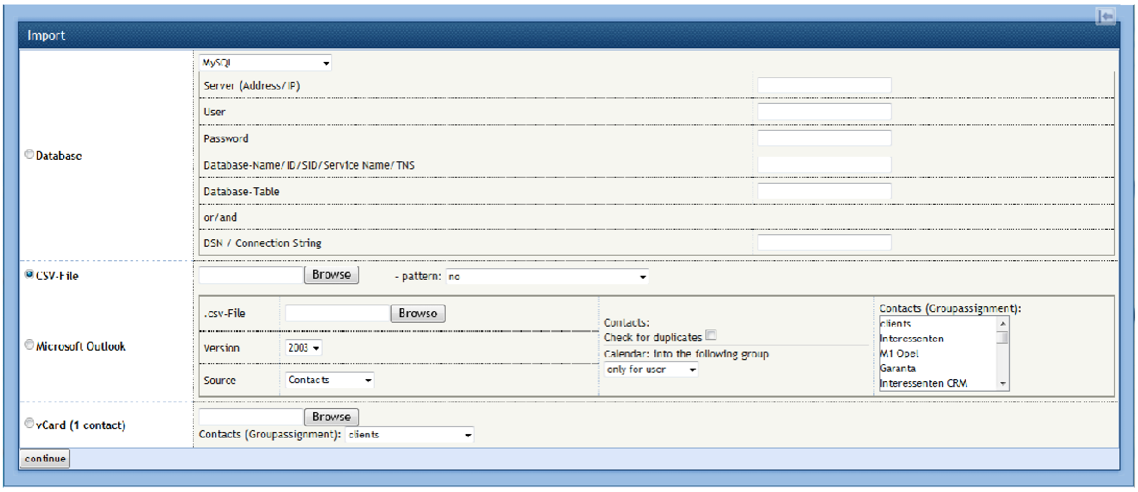


Fig. 16.12: Import

Data can be imported into the CRM system in the following ways:

16.6.1 Database / CSV file

Using the CSV file import function you can import customer data into CRM and massively add correspondence records for customers. Please note that a correct import of the resulting file requires the availability of all required fields (customer data such as address, telephone but also correspondence fields such as subject, date, and text). If the fields are not stored in the CSV file, they must be manually entered.

16.6.1.1 Mass-import of correspondence records

16.6.1.1.1 File preparation

Any customer contacts with external providers can be stored in a correspondence record in CRM. That being said, a successful import always requires a unique identifier such as the CRM ID, the debtor, or the chassis number/VIN, so that the correspondence entry can be properly assigned.

The last three columns of each table hold a header and the corresponding customer content (in this case, the fields E / F / G with the heading Subject / Description / Date).

	A	B	C	D	E	F	G
1	Id	Name	First name	Company	Subject	Discriptioi	Date
2	6871	Testfrau	Siegrid		Tire change	cover letter	07.09.2012
3	28685	Kaspar	Katja		Tire change	cover letter	07.09.2012
4	1006745			Sonnenklar G	Tire change	cover letter	07.09.2012
5	1006782	Sonnenscheii	Susi		Tire change	cover letter	07.09.2012
6	1006793	Profalla	Sabine		Tire change	cover letter	07.09.2012
7	1006795	Sonne	Susi		Tire change	cover letter	07.09.2012

Fig. 16.13: CSV Import - Creating the Table / Correspondence import

It is important to ensure that the file is saved in CSV format (setting *Save As / File Type*).

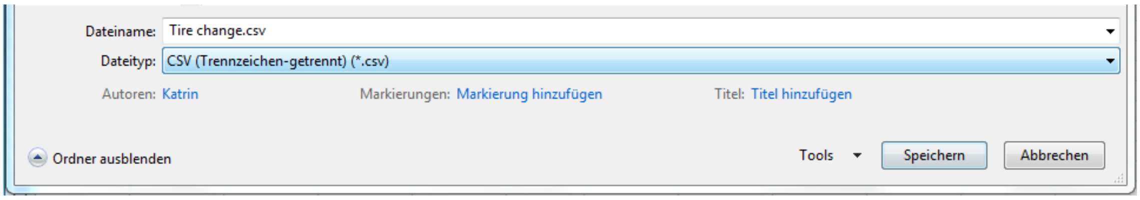


Fig. 16.14: CSV Import - Downloading the table

16.6.1.1.2 File import

Go to *Administration / Import* to upload the CSV file.

After selecting *CSV file*, you can search the file prepared in the table calculations using the *Browse ...* button. Click on *Next* to analyse the file. If the CSV file always has the same structure, you can select an existing template (if any).

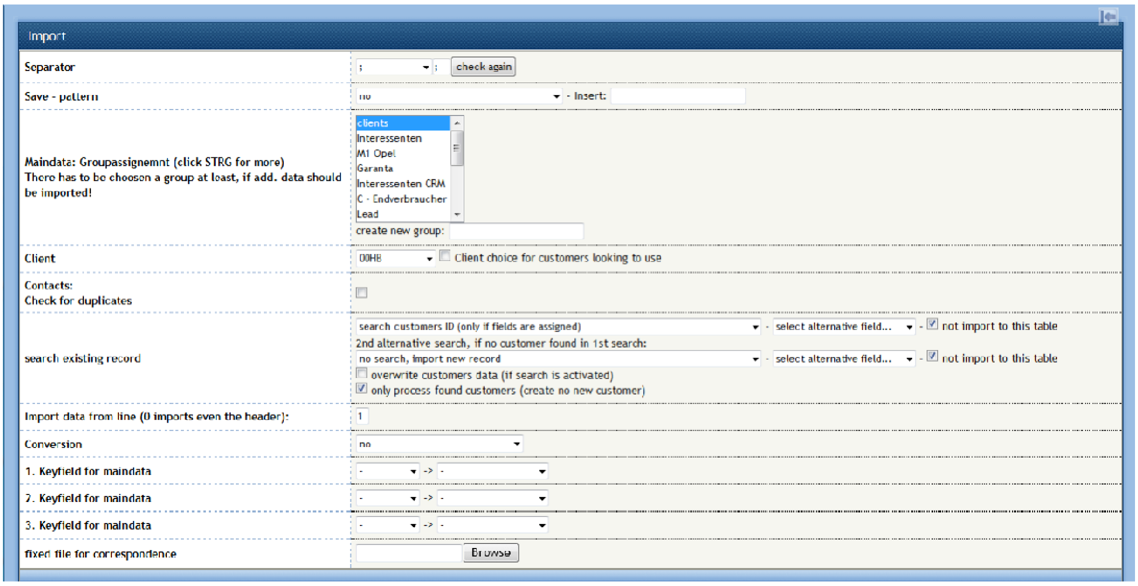


Fig. 16.15: CSV Import - Settings

Separator: Semicolon separated

Save - pattern:	Import settings templates can be stored and recalled for recurring imports.
Maindata:	Assign a record to an existing group or create a new one ATTENTION! Group assignment must be unconditional.
Client:	Assignment to a client / storage location These are only accessed upon new record creation.
Contacts:	Perform a duplicate check while importing the CSV file Search for exact spelling in the fields that were selected under *Search in existing records.*
Search existing record:	Set the search criteria for existing records; either by the default search criteria or by selecting *Search by another field,* defining the field *Select another search field.* For an unambiguous assignment, CRM ID, debtor / prospect number, or chassis number would be ideal. Alternative search option: selection in the second row of *First name, Last name or Business name and Post code (if assignment is selected),* while the second field remains blank. This serves to identify customer master similarities for known customers.
Not import in this table:	if checked, it only imports data matches. These are not created additionally in CRM.
Overwrite customer data:	Overwrite master data from field mapping in locating existing customers; only valid for new CRM prospects.
Only process found customers:	no entry of new records.
Import data from line:	Exclusion of the table header, for example.

Conversion: Conversion of incorrect umlauts in source files; by default, no conversion is performed.

Keyfields: Extension to *Search existing records*; Assignment of up to three CRM search fields which must simultaneously match the record data to find a customer (e.g., matchcode and name).

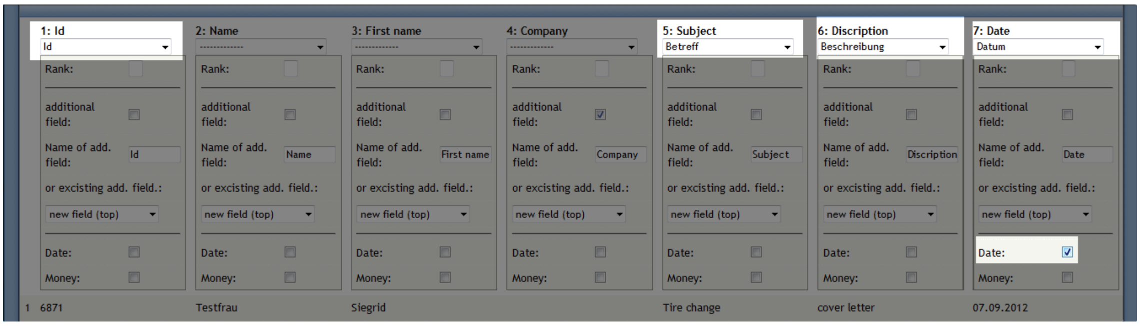


Fig. 16.16: CSV Import - Assignment / Correspondence import

Data field assignment: Selection of the appropriate table data to the corresponding CRM fields; a unique customer allocation is key; to ensure correct formatting, check date and numeric fields

If new fields are created, check the corresponding boxes as necessary. The name of the additional field is chosen either by the table header or manually entered.

Click on the button *Next* at the end of the page launch the import process.

The import is done in 100-record batches. During import, no other program function can be called as otherwise the import is cancelled.

To check imported data, choose the selected group on the top right; the customers will then be displayed in the list view. Provided customers have not been assigned to an existing group, the new group data are shown only upon the next login. Furthermore, customers can be filtered using the Filter Wizard using different criteria; in this case, the unique subject of the correspondence entry.

16.6.1.2 Mass-import of customer data

16.6.1.2.1 File preparation

All required data is stored in a table with a table header label.

	A	B	C	D	E	F	G
1	Name	First name	Company	street	house numb	zip	City
2	Testfrau	Siegrid		Sonnenstr.	1	14480	Potsdam
3	Kaspar	Katja		Löwenzahns	50	10143	Berlin
4			Sonnenklar (	Sternstr.	2	10117	Berlin

Fig. 16.17: CSV Import - Table creation / file import

If information is stored in two source file columns that will only fill one CRM field, a merge process is later introduced (here: Street and house number).

It is important to ensure that the file is saved in CSV format (setting *Save As / File Type)*.

16.6.1.2.2 File import

Go to *Administration / Import* to upload the CSV file.

Similarly to the correspondence entries import, the corresponding information is entered in the settings window.

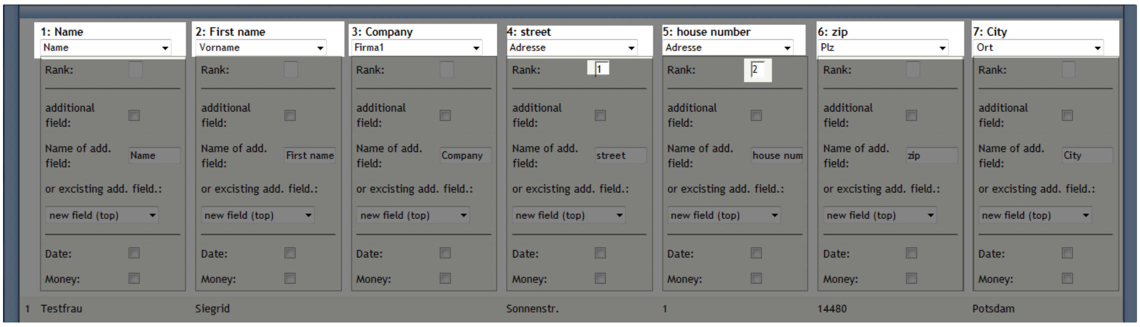


Fig. 16.18: CSV Import - Assignment / File import

The address field is made up (here) of street and house number as independent elements. In CRM, street and house number are merged into a single address field. Therefore, the field address is selected for both street and house number albeit with different ranks. Fields with entered ranks are inserted or updated in CRM combined with blank characters

Customers that do not match any existing customer will be created as new customers in the number range 900,000 - 1,000,000.

16.6.2 Outlook import

Before data can be imported from Outlook, you must export the data from Outlook in CSV format. CRM recognizes the format and imports the data. In the start screen, you can select the right version and type of data (contacts, calendar, or e-mail), as well as the group assignment. Likewise, it can be decided whether a duplicate check should be performed.

16.6.3 vCard

You can use the vCard format to import customers / prospect records (private / corporate). This file often has a VCF extension. If vCard import is selected, user the Browse button to find the file in your local PC. Furthermore, a client group must be specified so that the record is assigned to a group. After clicking on *Next,* the data is imported.