

Customer
Relationship
Management

2012

A guide to Customer Relationship Management in Horizon.

Horizon 3.348

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1. Introduction

Over the next couple of pages you will discover what all the different options within the Customer Relationship Management tool and how to add a action, user defined fields, personalised alerts and much more.



2. User Options

2.1 Login Options

Once CRM has been activated on your Horizon, you will have access to the CRM Login Specific Options on the Login.

To gain access to these login options you need to browse to:

Setup > Company > Logins > (Select A Login)

You will now notice an additional 'CRM Action Defaults', with the following options:

- Subject
This is the default 'Subject' that is set on an Action when created by the login.
- Reason
This is the default 'Reason' that is set on an Action when created by the login.
- Type
This is the default 'Type' that is set on an Action when created by the login.
- Alert Types
This is the default 'Alert Letter/Code' that is set on an Action when created by the login.
- User Defined Fields (UDF) Types
This is the UDF Types that the login is restricted to.
Note: If this is left blank users will be able to see all UDF Types. Otherwise it just needs to contain the letters of the UDF types they require to see.
(If it's a number of UDF types e.g. A, B and C you would list it as ABC)

2.2 Security Options

Once CRM has been activated on your Horizon, you will have access to the CRM Security Options on the Login.

To gain access to these security options you need to browse to:

Setup > Company > Logins > (Select A Login) > Define Security

You will now notice an additional tab 'CRM / Marketing', with the following options:

- CRM Actions
Allows the login to access the Actions screen to view their Actions
- CRM Actions Calendar
Allows the login to view their Actions in a Calendar
- CRM Allow Alerts
Allows the login to view Alerts on the Actions screen
- CRM Allow Alerts Setup
Allows the login to setup Alerts (Only works if has access to Management/Setup)
- CRM Allow Finalise Action
Allows the login to be able to complete Actions
- CRM Allow Reassignment of Action
Allows the login to reassign Actions to another login
- CRM Campaigns
Allows the login to view Campaigns
- CRM Default To Old Style Call Popup
Actions popup in the original 'Call Manager' style
Needs to be un-ticked when setting up a user to use Actions
- CRM Force Action Outcome
Forces the login to select a Outcome when creating an Action
- CRM Force Action Reason
Forces the login to select a Reason when creating a Action
- CRM Force Action Stage
Forces the login to select a Stage when creating a Action
- CRM Force Action Subject
Forces the login to select a Subject when creating a Action
- CRM Force Action Target Date
Forces the login to select a Target Date when creating a Action
- CRM Force Action Title
Forces the login to select a Title when creating a Action
- CRM Force Action Type
Forces the login to select a Type when creating a Action
- CRM Hide Management / Setup
Restricts the login not to have access to the Management / Setup Area
Needs to be un-ticked to allow access
- CRM Hide Overview
Restricts the login not to have access to the Management / Setup Area
Needs to be un-ticked to allow access
- CRM Prevent Modify Action History
Prevents the user from modifying the Action History Note

3. Management/Setup

The Management/Setup area is where all information is setup/modified to be used for the CRM module

Note: see section 2.2 Security Options to restrict access to the Management/Setup section.

3.1 User Defined Fields (UDF's)

3.1.1 Trader UDF's

The options/fields within the UDF section are as followed:

- Name (Description of the User Defined field)
- Data Type
 - Date (Allows you to select a date against the UDF)
 - Text (Allows you to enter text against the UDF)
 - Number (Allows you to enter a number against the UDF)
 - List (Allows you to create a list, which then enables you to then select from against the UDF)
- Priority (If a priority is set, the higher up the list the UDF is displayed)
- Type (If a type is set, Logins can be restricted to see this UDF)
- Required (if set the user will be made aware that the field is required, but won't force them to enter information)
- In Use (if set the UDF will be seen as in use, otherwise it won't be seen)

*Note: It is advised if you no-longer require a UDF to un-mark it as **In Use** because if you need the data in the future it will then still be present in the data.*

3.1.2 Contact UDF's

The options/fields within the UDF section are as followed:

- Name (Description of the User Defined field)
- Data Type
 - Date (Allows you to select a date against the UDF)
 - Text (Allows you to enter text against the UDF)
 - Number (Allows you to enter a number against the UDF)
 - List (Allows you to create a list, which then enables you to then select from against the UDF)
- Priority (If a priority is set, the higher up the list the UDF is displayed)
- Type (If a type is set, Logins can be restricted to see this UDF)
- Required (if set the user will be made aware that the field is required, but won't force them to enter information)
- In Use (if set the UDF will be seen as in use, otherwise it won't be seen)

*Note: It is advised if you no-longer require a UDF to un-mark it as **In Use** because if you need the data in the future it will then still be present in the data.*

3.2 List Values (Action Options)

The options/fields within the List Values are as followed:

- **Action Subject**
Pre-defined subjects available for selection for an Action
(e.g. Existing Business, New Business, Lead, Prospect Working On)
- **Action Reason**
Pre-defined reasons available for selection for an Action
(e.g. Account Review, Issue New Contract, Spend In Decline, Book Appointment)
- **Action Type**
Pre-defined types available for selection for an Action
(e.g. Telephone, Email, Visit)
- **Action Stage**
Pre-defined stages available for selection for an Action
(e.g. Quoting, Appointment Booked, Unable To Make Contact, In Discussions)
- **Action Outcome**
Pre-defined outcomes available for selection for an Action
(e.g. Account Opened, Follow Up Appointment Booked, Need To Improve Terms, Awaiting Call Back)

3.2.1 Adding a new List Value

To add a new option to one of the list values you need to:

1. Select one of the list value options.
2. Select the **Add** button.
3. Enter the name of the new entry
4. Select **Confirm**.

3.2.2 Deleting a List Value

To delete a option from one of the list values you need to:

1. Browse to the list value you wish to deleted and select it.
2. Select the **Delete** button.
3. Select **Yes** to confirm.

3.3 Alerts

The options/fields within the Alerts section are as followed:

- Name (Description of the Alert)
- Priority (If a priority is set, the higher up the list the Alert is displayed)
- Type (If a type is set, Logins can be restricted to see this Alert)
- In Use (if set the UDF will be seen as in use, otherwise it won't be seen)
*Note: It is advised if you no-longer require a UDF to un-mark it as **In Use** because if you need the data in the future it will then still be present in the data.*
- Edit SQL
 - SQL Query (Allows you to input a SQL query to bring back information you require about the customer.)
Note: When writing the script you need to define what columns you want to bring back. If you are bring back more than one column for the message you need to place them in the order they are to be displayed in the message.
 - Message (Allows you to create your message to include the information from the SQL script.)
Note: To include the information you need to place {} at each interval.
 - Image (Allows you to place a Image against the alert)

Example of Alerts:

Example 1

Display Last Ordered Date.

SQL Query:

```
select max(taxpoint_date) from entry e where entry_type='SORD' and e.trader_id = :trader_id
```

Message:

Last Order Date {}

Example 2

Display traders total paper sales value for the last 12 months based on Sales Invoices.

SQL Query:

```
select sum (d.total_goods) from entry e
join detail d on e.entry_id = d.entry_id
join product p on d.product_id = p.product_id
where e.entry_type = 'SINV' and e.age <= 11 and p.range_id = 10
```

Message:

Last 12 Months Paper Sales Value £{ }.

3.4 Settings

3.4.1 Default Campaign

You are able to set a default campaign against an action. At the moment this is just affectively for reporting use.

3.4.2 Importing Actions

You are able to import actions directly into Horizon.

This is useful for if you want to do a campaign to target specific customers based on Account Review, Issue New Contract, Spend In Decline, Book Appointment.

To Import actions, you need to:

1. Select **Actions** from the drop down box
2. Select **Go**
3. Select the **.xls** formatted file.
Note: It will now run through import the Actions into Horizon.
4. Select **OK** to the popup box once completed importing.

The file to import actions needs to be in the following format:

Column	Description	Example
A	Trader Code	BLUESKY
B	Contact Name	Michael Rawson
C	Action Subject	Stationery
D	Action Reason	Customer Service
E	Action Type	Issue New Contract
F	Action Due (Date and Time)	23/04/2012 15:00
G	Action Stage	Brand New
H	Target Date	27/04/2012
I	Assigned To	Mark Barnes
J	Title	New Contract
K	Priority	99
L	Initial Action Note	Imported by Nicky Kidd
M	Initial Outcome	Call Required
N	Prevent Popup (True or False)	False
O	Automatic Flag (True or False)	True
P	Campaign Name	Test
Q	Action Flag	A

A example file is available at request.

Note: Please be aware that all values inputted into the file need to match those in Horizon.

3.4.3 Importing Trader User Defined Field Information

You are able to import answers for your user defined fields (UDF's) directly into Horizon.

This is useful for if you have collected information from traders and now require to import into Horizon, or if you want to set a blanket value across all traders for a specific UDF.

To Import actions, you need to:

1. Select **Trader User Defined Fields** from the drop down box
2. Select **Go**
3. Select the **.xls** formatted file.
Note: It will now run through importing the information for the UDFs into Horizon.
4. Select **OK** to the popup box once completed importing.

The file to import actions needs to be in the following format:

Column	Description	Example
A	Trader Code	BLUESKY
B	Field Name	Sector
C	Value	Stationery

A example file is available at request.

Note: Please be aware that all values inputted into the file need to match those in Horizon.

3.4.4 Importing Contact User Defined Field Information

You are able to import answers for your user defined fields (UDF's) directly into Horizon.

This is useful for if you have collected information from customer and now require to import into Horizon, or if you want to set a blanket value across contacts for a specific UDF.

To Import actions, you need to:

1. Select **Contact User Defined Fields** from the drop down box
2. Select **Go**
3. Select the **.xls** formatted file.
Note: It will now run through importing the information for the UDFs into Horizon.
4. Select **OK** to the popup box once completed importing.

The file to import actions needs to be in the following format:

Column	Description	Example
A	Trader Code	BLUESKY
B	Field Name	Favourite Team
C	Value	Derby County
D	Contact Name	Michael Rawson

A example file is available at request.

Note: Please be aware that all values inputted into the file need to match those in Horizon.

3.4.5 Copy Action Description into an Action Note

It is possible to copy over the information in the Description field into an Action Note.

To do this all you need to do is select the **Copy call notes to action history** button.

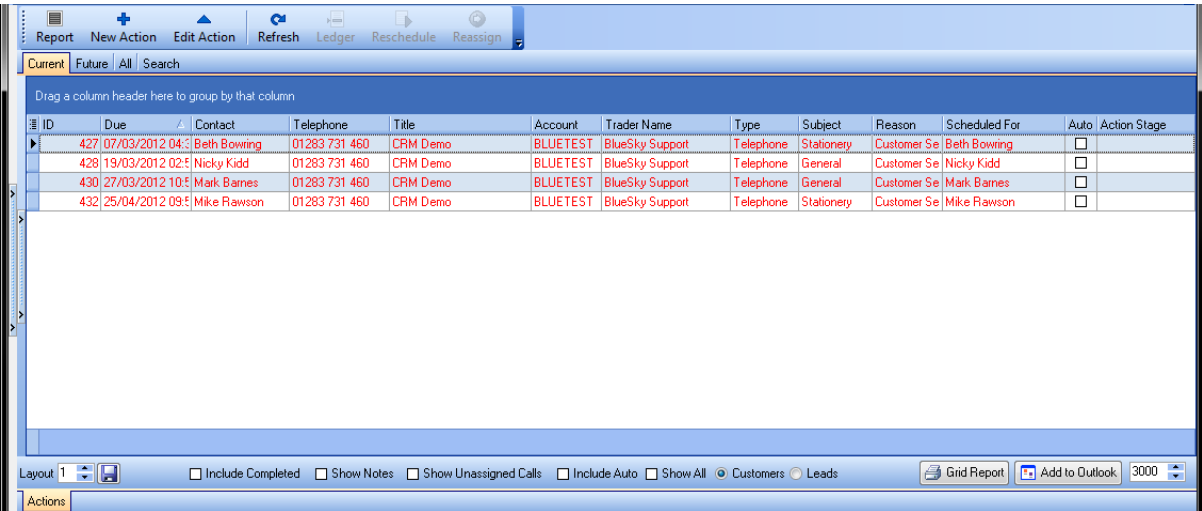
Note: It is advised to do this if you are new to the CRM Module and you have existing calls on the system. This is so all previous notes are logged into the Action History.

4. Actions

4.1 Actions Screen

The action section allows view all actions that currently exist in Horizon.

Note: see section 2.2 Security Options to restrict access to the Actions section.



4.1.1 Tabs and Their Meanings

There are 4 tabs you can select within the action screen:

- Current (Displays all actions due on or before the current date.)
- Future (Displays all actions due after the current date.)
- All (Displays all actions.)
- Search (Displays all actions depending on Search Criteria.)

4.1.2 Selection Options

You can also select from the following options to bring back more actions:

- Include completed (Displays completed calls)
- Show Notes (Displays the Actions Description)
- Show Unassigned Actions (Displays actions that have not been assigned to a user)
- Include Auto (Displays any actions that have been created through Command Centre)
- Show All (Displays all actions)
- Select between Customers (Displays Internal, Sales and Sales Delivery Actions) and Leads (Displays Internal, Sales Leads and Web Leads).

4.1.3 Rescheduling Actions

You can reschedule actions to another time individually or on mass.

1. On the screen you can then select multiple actions by selecting the top action, holding the shift key and then selecting the action you wish the selection to go to.
2. Select the **Reschedule** option.
3. Fill in the date and time you wish to reschedule the actions for.
4. Select **OK**.

4.1.4 Reassigning Calls

You can reassign actions to another user individually or on mass.

1. On the screen you can then select multiple actions by selecting the top action, holding the shift key and then selecting the action you wish the selection to go to.
2. Select the **Reassign** option.
3. Select the user you wish to reassign the actions to.
4. Select **OK**.

4.2 Action (Pop-up) Screen

The screenshot shows the 'Process Action' window with the following sections:

- Action Details:**
 - Action Title: CRM Demo
 - Action ID: 5
 - Action Description: (empty)
 - Automatic: ☐
 - Prevent PopUp: ☒
 - Action Flag: E
 - Campaign Name: (empty)
 - Action Subject: Existing Business
 - Assigned To: EG Support
 - Action Reason: Account Review
 - Action Value: (empty)
 - Action Type: Telephone
 - Priority: 0
 - Target Date: 22/11/2012
- Shortcuts:**
 - Trader Ledger, Credit Control, Raise Quote, Raise Order, Raise SRTN
 - Reports, Gap Analysis, Quotes/Contracts, Sales History, Trader Notes
 - ENTER CODE, Quick Price, Check Stock, Stock Card
- Action Status:**
 - Next Due: 15/11/2012 13:25:51
 - Action Stage: In Discussions with Customer
 - Action Complete: ☐
 - Buttons: Append Action Note, Add Action Note, Save and Exit
- Action History:**

Date	Create By	Stage	Outcome	Reason	Contact
(Empty table body)					
- Customer:**

EQI_BLUESKY	Credit Limit	0.00
EQI Bluesky	Balance	0.00
Chatsworth Court	Status	Normal
Alpha House	Rep	WEB
Uttlesford Road	Type	S
Hilton	Last Paid	
DE65 5GE	Last Ordered	20/09/2012 14:51
- Contact:**

Name	Mike Rawson	Notes
Email	mrawson@ecpsolutions.com	
Telephone	01283 731 460	Allow eMarketing <input checked="" type="checkbox"/>
Fax	01283 731 475	Allow Tele Sales <input checked="" type="checkbox"/>
Job Title	Support	Allow Mailshots <input checked="" type="checkbox"/>
		Allow Fax <input checked="" type="checkbox"/>
		In Use <input checked="" type="checkbox"/>
- Alerts:**

Message	Type
(Empty table body)	
- User Defined Fields:**
 - Groups: All Trader Actions
 - Groups: All Contact Actions

The main Action (pop-up) screen is split up into 7 different areas.

- Action Details
- Shortcuts
- Action Status
- Action History
- Customer
- Contact
- Alerts

4.2.1 Action Details

Action Details			
Action Title	CRM Demo	Action ID	5
Action Description		Automatic	<input type="checkbox"/>
		Prevent Popup	<input checked="" type="checkbox"/>
		Action Flag	E
Campaign Name		Action Subject	Existing Business
Assigned To	ECi Support	Action Reason	Account Review
Action Value		Action Type	Telephone
Priority	0	TargetDate	22/11/2012

The Action Details stores the following information:

- | | |
|----------------------|---|
| • Action Title | <i>Short Description for what the Action is about</i> |
| • Action Description | <i>Full Description for what the Action is about</i> |
| • Campaign Name | <i>Campaign assigned to the Action</i> |
| • Assigned To | <i>User that the Action is currently assigned to</i> |
| • Action Value | <i>Value that the Action cost to the customer</i> |
| • Priority | <i>Priority of the Action</i> |
| • Action ID | <i>ID of the Action</i> |
| • Automatic | <i>If ticked the Action was created Automatically by Command Centre</i> |
| • Prevent Popup | <i>If ticked the Action will not popup</i> |
| • Action Flag | <i>Action Flag</i> |
| • Action Subject | <i>Action Subject</i> |
| • Action Reason | <i>Action Reason</i> |
| • Action Type | <i>Action Type</i> |
| • Target Date | <i>Target Date for completion</i> |

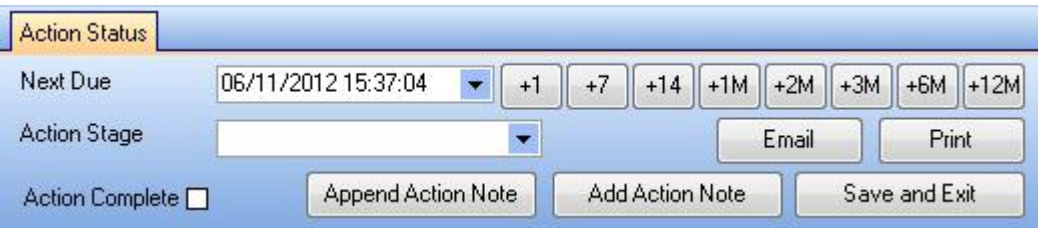
4.2.2 Shortcuts



The Shortcuts section allows quick access to:

- **Trader Ledger** *Access to the traders ledger card*
- **Reports** *Run any trader reports*
- **Credit Control** *Access to the Credit Control section on the Trader Card*
- **Gap Analysis** *Access to the Gap Analysis on the Trader Card*
- **Quotes/Contracts** *Access to the Quotes/Contracts tab on the Trader Card*
- **Sales History** *Access to the Sales History screen*
- **Trader Notes** *Access to the Trader Notes screen*
- **Raise Sales Quote** *Creates a Sales Quote*
- **Raise Sales Order** *Creates a Sales Order*
- **Raise Sales Return** *Creates a Sales Return*
- **Quick Price** *Enter a code and select **Quick Price** it will bring back the customers Price.*
- **Check Stock** *Enter a code and select **Check Stock** it will bring up the Enquiry screen to enquire at your suppliers.*
- **Stock Card** *Enter a code and select **Stock Card** it will bring up the Stock Card for that code.*

4.2.3 Action Status



The Action Status section allows quick access to:

- **Next Due** *Due date for the Action to pop-up*
- **Action Stage** *Current stage of the Action*
- **Action Complete** *Action complete flag (**Always select to complete an Action**)*
- **Email** *Shortcut to send an Email*
- **Print** *Shortcut to print any Action reports*
- **Append Action Note** *Allows you to add an additional note onto an existing note.*
- **Add Action Note** *Add an Action Note*
- **Save and Exit** *Save and Exit (**Always select when exiting an Action**)*

4.2.4 Action History

Action History Audit					
Date	Create By	Stage	Outcome	Reason	Contact
15.11.2012 11:56 AM	Sales Office Standard	Unable to make contact	Awaiting call back	Customer Service	Mark Barnes
Unable to make contact with the customer as they are on annual leave.					
Customer is back in tomorrow, will reschedule the call for tomorrow.					

The Action History displays all previous Notes associated to the Action. These details include:

- Date *Date the Note was added*
- Created By *User that entered the Note*
- Stage *Stage selected against the Note*
- Outcome *Outcome selected against the Note*
- Reason *Reason selected against the Note*
- Contact *Customer Contact selected against the Note*
- Note *Information that was entered into the Note*

*Note: If you have security option **CRM Prevent Modify Action History** un-ticked, to modify the Action Note all you need to do is double click on the Note to modify it.*

4.2.5 Customer Details

Customer			
ECI_BLUESKY	Credit Limit	0.00	
ECi Bluesky	Balance	0.00	
Chatsworth Court	Status	Normal	
Alpha House	Rep	\WEB	
Uttoxeter Road	Type	S	
Hilton	Last Paid		
DE65 5GE	Last Ordered	20/09/2012 14:51	

The Customer section shows the following Details:

- Address *Customer Address*
- Credit Limit *Credit Limit value*
- Balance *Customer Balance*
- Status *Credit Control Status*
- REP *Rep*
- Trader Type *Trader Type*
- Last Ordered *Last Ordered Date*
- Last Paid *Last Paid Date*

User Defined Fields

Groups

All Trader Actions

Name	Value	Required
White Collar Workers	10	<input type="checkbox"/>

The User Defined Field section shows the following Details:

- Name *Name of your user defined field*
- Value *Enter/Select value required.*
- Required *Required value*

*Note: When you enter any values always remember to select **Save and Exit** when closing the action screen.*

User Defined Fields

Groups

All Trader Actions

☐ General Accounts ☐ £30 Min Order
☐ Internet Only
☒ Major Accounts
☐ £10 Min Order
☐ £20 Min Order

Set Groups

The Groups section shows all trader groups available to assign against the trader.

*Note: If you select / unselect any groups against the trader always select **Set Groups** to confirm the changes.*

User Defined Fields

Groups

All Trader Actions

ID	Call Details	Assigned	Call On	Created	Comp
410	CRM Demo	Neil Sharples	16.08.2011	16.08.2011	<input type="checkbox"/>
427	CRM Demo	Michael Rawson	07.03.2012	07.03.2012	<input type="checkbox"/>
428	CRM Demo	Michael Rawson	19.03.2012	12.03.2012	<input type="checkbox"/>
430	CRM Demo	Michael Rawson	27.03.2012	13.03.2012	<input type="checkbox"/>
432	CRM Demo	Michael Rawson	25.04.2012	25.04.2012	<input type="checkbox"/>
433	CRM Demo	BlueSky Support	25.04.2012	25.04.2012	<input type="checkbox"/>

The **All Trader Actions** screen shows all actions on the system for that trader.

Note: If you double click on an Action it will pop-up with that Actions details.

4.2.6 Contact Details

Contact

Name

Mark Barnes

Email

markb@blueskysoft.co.uk

Telephone

01283 731 460

Fax

01283 731 475

Job Title

Edit / Add

Notes

Allow eMarketing

☒

Allow Tele Sales

☐

Allow Mailshots

☐

Allow Fax

☒

In Use

☒

The Contact section shows the following Details:

- Name

Customer Contact assigned to the action. Using the drop down box you are able to change who the call is assigned to at the customer.
- Email

Contacts email address
- Telephone

Contacts telephone number
- Fax

Contacts fax number
- Job Title

Contacts Job Title
- Edit / Add

Pops up the Contact Card so you can edit any details or add in a new contact onto the trader.
- Notes

Pops up the Contact Card on the Notes section so you can add/edit any contact notes.
- Allow eMarketing

Flag to show whether the contact allows eMarketing
- Allow Tele Sales

Flag to show whether the contact allows Tele Sales
- Allow Mailshots

Flag to show whether the contact allows Mailshots
- Allow Fax

Flag to show whether the contact allows Fax
- In Use

Flag to show whether the contact is in use

User Defined Fields

Groups

All Contact Actions

Name	Value	Required
Favourite Football Team	Stoke City	<input type="checkbox"/>

The User Defined Field section shows the following Details:

- Name

Name of your user defined field
- Value

Enter/Select value required.
- Required

Required value

Note: When you enter any values always remember to select **Save and Exit** when closing the action screen

User Defined Fields

Groups

All Contact Actions

☐ Credit Controller

☒ Decision Makers

☐ Facilities Managers

☐ Machine Supervisor

☐ Web Admin Users

Set Groups

The Groups section shows all contact groups available to assign against a contact.

*Note: If you select / unselect any groups against a contact always select **Set Groups** to confirm the changes.*



User Defined Fields	Groups	All Contact Actions		
Call Details	Call On	Call By	Complete	Freq
CRM Demo	27.03.2012	Michael Rawson	<input type="checkbox"/>	
CRM Demo	25.04.2012	Michael Rawson	<input type="checkbox"/>	
CRM Demo	25.04.2012	Michael Rawson	<input type="checkbox"/>	

The **All Contact Actions** screen shows all actions on the system for the contact selected against the action.

Note: If you double click on an Action it will pop-up with that Actions details.

4.2.7 Alerts

Alerts

Message	Type
 Last Order Date 29/03/2012	
 Paper Sales Value £ 110.96	

The Alerts section shows all alerts that are available for the login to view.

Note: see section 2.1 Login Options on restricting Logins to specific Alerts.

4.3 Creating an Action

- 1. From with the Action screen press the **New Action** option.

This will present you with the following screen to select the trader:

Create new action - Select Trader

ECI_BLUESKY Search ☒ Customers ☐ Suppliers ☐ Leads

Please enter a search phrase from - Trader Code, Trader Name, Reference, Town, Post code or Telephone No

Code	Name	Ref	Line 1	Line 2	Line 3	Town	County	Post Code	Telephone	Type	Rep Co
ECI_BLUESKY	ECI Bluesky		Chatsworth Court	Alpha House	Ullowater Road	Hilton	Derbyshire	DE65 5GE		S	WEB

Filter above results by Filter Cancel Next

- 2. Search for the trader you wish to create the Action for.

You can search on the following details:

- Trader Code
- Trader Name
- Reference
- Town
- Post Cost or
- Telephone Number

You can also define if you want to specifically look for:

- Customers
- Suppliers and/or
- Leads

- 3. Select **Next** to confirm your Trader selection.

This will present you with the following screen to select the contact:

The screenshot shows a window titled "Create new action - Select Contact". It features a table of contacts for "ECi Bluesky".

Name	Salut	Tel.	Fax	Email	Job Title	Branch	Name
Mark Barnes	Mark	01283 731 460	01283 731 475	mbarnes@ecisolu	Support	ECI_BLUESKY	ECi Bluesky
Mike Rawson	Mike	01283 731 460	01283 731 475	mrawson@ecisolu	Support	ECI_BLUESKY	ECi Bluesky
Dan McCartin	Dan	01283 731 460	01283 731 475	dmccartin@ecisolu	Support	ECI_BLUESKY	ECi Bluesky
Kerry Pearce	Kerry	01283 731 460	01283 731 475	kpearce@ecisolu	Support	ECI_BLUESKY	ECi Bluesky
Nicky Kidd	Nicky	01283 731 460	01283 731 475	nkidd@ecisolu	Manager	ECI_BLUESKY	ECi Bluesky
Beth Bowring	Beth	01283 731 460	01283 731 475	bbowring@ecisolu	Support	ECI_BLUESKY	ECi Bluesky

Below the table is a "Call Details" section with fields for "Call On" (15.11.2012 01:09 PM), "Call By" (Sales Office Standard), "Complete" (checkbox), and "Freq". To the right are dropdowns for "Action Subject", "Action Reason", and "Action Type", along with checkboxes for "Action Flag" (My Actions Only, Show Complete) and a "Save as Default" button. At the bottom are buttons for "Filter", "New", "Back", and "Next".

Note: you are now able to view all contacts actions when adding a new action. It also allows you to filter those actions on whether they are active or complete,

- 4. Select the contact from the list that the Action is for.

If the contact does not exist you can select **New** to add a contact onto Horizon.

- 5. Select **Next** to confirm your Contact selection.

This will present you with the following screen to select the details of the action:

The screenshot shows a window titled "Create new action - Finish". It displays details for "ECI_BLUESKY - ECi Bluesky - Mike Rawson - 01283 731 460".

Assigned To: Sales Office Standard (dropdown) Enter the internal user who will process this Action

Action Subject: (dropdown) *

Action Reason: (dropdown) *

Action Type: (dropdown) *

Action Title: (text field) * Enter a brief title for this Action

Action Date / Time: 15/11/2012 13:26:51 (dropdown) +1 +7 +14 +1M +2M +3M +6M +12M Set Date / Time at which the Action is to become due.

Target Date: (dropdown) * Set Date / Time for estimated completion of this Action

Priority: 0 (spin box)

Action Stage: (dropdown) * Enter an initial sales funnel stage

Prevent Popup: ☐ Set to prevent Action popup when Due Date / Time is reached

Action Flag: ☐ *

* Compulsory Field

Buttons: Back, Finish

Note: see section 2.1 Login Options on setting default options for Action Subject, Action Reason, Action Type and Action Flag.

Note: see section 2.2 Security Options to set compulsory Fields.

- 6. Fill in the details for the Action.

- 7. Select **Finish**.

4.4 Adding a Note onto a Action

To add a note onto a Action you need follow these instructions:

1. Select **Add Action Note**.

It will then popup with the **Add Action Note** screen.

Add Action Note

Enter Note

Unable to make contact with the customer as they are on annual leave.
Customer is back in tomorrow, will reschedule for tomorrow.

Next Due: 16/11/2012 13:30:00 [dropdown] +1 +7 +14 +21 +1M +2M +3M +6M

Action Stage: In Discussions with Customer [dropdown]

Action Outcome: Awaiting call back [dropdown]

Action Reason: Customer Service [dropdown]

Contact: Mark Barnes [dropdown]

Cancel Save

2. Enter a Note
3. Select the Next Due Date
4. Select a Action Stage
5. Select a Action Outcome
6. Select a Action Reason
7. Select the Customers Contact you spoke to
8. Select **Save** to confirm
9. To then close the Action screen press **Save and Exit**.

4.5 Alter an Existing Action Note

To modify an Action Note you need follow these instructions:

- 1. Select the note you wish to modify

It will then popup with the **Add Action Note** screen with the selected Notes Details.

Add Action Note

Enter Note

Unable to make contact with the customer as they are on annual leave.
Customer is back in tomorrow, will reschedule for tomorrow.

Next Due

16/11/2012 13:30:00

+1

+7

+14

+21

+1M

+2M

+3M

+6M

Action Stage

In Discussions with Customer

Action Outcome

Awaiting call back

Action Reason

Customer Service

Contact

Mark Barnes

Cancel

Save

- 2. Amend the Action Note details
- 3. Select **Save** to confirm

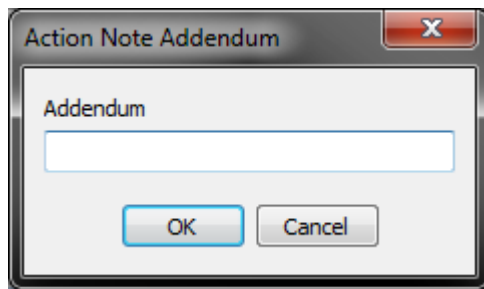
Note: see section 2.2 Security Options to restrict access to modifying existing Action Notes.

4.6 Append an Existing Action Note

To add a note to an existing Action Note you need follow these instructions:

1. Select the note you wish to modify
2. Select the **Append Action Note** button

It will then popup with the **Action Note Addendum** screen.



3. Enter the text you wish to add to the Action Note.
4. Select **OK** to confirm

4.7 Complete an Action

To complete an Action you need follow these instructions:

1. Select the **Complete** tick box.
2. Select **Save and Exit**.

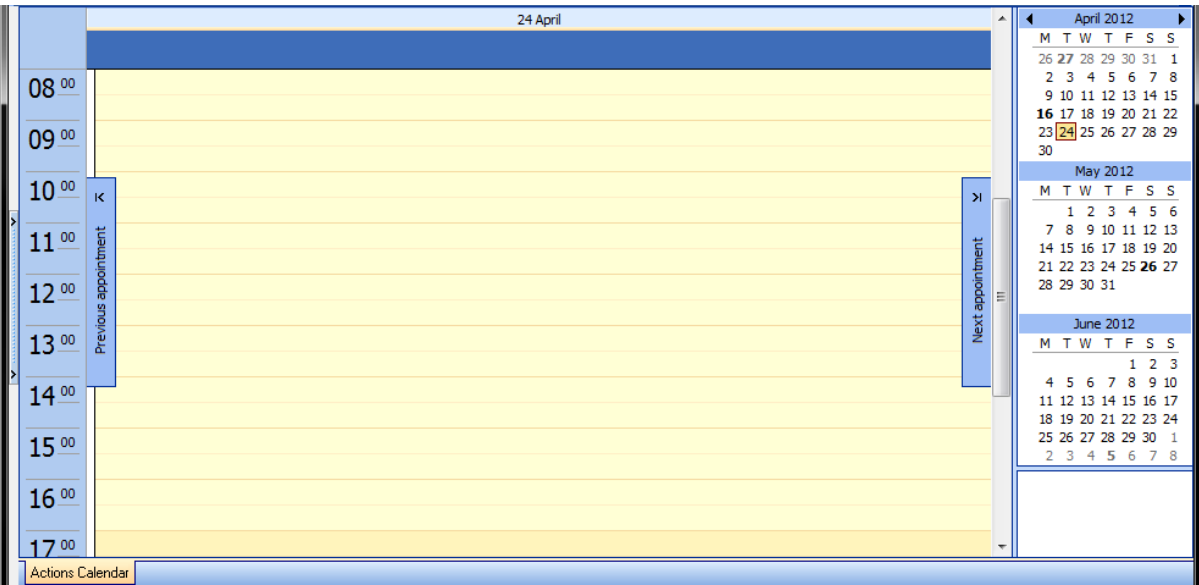
5. Actions Calendar

5.1 Actions Calendar Screen

The Actions Calendar displays calls that are in Horizon for the day select that are assigned to your login.

By default when you open the calendar it will open to today’s date.

Note: see section 2.2 Security Options to restrict access to the Actions Calendar section.



5.2 No Actions Displayed

If there are no actions on Horizon for the current date (or date you have selected) you will be displayed with options to either select from **Previous Appointment** (will take you to the previous action processed) or **Next Appointment**. (will take you to your next action due)

5.3 Changing the Date

You are able to select a day from the calendar to view actions that are on Horizon for that day.

Note: If the date is bold in the calendar there are actions in Horizon for that date.

6. Overview

6.1 Overview Screen

The overview section allows you to search for all sales customers (Sales Customers, Sales Delivery Branches, Sales Leads and also Web Leads) based on your search criteria.

A screenshot of a software interface titled 'Traders'. It contains various search criteria fields: 'Code', 'Name', 'Ref', 'Tel.', 'Fax', 'Area', 'Rep', 'Postcode', 'Town', 'Include' (with sub-options: All Types, Customers, Sales Leads, Web Leads), 'All Account Managers', 'All Rep Managers', 'All Rep Names', 'Groups' (with sub-options: General Accounts, Internet Only, Major Accounts, Support Test, £10 Min Order, £20 Min Order, £30 Min Order), 'Campaign' (with sub-options: Mikes Test Campaig, New Campaign), 'Hide inactive', 'Action Flag', 'On Stop', 'Queried', 'Normal', 'Include Branches', 'Clear', 'Search', and 'Create Action'.

You are able to base your search criteria on:

- Code
- Name
- Reference
- Telephone
- Fax
- Area
- Rep Code
- Post Code
- Town
- Trader Type (All Types, Customers, Sales Leads, Web Leads)
- Account Manager
- Rep Manager
- Rep Name
- Trader Group
- Campaign

Once you have filled in your criteria you need to select the **Search** option.

If at any point you need to clear the criteria you've entered just select the **Clear** option.

Note: see section 2.2 Security Options to restrict access to the Overview section.

The search information is then displayed in grid as seen below,

Code	Name	Line 1	Town	Type	Rep	Area	Account Manager	Rep Manager	Live Actions	Complete Actions	Last Note Date	Next Action	Spend 12 M	Last Ordered
BLUETEST	BlueSky Support	Chatsworth Court	Hilton	S	NS01		BlueSky Support		4	0	13.03.2012 11:01 AM	16.08.2011 11:46 AM	3725.06	29.03.2012 01:45

Actions Overview

The information you can see in the grid is:

- Trader Code
- Trader Name
- 1st Line of the Address
- Town
- Sales Contacts Tel. Number
- Trader Type
- Rep Code
- Area
- Account Manager
- Rep Manager
- Live Actions
- Complete Actions
- Last Note Added To An Action
- Next Action Due
- 12 Month Spend
- Last Ordered Date

6.2 Creating Actions from the Overview section

Horizon allows you to create actions on bulk from the Overview screen.

By using the search criteria you can search for the traders you wish to create actions for based on e.g. Group they are assigned to, recent campaign that's been ran, account manager.

1. On the screen you can then select multiple traders by selecting the top user, holding the shift key and then selecting the trader you wish the selection to go to.
2. Select the **Create Action** option.
This will then bring up the **Create New Action** screen.

*Note: see section 2.1 Login Options on setting default options for **Action Subject**, **Action Reason**, **Action Type** and **Action Flag**.*

Note: see section 2.2 Security Options to set compulsory Fields.

3. Fill in the details for the actions.
The details entered will be applied to all calls created.
*Note: By default they will be created to the traders **Sales Contact**.*
4. Select **Finish**.