CRM for PTS
Quick Start Guide
(Beta v.1)

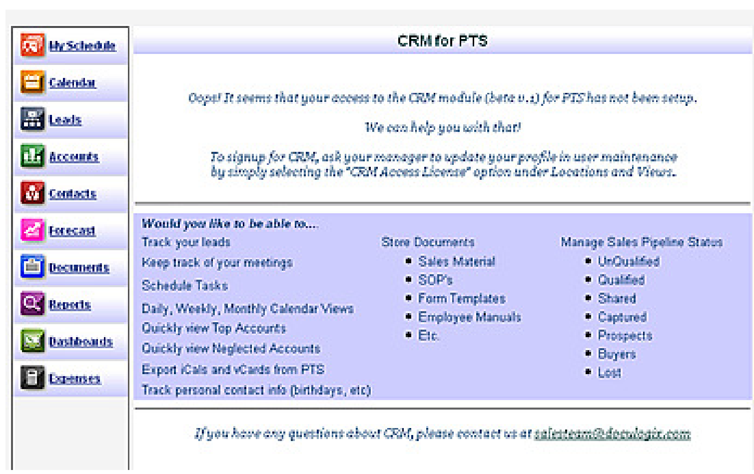
Overview
Doculogix is happy to introduce into beta the Customer Relationship Management (CRM) module for PTS. This document is meant to give you an overview of setting up and navigating PTS CRM. The version described herein is beta version 1 of CRM. In the coming days and weeks we will continue to add functionality to the module as we near full release (more on this at the end of this document). We appreciate your taking the time to evaluate the CRM module and look forward to your feedback.

Managing Licenses and Users
The CRM module requires a single license per user, and those licenses are managed in the same manner that existing monthly user licenses are managed. These licenses are in addition to the existing monthly subscription licenses. Therefore, we have added two additional columns to the license management section on the user list screen (see below).

Location	Active Users	User Licenses	Remaining User Licenses	CRM Licenses	Remaining CRM Licenses
Dallas	58	65	7 : Reduce	10	6 : Reduce
Fort Worth	1	3	2 : Reduce	1	0 : Upgrade
Rowan One	1	5	4 : Reduce	0	0 : Upgrade

Before you begin using CRM, you must specify how many licenses you need. During beta the licenses will be provided at no cost.

Some Assembly Required – CRM Setup
Users
When the CRM tab is clicked for the first time, the user may be presented with a screen similar to the image to the right. The reason a user sees this screen is because they have not been granted access to the CRM module yet.



To provide a user access to CRM, pull up the Locations & Views section of User Maintenance. At the bottom you'll find a new checkbox labeled "CRM Access License". After clicking the checkbox, two menu selection fields will appear.

The first menu identifies the user's security level within CRM. The CRM User level is the equivalent of a sales rep. One who is setup as CRM Users will only be able to view his or her accounts and contacts, just as is the case when the limit location view is selected in other sections of PTS. CRM Users are also required to have a CRM Approver selected. This is needed for Lead Approvals, which will be discussed later.

The second option is a CRM Administrator. Sales Managers, for example, should be assigned this value as they will be the CRM Approver, assign leads to reps, have access to CRM Administration, and be able to view CRM Analysis metrics that will be added in the coming weeks.

Activity Types

Now that your users have been granted access to CRM, it's time to determine your activity types. Activities should be items such as "Meeting", "Follow-up Meeting", "Office Tour", etc. These are the items that sales reps are going to schedule with their accounts in an effort to gain work. Activity Types are managed by clicking the CRM Admin button in the CRM navigation pane.

Task Types

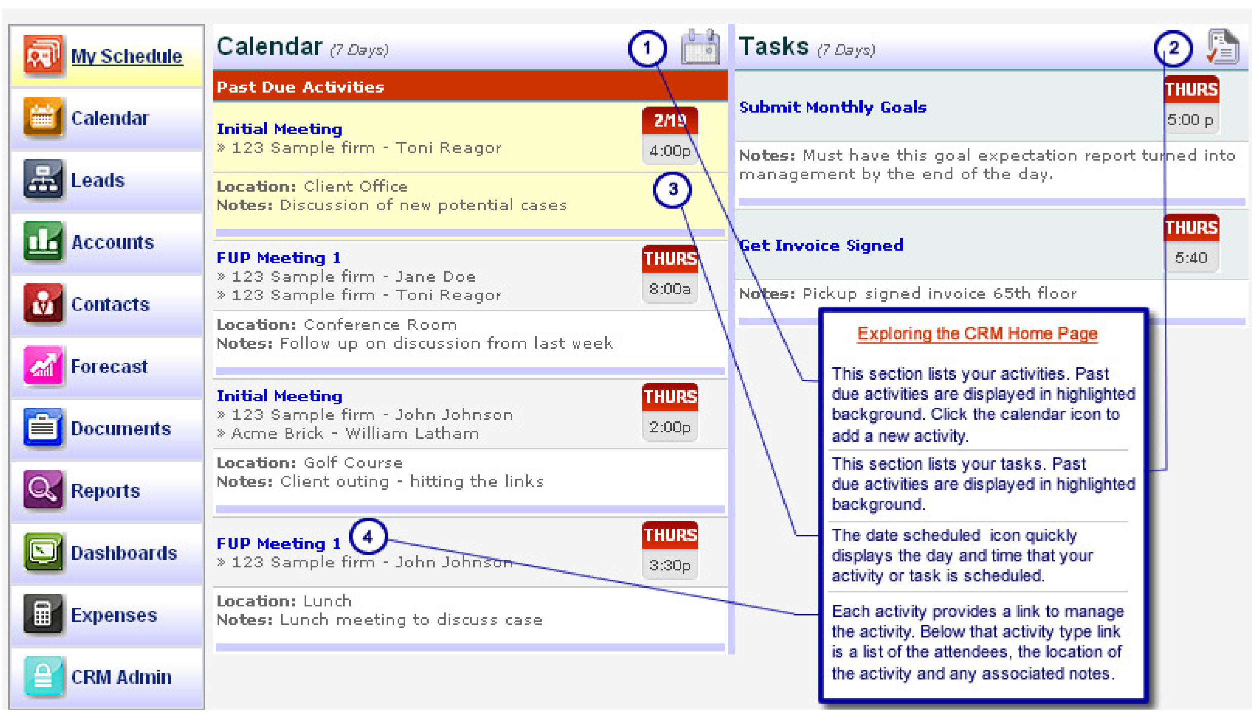
Task types should also be established using the CRM Admin section. Tasks may be items such as "Send Email", "Phone Call", "Interoffice Tasks", etc. Tasks are not meant to be appointments and are not tracked as such. Rather, they are reminders to the user to complete a required duty.

Account Rating Potential

One of the ways PTS CRM allows you to group Leads and Accounts is via a rating potential. The rating ranges from one dollar sign ($) to five dollar signs ($$$$$). Each of these rating values should be represented by a beginning and ending dollar value. It is up to you to determine these values, but one use may be an expected monthly revenue amount. Then each account can be "rated" based on your revenue expectation.

The CRM Home Page

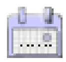
The landing page for your CRM experience is designed to provide the user with a daily overview of scheduled activities and tasks. See the image below for a description of the CRM Home Page.



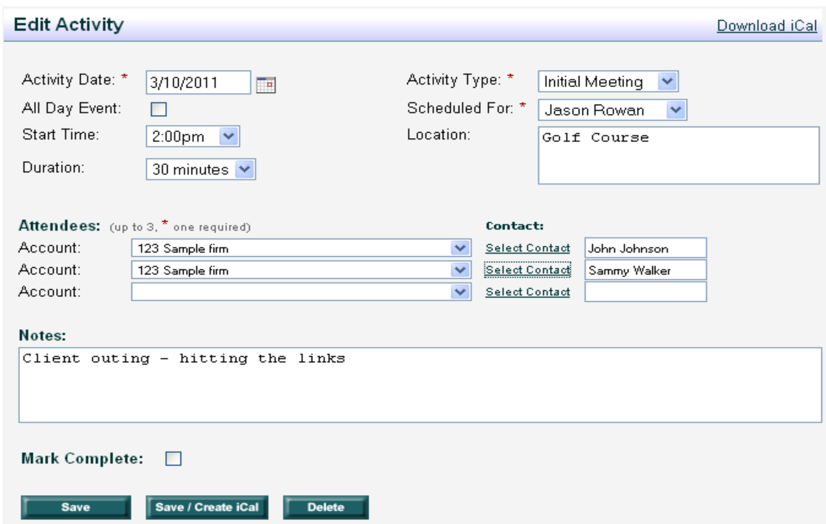
On the left side of all pages within the CRM module you will find a navigation pane. The "My Schedule" link will always bring you back to this home screen. In the body of the page you'll find two sections; the Calendar section, which lists all incomplete activities, as well as a tasks section.

Clicking on the activity type link (blue highlighted text) will take you to the activity edit screen. This page will allow the user to input notes, change dates and times, add and/or edit attendees, and complete the activity by entering a date completed value and an outcome.

Scheduling an Activity



Anytime this icon is displayed in the CRM section, the user is only a click away from scheduling an activity. You'll find this icon on the home screen, on the various calendar views, and within the accounts section. Scheduling an activity is quick and easy, as seen in the following graphic.



1. Enter an activity date
2. Select activity type
3. Select who the activity is scheduled for
4. Set the time/duration
5. Select attendee(s)

The location and notes fields are both optional; however they can provide valuable information on the CRM Home Page when you are quickly skimming thru your list of scheduled activities.

Once the form has been completed, there are two save options. To simply save the activity, click the "Save" button. If you would also like to have an iCal created for import into Outlook, click the "Save/Create iCal" button. If you fail to create an iCal while creating the activity, no need to worry. You can download an iCal at anytime by opening the activity and clicking the "Download Activity" link at the top right of the edit activity screen (see image above).

When it is time to complete the activity, click the "Mark Complete" checkbox at the bottom of the edit activity screen. The form will display two additional fields; Date Completed and Outcome. Finally click the Save button to close the activity.

Scheduling a Task

Creating a task, as well as completing a task, is done using the same methods as described above in the Scheduling an Activity section. Simply look for this icon instead.

Calendar Views

Calendars in PTS CRM provide another quick way to view your upcoming scheduled activities. At the top of each calendar is a set of navigation icons. Three links provide navigation between the different calendar views. You will also find the two icons described above for adding an activity or task. Finally there are left and right arrow icons to move from day to day, week to week or month to month.

When a user initially clicks on the "Calendar" tab in the CRM navigation pane, the first calendar that appears is the Day View calendar. This form will provide the user with a list of all activities scheduled on any given day. Clicking the left and right arrows will move the calendar to the previous or next day.

The second calendar view is a weekly calendar view. Starting on Sunday and ending on Sunday, this form provides the user with a list of all activities scheduled during any given week. Clicking the left and right arrows will move the calendar to the previous or next week.

The last calendar view is the monthly calendar (as seen in the image to the right). As with the other calendar views, you will find the add activity and add task icons, as well as the month to month navigation arrows.

One important note is that calendar views display only activities. Tasks are not displayed in the calendar, but rather they have their own list view by clicking the "Tasks" link on the CRM Home Page..

Within the calendars, links are provided on each activity, allowing single click access to manage the activity, whether that might be editing a scheduled time, adding or editing attendees, or completing the activity.

Leads

Leads are defined as accounts that have not been assigned to any sales rep. Leads will also have a status of "Unqualified".

When the Leads link is clicked in the CRM navigation bar, a list of all leads in the PTS for your location will be displayed. Regardless of security level, all leads are displayed to the user and are not filtered based on any set of criteria. By design, this allows users with a "CRM User" security level to request leads, and users with the "CRM Admin" security level to assign leads to reps.

The graphic to the left displays the difference in views between a CRM User and a CRM Administrator. Notice that the CRM Admin has a drop down menu of available sales reps from which the admin can assign a lead. The CRM user, in contrast, simply has a link to request the lead. When a lead is requested, an email will be delivered to that user's CRM Approver (setup in user maintenance, only required for CRM Users).

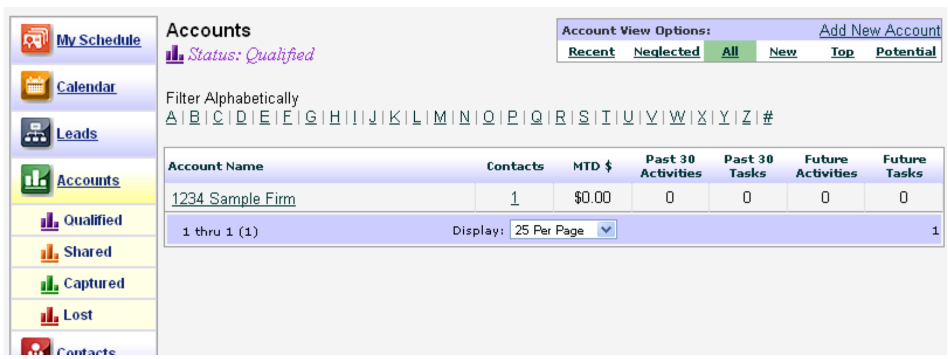
When a lead is assigned to a given sales rep, the lead automatically changes into an Account with a status = “Qualified”.

Accounts

Accounts are defined as records that have been assigned to a sales rep and may be grouped into one of four status levels. General definitions of each status are provided below; however each location may interpret these status levels differently.

- Qualified - Accounts that have been assigned to a sales rep but have yet to give you any work
- Shared - Accounts that are sending you work regularly, but who also send work to other companies.
- Captured - Accounts that primarily use your company as their vendor of choice.
- Lost - Accounts that no longer send work your way.

As we move thru this beta testing period and add to the CRM software, we anticipate that changes in status level will be automated by PTS. As of this version release, all changes in Account status require manual intervention.



As you can see in this graphic, each status is represented by a link in the CRM navigation bar. Click on these links to quickly group your accounts by status. If you would like to view all Accounts, regardless of status, simply click the “Accounts” link again in the navigation bar. Further filtering may be applied using the “Account View Options” in the body of the page. The default view is “All” and will show all Accounts. Below is a breakdown of the view settings and how they filter the data.

- Recent – Filters for accounts that have had an activity scheduled in the last “x” number of days. A menu will appear when this link is clicked allowing you to customize the filter.
- Neglected – Filters for accounts that have NOT had an activity scheduled in the last “x” number of days. A menu will appear when this link is clicked allowing you to customize the filter.
- New – Filters for accounts that were created in the previous “x” number of days. A menu will appear when this link is clicked allowing you to customize the filter.
- Top – Filters for accounts with month-to-date revenue (based on date a job was created) exceeding a certain dollar value. A text box will appear when this link is clicked allowing you to customize the filter.
- Potential – Filters accounts based on the account rating potential that has been assigned. Recall that rating potential is defined and can be found by clicking the CRM Admin navigation link

Finally, at the bottom of the accounts page is a set of record display options. Along with the total number of records in any given result set, you may choose the number of records to display per page and use the navigation links to move between pages of accounts.

Contacts

Contacts are the actual people that make up an account. Contacts are the equivalent of client users inside PTS. Contacts are also represented by a set of status levels, as defined below.

- Unqualified -Contacts with whom you've had no business
- Qualified - Contacts that have been identified as someone from whom you'd like to receive business.
- Prospect - Contacts that you are actively working in an effort to receive business.
- Buyer – Contacts that are sending work to your company.
- Lost Buyer – Contacts that no longer send work your way

As with the Accounts section, the Contacts section allows you to filter contacts based on status using the CRM navigation bar. You may also filter the contacts using the Contact View Options located in the body of the page.

After you filter for your list of contacts, you'll notice that each record has an accompanying icon next to the contact name. This is a vCard link that will allow for quick download of contact information into Outlook.

Documents

The documents section is designed to be a one-stop place for your employees to find useful materials that are commonly requested, such as sales material, employee manuals, expense form templates, etc. Each document you upload should be assigned a document type (which is defined inside CRM Admin) so that easy filtering can be performed on the document list page.

So What's Next???

As you dig into the CRM you'll notice that a few tabs are still under development. Rather than wait until the palace is complete, we decided to give you the framing to work with in the meantime (bad analogy, but you get the idea). So what are we still working on?

We are in the process of building the first round of reports and will be releasing those soon. You can expect to see reports such Account scheduling activity, Contact scheduling activity, Accounts that have not had activities scheduled in the past "x" days, Sales Rep activity, etc.

We are also going to integrate an expense tracking section that will allow sales reps to input their expense receipts. This will offer a two-fold benefit. Expense reporting can be performed directly in PTS, removing the need to have another process to handle expenses. Second, and most importantly, you'll be able to compare expenses on accounts and contacts to the actual amount of work you're getting out of them.

An Admin Analytics section will be the favorite place for sales managers. It will allow for detailed analysis of your accounts and reps. It will also have enhanced management features for moving leads, accounts and contacts, as well as enabling you to define custom metrics that trigger automated status changes within PTS CRM.

Additionally, we look forward to your feedback. As is the case with PTS, your feedback is what makes our product the best on the market. We welcome suggestions on your experience. Is there a navigation change that would make the experience better? Is there an enhancement that would make your job easier? Don't hesitate to reach out to us should you have a suggestion or run into an issue.