

SouthWare CRM Portal

The SouthWare CRM Portal provides customer relationship management functions for your business. It provides simple, intuitive web pages for your salespeople and customer service staff so they can easily access the data and functions they need to do their work well.

For a salesperson this includes:	For customer service or help desk staff this includes:
<ul style="list-style-type: none"> • Accounts • Contacts • Sales opportunities • Orders and Quotes • Prospects and Leads • Product Info • Tasks • Open Customer Requests • Knowledge base • Sales and Forecast Graphs • Commission Sales • Marketing Projects 	<ul style="list-style-type: none"> • Open Cases/Requests • Past Cases/Requests • Customer Info • Contacts • Product Info • Knowledge base

The portal is designed as a fully-functioning starting point for your CRM experience. Since it uses NetLink templates you may easily customize this to change the style/look or features. And you may easily integrate web pages from other services (such as automated e-mail campaigns, industry benchmarks, document management, etc.).

Access to Portal

To access this portal you must call the request WICRMMAIN along with valid internal login information (reqr_type=l, reqr_id=name, auth_id=password).

CRM Mode

In the upper right of the screen is the CRM mode selector. This lets you change between different sets of tabs that correspond to roles. The modes available with this initial release are "Sales" and "Help Desk". Select a mode to automatically switch to that set of tabs.

By default the mode will be "Sales". If you pass a value for the variable "startmode" you can specify the mode (available modes for standard pages are "sales" and "helpdesk").

Standard Tabs

Here are the standard tabs available:

Tab	Sales Mode	Help Desk Mode
Home	Yes	No
Accounts	Yes	Yes
Contacts	Yes	Yes
Opportunities	Yes	No
Reports	Yes	No
Dashboards	Yes	No

Projects	Yes	No
Cases	Yes	Yes
Solutions	Yes	Yes

Tab Descriptions

Here are the key components of each tab:

Home Tab

The Home tab (request ID of WICRMHOME) provides an efficient workspace for most common salesperson functions. With the QuickLinks menu options on the left you can create additional temporary tabs (that you can close as desired). This means that you can be working with multiple pages at the same time within the Home workspace.

Standard options include:

- **Find** - You may enter a value in the Find field and click on the appropriate button to create a new tab to search for:
 - **Acct#** - Display a customer number
 - **Name** - Find Relationships (all types) by name
 - **Contact** - Find Contacts by name
 - **Order** - Display an order number
 - **Invoice** - Display an invoice
 - **Product** - Find a product by key word search
 - **Phone** - Find a Relationship by phone number
 - **State** - Find a Relationship by State
 - **SlsOpp** - Find a Sales Opportunity by task Reference
- **Home** (request ID of WICRMHOMEAREA) - this provides a dashboard with a snapshot of quotes, orders, pipeline, accounts, tasks, and other info.
- **Order/Quote** - Access the Order Entry web portal
- **New Task** - Create a new task
- **New Prospect** - Create a new prospect/lead (with contact and opportunity info)
- **New Opportunity** - Create a new Sales Opportunity task
- **Task List** - Display a full task listing
- **Open Quotes List** - List all open quotes for the salesperson
- **Open Orders List** - List all open orders for the salesperson
- **Prospects** - Lists all prospects for the salesperson
- **Customers** - Lists all customers assigned to the salesperson
- **Commission Sales** - Gives a commissionable sales report and totals for the salesperson

Accounts Tab

The Accounts Tab (request ID of WICRMACCOUNTS) gives you access to all your relationship records. The following sub-tabs are available (shown at the bottom of the screen):

- **Recent** - This shows a list of relationships for recent tasks. If you are looking for a relationship that you have been working with lately it should be on this list. You can zoom to the view for any relationship listed here. Additional options in this tab include:
 - **Find** function (see above)
 - **Customer Aging** - Lists all customers assigned to the salesperson and allows zoom into customer details
 - **Collections** - Accesses the customer collections portal which allows review and editing of all customer payment collection data
 - **Order/Quote** - Access the Order Entry web portal
 - **New Prospect** - Create a new prospect/lead (with contact and opportunity info)
- **Customers** - This portal provides a set of customer-oriented search functions and reports
- **Prospects** - This portal provides a set of prospect-oriented search functions and reports
- **Vendors** - This portal provides a set of vendor-oriented search functions and reports
- **All Relationships** - This portal provides combined search functions for all relationship types

Contacts Tab

The Contacts Tab (request ID of WICRMCONTACTS) gives you access to all your contact records. With the QuickLinks menu on the left you can create additional temporary tabs (that you can close as desired). Standard options include:

- **Recent Contacts** - This shows a list of contacts for recent tasks. Click on a contact to zoom to the contact view portal.
- **Find** - You may enter a value in the Find field and click on the appropriate button to search for:
 - **Name** - Find Contacts by Name
 - **Phone** - Find Contacts by Phone
 - **State** - Find Contacts by State
- **All Contacts** - This lists all contact records. You can use the filters at the top of each column to filter the list.
- **New Prospect** - Create a new prospect/lead (with optional contact and opportunity info)

Opportunities Tab

The Opportunities Tab (request ID of WICRMOPPS) gives you access to info related to your sales opportunity tasks. With the QuickLinks menu on the left you can create additional temporary tabs (that you can close as desired). Standard options include:

- **Open Opportunities** - This shows a list of your open opportunity tasks. The report initially shows Recent Opportunities, but you can click on links at the top to view other versions of the list. Click on an opportunity to zoom to the opportunity view (see "Opportunity View" below).
- **Find** - You may enter a value in the Find field and click on the appropriate button to search for:
 - **Name** - Find Opportunities by Relationship Name
 - **Reference** - Find Opportunities by Reference on the task
- **New Opportunity** - Create a new opportunity task
- **New Prospect** - Create a new prospect/lead (with optional contact and opportunity info)

- opportunity info)
- **Forecast** - Accesses the Dashboard tab to show estimated closings for opportunities
- **Weighted Amounts** - Shows opportunity totals and graphs based on estimated amount multiplied by probability percent
- **Estimated Amounts** - Shows opportunity totals and graphs based on estimated sales amounts
- **Opportunity History** - This shows a list of closed opportunity tasks. You have the option to list Made Sales, Lost Sales, and All Closed Sales. From the list you may zoom into the Opportunity View.
- **Competitors** - This accesses a portal of competitor info. The portal shows a list of all competitors and a list of all competitor products. You may zoom on a competitor or product to list all related opportunities. You may also add a new competitor or new product via this portal.

Opportunity View

The display of an opportunity lets you review and edit opportunity information. You may:

- Edit selected fields
- Add competitors/products
- Add new tasks
- Create related quotes
- Close an opportunity as a Made Sale or Lost Sale (which launches related functions such as turning a prospect into a customer and turning a quote into an order)

Reports Tab

The Reports Tab (request ID of WICRMREPORTS) gives you access to several analysis reports on sales, customers, products, and other related info. You may also want to link from this tab to other custom reports you have created. With the QuickLinks menu on the left you will create additional temporary tabs (that you can close as desired) for each report you access.

Dashboards Tab

The Dashboards Tab (request ID of WICRMDASHBOARD) gives you access to several analysis graphs. There are two standard subtabs for Dashboards:

- **Opportunity Pipeline** - This dashboard shows an extended graph of estimated sales based on opportunities. It also shows graphs of the pipeline stages for your current open opportunities.
- **Sales** - This dashboard shows several order and invoice analysis graphs.

Projects Tab

The Projects Tab (request ID of WICRMPROJMAIN) gives you access to info on any sales/marketing projects. With the QuickLinks menu on the left you can create additional temporary tabs (that you can close as desired). Standard options include:

- **Open Projects** - This shows a list of your open projects that have a category of "Sales/Marketing". Click on a project to zoom to the project view.
- **Find** - You may enter a value in the Find field and click on the appropriate button to search for:
 - **Name** - Find projects by project name
 - **Text** - Find projects by searching the text on the project
- **Late Projects** - This shows a list of Sales/Marketing projects that are open but were scheduled to already be completed.

- **Completed Projects** - This shows a list of completed Sales/Marketing projects.

Cases Tab

A case is a customer-initiated task that requires action to resolve. The Cases Tab (request ID of WICRMCASEMAIN) gives you access to tasks with a Reason Code of "Customer Request". Standard options include:

- **Open Cases** - This shows a list of your open cases (tasks) that have a Reason Code of "Customer Request". Click on a case to view and update the task.
- **Find** - You may enter a value in the Find field and click on the appropriate button to search for:
 - **Text** - Find cases by searching the text and reference of the task.
- **Add New Task** - This displays the task entry portal to create a new task.
- **(operator) Only** - This limits the list to the current operator.
- **Include Groups** - This expands the list to include all cases assigned to the operator and cases assigned to groups the operator can access.

Solutions Tab

The Solutions tab (request ID of WICRMSOLUTIONS) gives you access to information from past Cases and to the information available in TaskWise AnswerReady. Options include:

- **Find** - You may enter a word or words in the Find field and click on the appropriate button to search for:
 - **Cases** - Find past closed cases based on the text in the Reference field and Text field.
 - **Answers** - Find AnswerReady topics based on the text in the topic.
- **Show All Answers** - This displays a list of all AnswerReady topics
- **Add New Answer** - This option displays a page you can use to add a new topic to the AnswerReady database.

Set Up Notes

After you install this portal here are some set up issues to consider:

- Available tabs - if you want to change the tabs available you can edit the wicrmmain.htm template.
- Cases - use the Reason code of "Customer Request" on any tasks that should be shown in the Cases tab.
- Projects - use the category of "Sales/Marketing" for any projects to be shown in the Projects tab.