Customer Relationship Management

2012

A guide to Customer Relationship Management in Horizon.

Horizon 3.348

Contents

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.

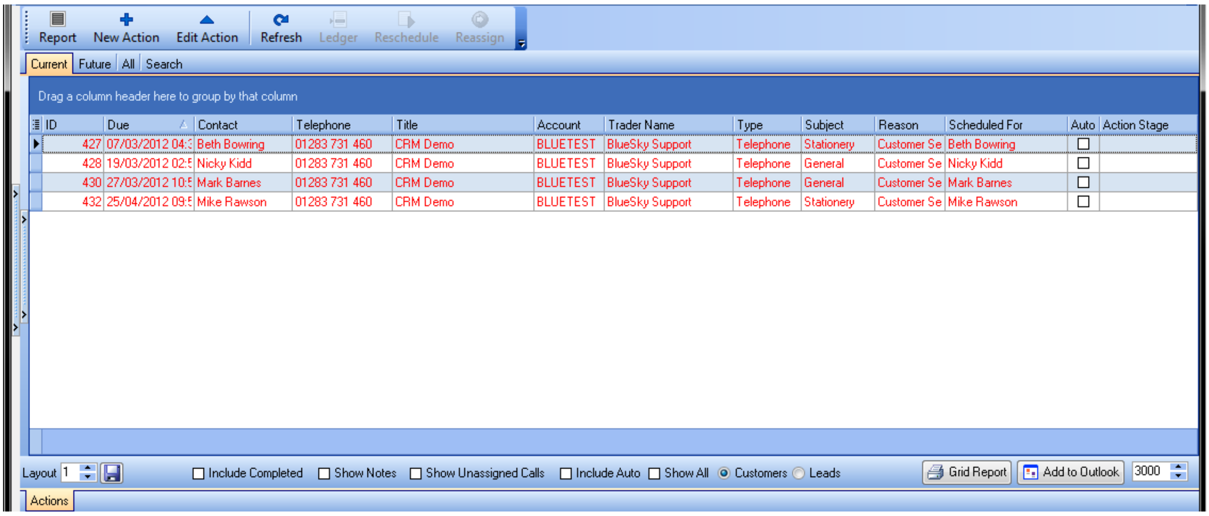
Note: It is advised to do this if you are new to the CRM Module and you have existing calls on the system. This is so all previous notes are logged into the Action History.

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.

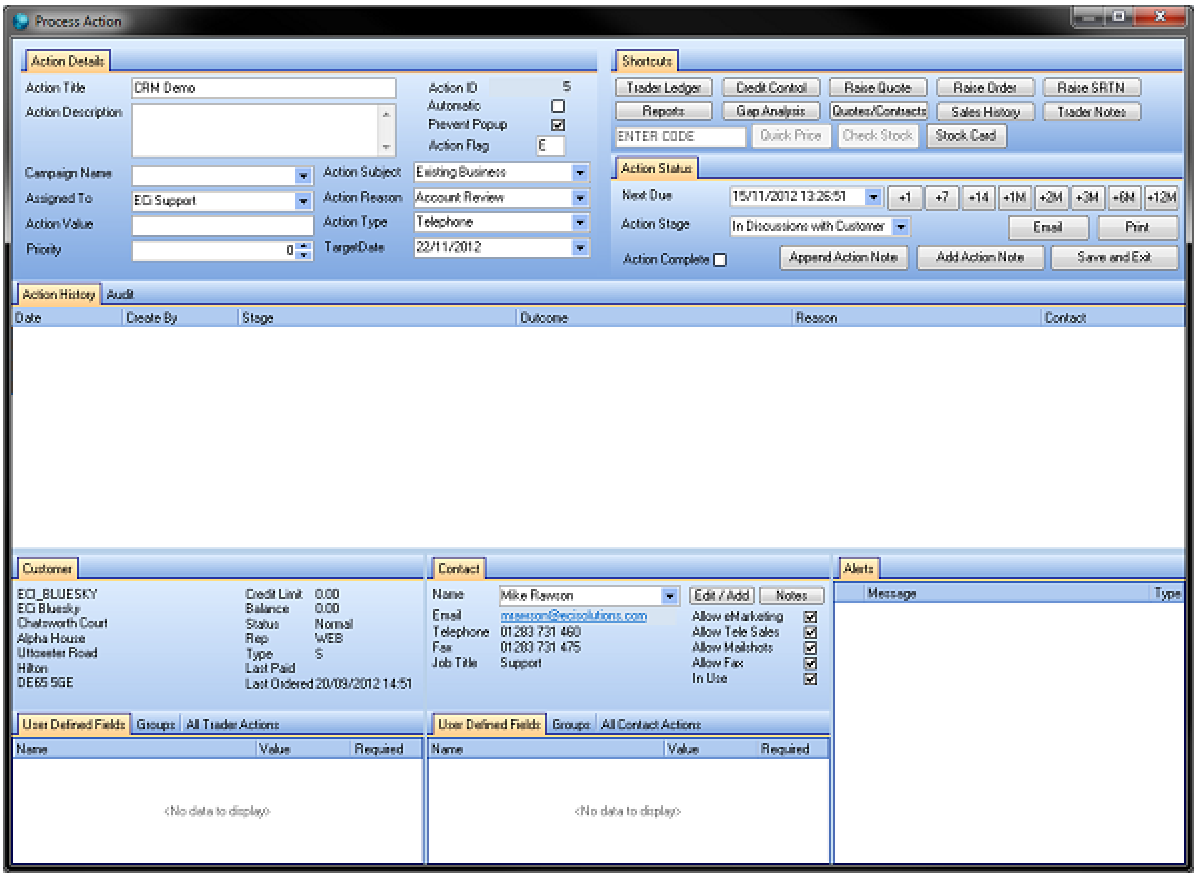
1. On the screen you can then select multiple actions by selecting the top action, holding the shift key and then selecting the action you wish the selection to go to.
2. Select the **Reschedule** option.
3. Fill in the date and time you wish to reschedule the actions for.
4. Select **OK**.

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**.

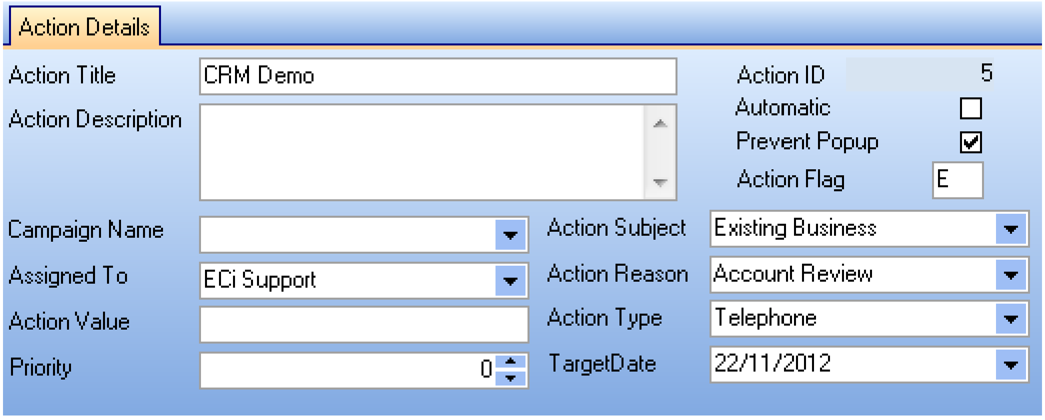
4.2 Action (Pop-up) Screen



The 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



The Action Details stores the following information:

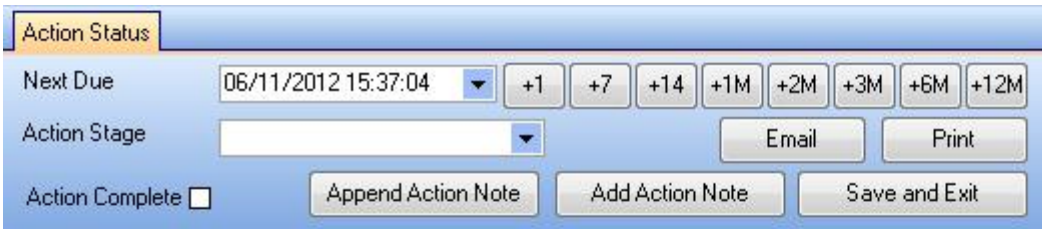
- Action Title *Short Description for what the Action is about*
- Action Description *Full Description for what the Action is about*
- Campaign Name *Campaign assigned to the Action*
- Assigned To *User that the Action is currently assigned to*
- Action Value *Value that the Action cost to the customer*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

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.*

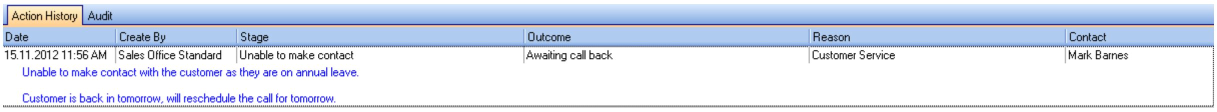
4.2.3 Action Status



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

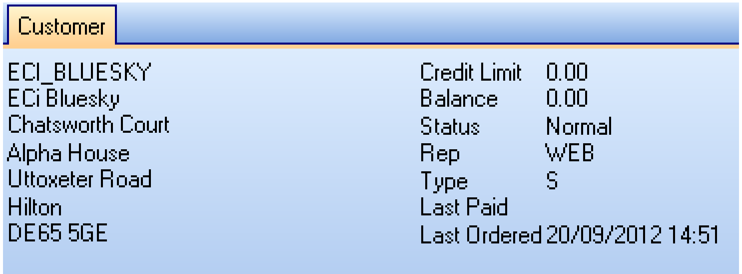


The Action History displays all previous Notes associated to the Action. These details include:

- 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*

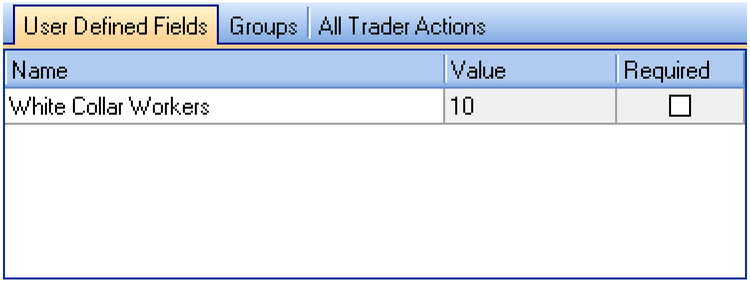
Note: If you have security option **CRM Prevent Modify Action History** un-ticked, to modify the Action Note all you need to do is double click on the Note to modify it.

4.2.5 Customer Details



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*

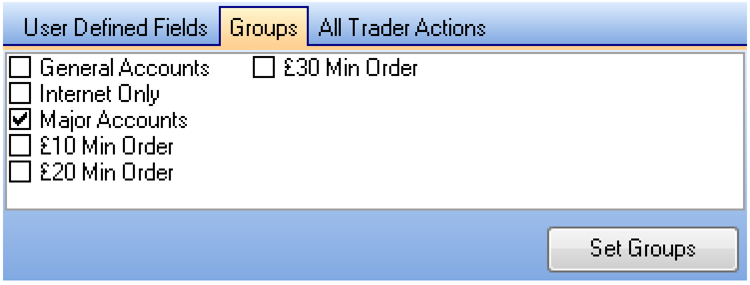


Name	Value	Required
White Collar Workers	10	☐

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.*



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

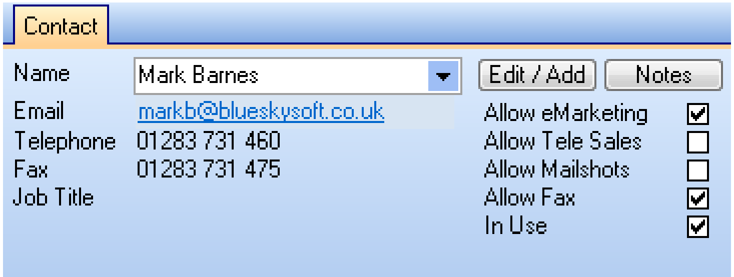
*Note: If you select / unselect any groups against the trader always select **Set Groups** to confirm the changes.*

ID	Call Details	Assigned	Call On	Created	Comp
410	CRM Demo	Neil Sharples	16.08.2011	16.08.2011	☐
427	CRM Demo	Michael Rawson	07.03.2012	07.03.2012	☐
428	CRM Demo	Michael Rawson	19.03.2012	12.03.2012	☐
430	CRM Demo	Michael Rawson	27.03.2012	13.03.2012	☐
432	CRM Demo	Michael Rawson	25.04.2012	25.04.2012	☐
433	CRM Demo	BlueSky Support	25.04.2012	25.04.2012	☐

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

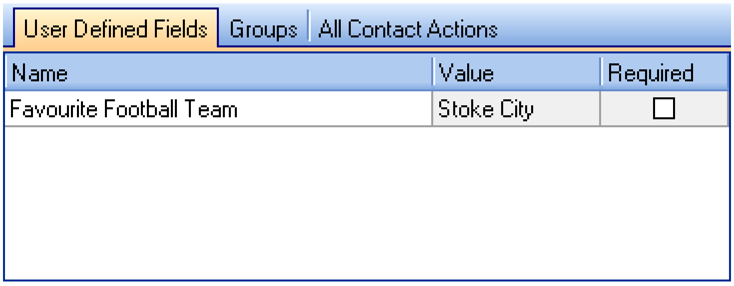
Note: If you double click on an Action it will pop-up with that Actions details.

4.2.6 Contact Details



The Contact section shows the following Details:

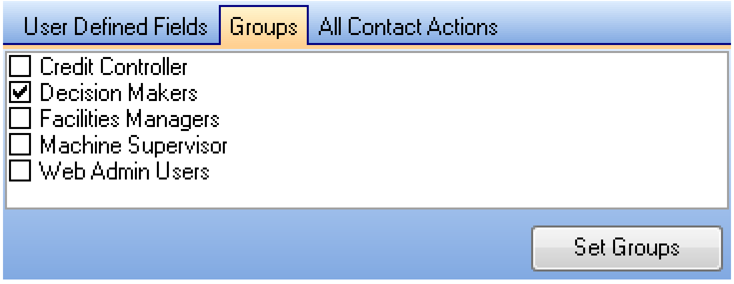
- Name *Customer Contact assigned to the action. Using the drop down box you are able to change who the call is assigned to at the customer.*
- Email *Contacts email address*
- Telephone *Contacts telephone number*
- Fax *Contacts fax number*
- Job Title *Contacts Job Title*
- Edit / Add *Pops up the 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*



The User Defined Field section shows the following Details:

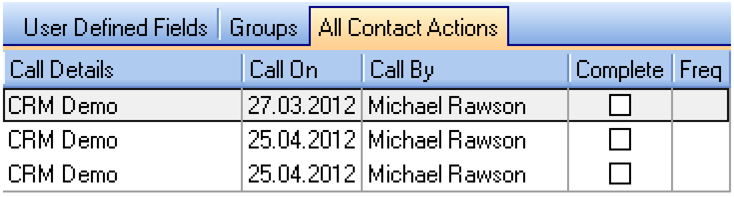
- Name *Name of your user defined field*
- Value *Enter/Select value required.*
- Required *Required value*

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



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

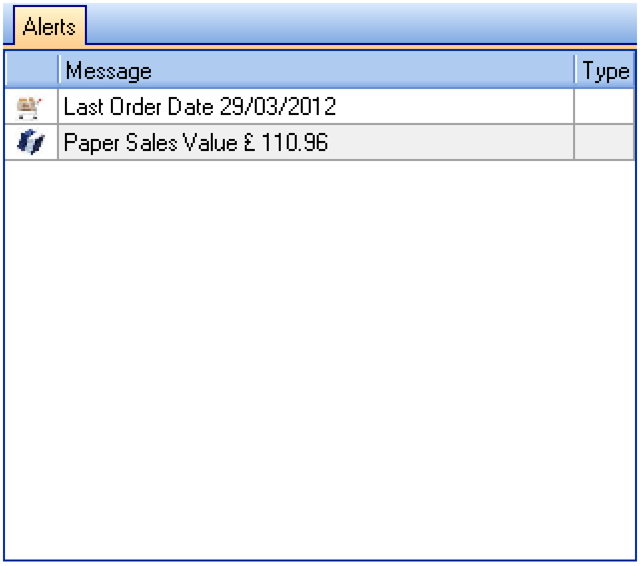
*Note: If you select / unselect any groups against a contact always select **Set Groups** to confirm the changes.*



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



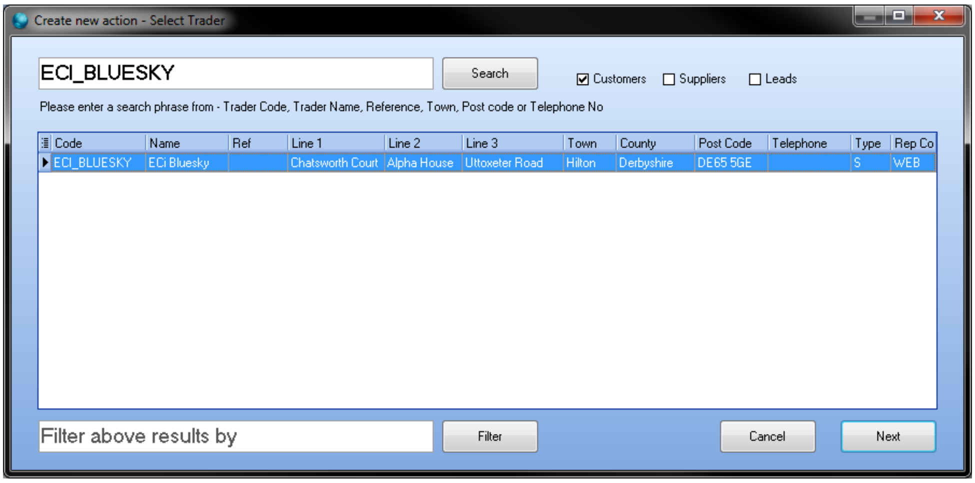
The Alerts section shows all alerts that are available for the login to view.

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:



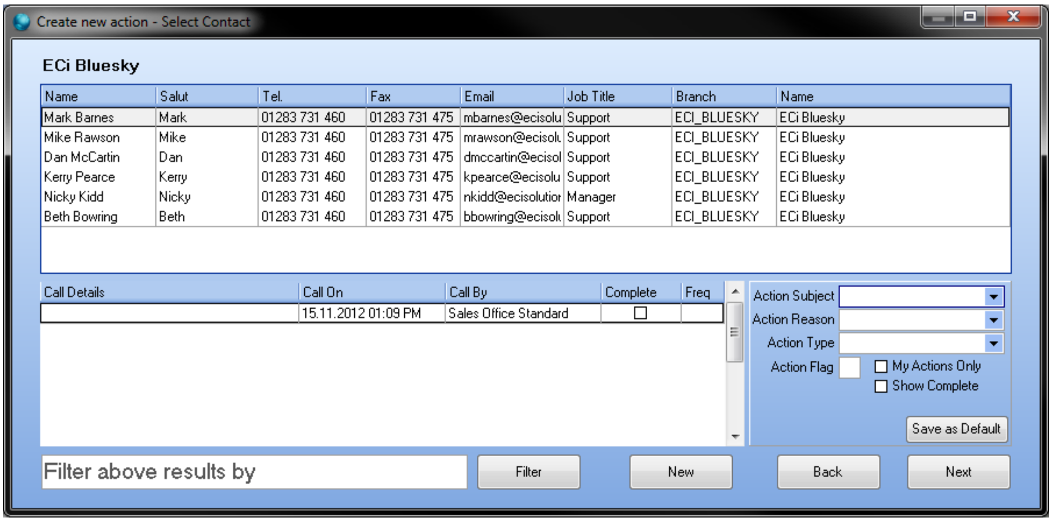
2. Search for the trader you wish to create the Action for.

   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:



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:

*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.

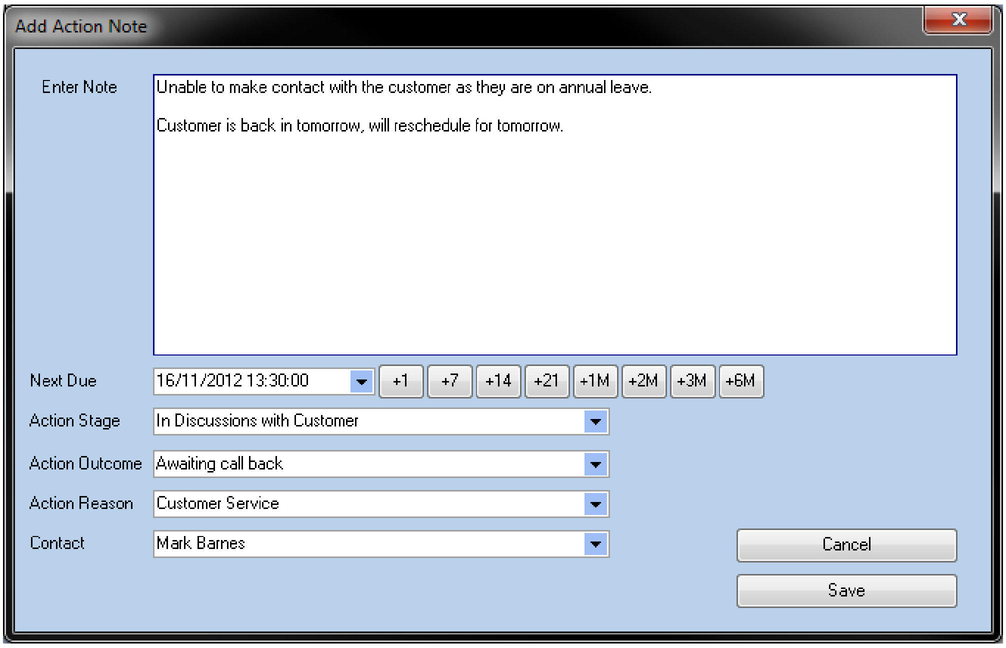
7. Select **Finish**.

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.



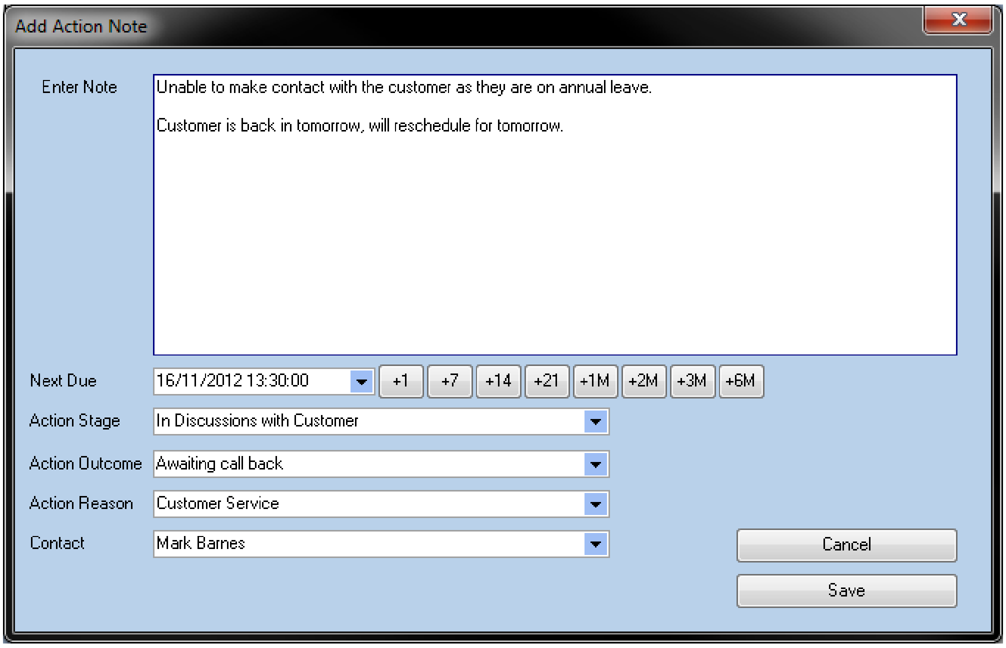
2. Enter a Note
3. Select the Next Due Date
4. Select a Action Stage
5. Select a Action Outcome
6. Select a Action Reason
7. Select the Customers Contact you spoke to
8. Select **Save** to confirm
9. To then close the Action screen press **Save and Exit**.

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.



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.

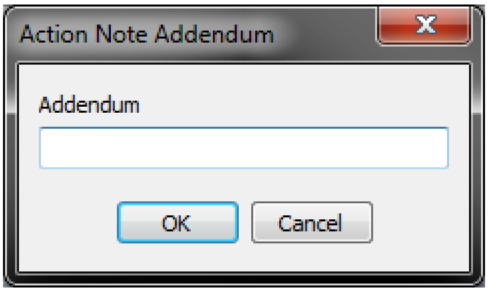
4.6 Append an Existing Action Note

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**.

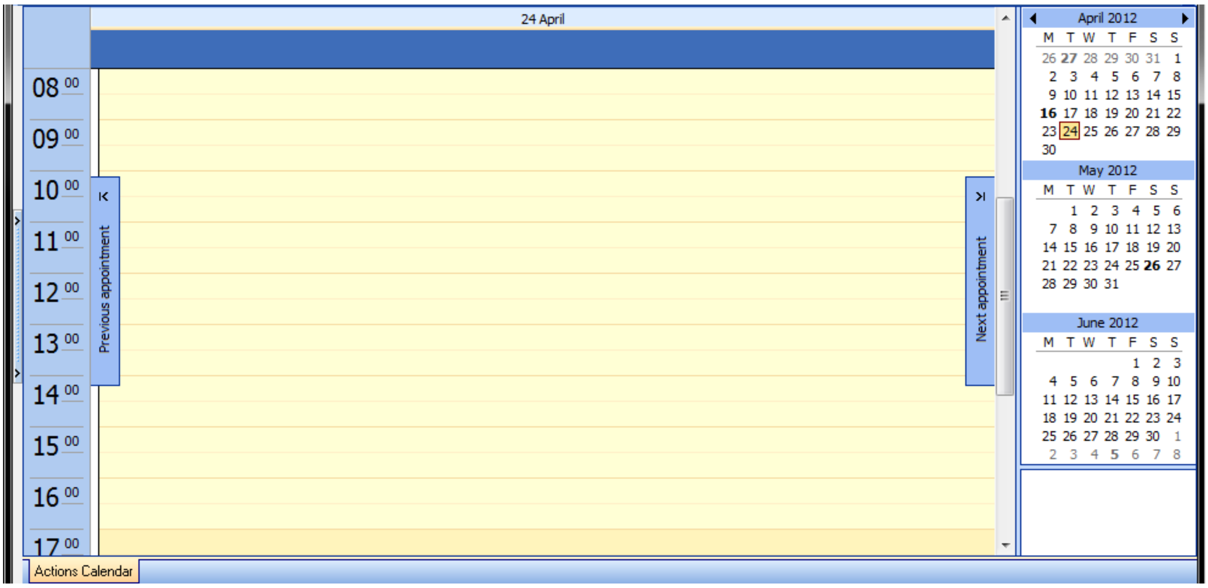
5. Actions Calendar

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

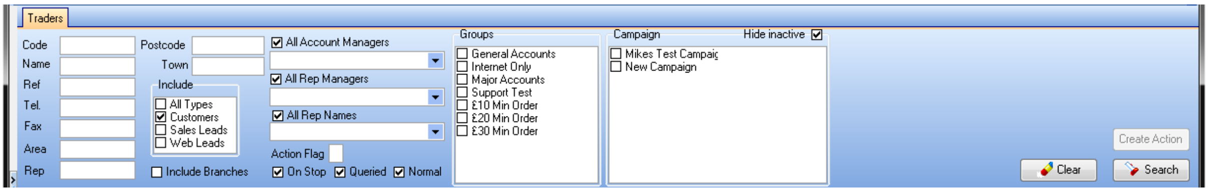
You are able to select a day from the calendar to view actions that are on Horizon for that day.

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.



You are able to base your search criteria on:

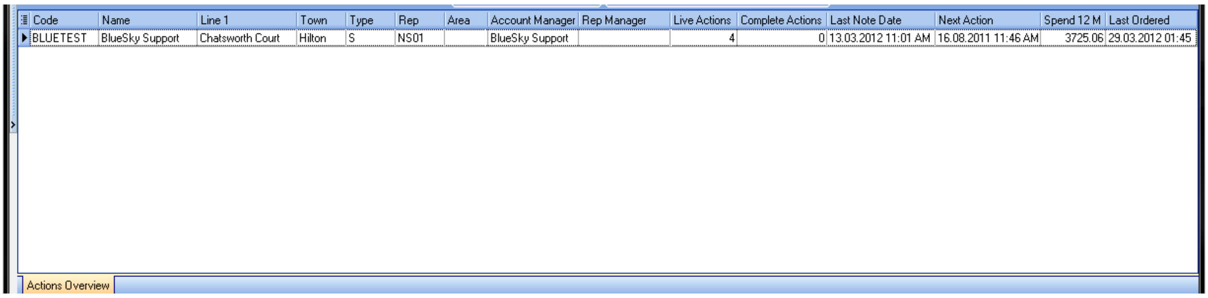
- Code
- Name
- Reference
- Telephone
- Fax
- Area
- Rep Code
- Post Code
- Town
- Trader Type (All Types, Customers, Sales Leads, Web Leads)
- Account Manager
- Rep Manager
- Rep Name
- Trader Group
- Campaign

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,



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

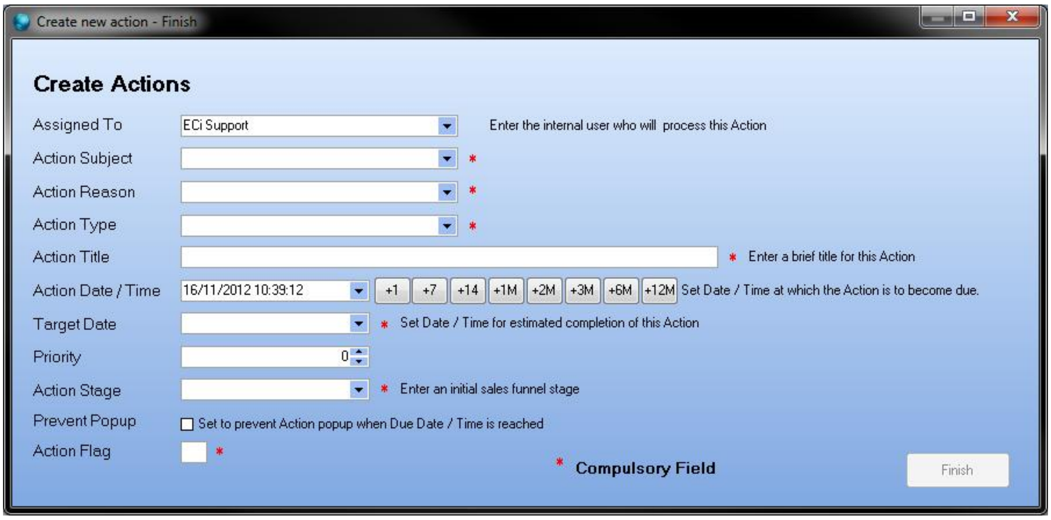
6.2 Creating Actions from the Overview section

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**.