

**The integrated total solution for service providers: projects, processes, knowledge.**

## **Help, Part 2: Contact Management, CRM**

### **Table of Contents**

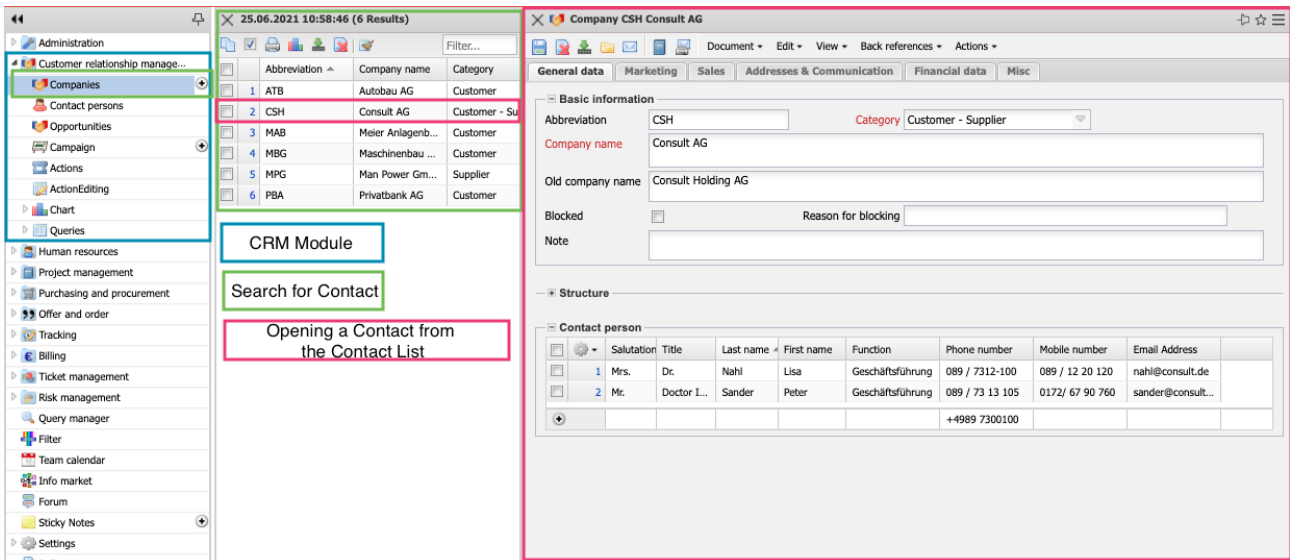
|                                      |    |
|--------------------------------------|----|
| 2.1 Contact Management, CRM.....     | 2  |
| 2.2 Contacts.....                    | 3  |
| 2.3 Divide Contacts.....             | 6  |
| 2.4 Create Contact Person.....       | 7  |
| 2.5 Create Actions.....              | 8  |
| 2.6 Manage Sales Funnels.....        | 9  |
| 2.7 Further CRM Functionalities..... | 12 |

## 2.1 Contact Management, CRM



Customer Relationship Management (CRM), or customer relationship management, describes the orientation of a company towards its customers and the systematic design of customer relationship processes. The associated documentation and management of customer relationships is an important part of this. The CRM module in Projectile consists of the masks "Contact", "Address", "Contact Person", "Action" and "Sales Funnel".

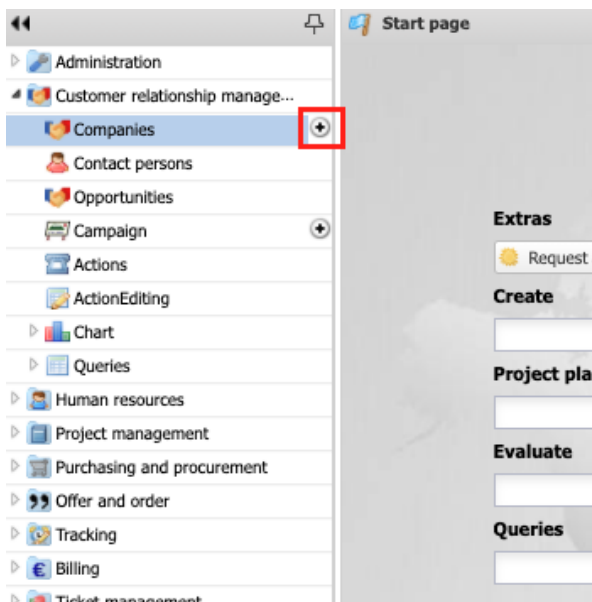
In the main menu "CRM" you will find, among others, the entries for "Contacts" "Contact person", "Sales funnel" and "Promotions". Here the user can (depending on the authorization) search in the existing contact data and view, change and also delete data.



More information about the "User Interface" and "Search and Find" can be found in part 1 of the help.

## 2.2 Contacts

The "Contact" mask manages all contacts with their contact persons. Contacts can be customers, interested parties and suppliers, among others. Each contact can be subdivided as desired and can have any number of contact persons. In the following example a new contact is created with the help of the "+" button in the main menu:



First a new record of the type "Contact" opens with some default settings:

Company 11

Document Edit

General data Marketing Sales Addresses & Communication Financial data Misc

Basic information

Abbreviation  Category

Company name

Old company name

Blocked  Reason for blocking

Note

Structure

Contact person

| Salutation | Title | Last name | First name | Function | Phone number | Mobile number | Email Address |
|------------|-------|-----------|------------|----------|--------------|---------------|---------------|
|            |       |           |            |          |              |               |               |

Then the relevant fields of the first tab "General Data" are filled in, such as company name and category. The category is not only an information field, but also has a functional character. If "Customer" is selected as the category, this contact is available as the principal for the projects or invoice recipient for the contracts. If "Supplier" is selected as the category, this contact is available as a supplier for external services and external invoices. After defining the fields of the "General Data" tab, the document is saved ...

Company 11

Document Edit

General data Marketing Sales Addresses & Communication Financial data Misc

Basic information

Abbreviation  Category

Company name

Old company name

Blocked  Reason for blocking

Note

Structure

Contact person

| Salutation | Title | Last name | First name | Function | Phone number | Mobile number | Email Address |
|------------|-------|-----------|------------|----------|--------------|---------------|---------------|
|            |       |           |            |          |              |               |               |

... and switched to the "Marketing" tab. Here, various classifications for the contact can be stored. In addition to the industry sector, foundation, number of employees, turnover and further information, the category of the first contact, partner and processor (key account manager and representative) can also be entered here.

Company MPE Maier Plant Engineering GmbH

Document - Edit - View - Back references - Actions -

General data **Marketing** Sales Addresses & Communication Financial data Misc

SelectionCriteria

Type Company Industry Other

First contact Network partner Partner MBG Maschinenbau GmbH

Sales category Foundation Number of employees

KAM Jahnke Kevin Representative

Related companies

| Company name | Street | Postal code | City | Customer number | Vendor number | Phone number | Web address |
|--------------|--------|-------------|------|-----------------|---------------|--------------|-------------|
|              |        |             |      |                 |               |              |             |

Campaigns

| Number | Description | Campaign status | Campaign category | Campaign start | Campaign end |
|--------|-------------|-----------------|-------------------|----------------|--------------|
|        |             |                 |                   |                |              |

The "Sales" tab will be described separately later (see also "Sales funnel").

Afterwards, the tab "Address & Communication" will be changed. Here, the company address and communication data of the contact is first entered. After saving, the mail address and the web address) are converted by the system. The link to the e-mail address opens the user's standard e-mail client and the link to the Web field opens the contact's website in the user's standard browser.

If different addresses are required (for example, for different billing or delivery addresses) ...

Company MPE Maier Plant Engineering GmbH

Document - Edit - View - Back references - Actions -

General data Marketing Sales **Addresses & Communication** Financial data Misc

Address

Street

Postal code City

Country Germany Language German

Communication

Phone number

Fax number

Email Address

Web address

Additional addresses

| Address type      | Street      | Postal code | City   |
|-------------------|-------------|-------------|--------|
| 1 Billing address | Sonnenweg 2 | 10210       | Berlin |
|                   |             |             |        |

... these can be entered in the lower section of the tab:

The screenshot shows the 'Addresses & Communication' tab. The 'Additional addresses' section contains a table with the following data:

| Address type      | Street      | Postal code | City   |
|-------------------|-------------|-------------|--------|
| 1 Billing address | Sonnenweg 2 | 10210       | Berlin |

In the "Finances" tab, the default settings for the "Billing module" can be stored for the contact. These include, among other things, the sales tax, the payment conditions or the own supplier number for the outgoing invoices.

The screenshot shows the 'Financial data' tab. The 'Invoice data' section contains the following information:

- Value added tax: MwSt-D-19%
- Terms of payment: [empty]
- Cash discount: [empty] %
- Tax number: [empty]
- Currency: EURO
- ExternalPriceForTickets: EUR
- VAT ID: [empty]
- Payment target: 30
- Discount: [empty] %
- Own supplier number: 4356668
- External hourly rate: EUR

## 2.3 Divide Contacts

Contacts can also be further subdivided. In the following example, the company consists of two subsidiaries. Using the "New" function in the "Subordinate Contact" field or (as in the following example) in the editable list view ...

Company MPE Maier Plant Engineering GmbH

Document Edit View Back references Actions

General data Marketing Sales Addresses & Communication Financial data Misc

Basic information

Abbreviation MPE Category Customer

Company name Maier Plant Engineering GmbH

Old company name

Blocked Reason for blocking

Note

Structure

Parent company

Subordinate company

|  | Company name | Category | Street | Postal code | City | Customer number | Vendor number | Phone number | Web address |
|--|--------------|----------|--------|-------------|------|-----------------|---------------|--------------|-------------|
|  |              |          |        |             |      |                 |               |              |             |

Contact person

|  | Salutation | Title | Last name | First name | Function | Phone number | Mobile number | Email Address |
|--|------------|-------|-----------|------------|----------|--------------|---------------|---------------|
|  |            |       |           |            |          |              |               |               |

... subsidiaries or branches are created.

Company MPE Maier Plant Engineering GmbH

Document Edit View Back references Actions

General data Marketing Sales Addresses & Communication Financial data Misc

Basic information

Abbreviation MPE Category Customer

Company name Maier Plant Engineering GmbH

Old company name

Blocked Reason for blocking

Note

Structure

Parent company

Subordinate company

|   | Company name              | Category | Street | Postal code | City | Customer number | Vendor number | Phone number | Web address |
|---|---------------------------|----------|--------|-------------|------|-----------------|---------------|--------------|-------------|
| 1 | Maier Measuring Techn...  | Customer |        |             |      |                 |               |              |             |
| 2 | Maier Medical Technolo... | Customer |        |             |      |                 |               |              |             |

Contact person

|  | Salutation | Title | Last name | First name | Function | Phone number | Mobile number | Email Address |
|--|------------|-------|-----------|------------|----------|--------------|---------------|---------------|
|  |            |       |           |            |          |              |               |               |

## 2.4 Create Contact Person

Any number of contact persons can be assigned to each contact (including subordinate contacts) and freely definable actions can be assigned to these contact persons (for example, for project acquisition). In the following example, three contact persons are assigned to the company "Meier Anlagenbau GmbH".

Using the "New" function in the "Contact person" field or (as in the following example) in the editable list view ...

The screenshot shows a software interface for 'Company MPE Maier Plant Engineering GmbH'. The 'Basic Information' section includes fields for Abbreviation (MPE), Company name (Maier Plant Engineering GmbH), and Category (Customer). Below this is the 'Structure' section, which contains a table for 'Contact person'. The table has columns for Salutation, Title, Last name, First name, Function, Phone number, Mobile number, and Email Address. The table is currently empty, with a '+' icon at the bottom left of the table area.

... the contact persons are created.

The screenshot shows the same software interface as above, but now the 'Contact person' table contains two entries. The first entry is 'Mr. Hansen Alfred' with email 'Alfred.Hansen@...'. The second entry is 'Mrs. Dr. Johnson Zoey' with email 'Zoey.Johnsons...'. The number '2' in the second row's first column is highlighted with a red box.

|   | Salutation | Title | Last name | First name | Function | Phone number | Mobile number | Email Address     |
|---|------------|-------|-----------|------------|----------|--------------|---------------|-------------------|
| 1 | Mr.        |       | Hansen    | Alfred     |          |              |               | Alfred.Hansen@... |
| 2 | Mrs.       | Dr.   | Johnson   | Zoey       |          |              |               | Zoey.Johnsons...  |

The data can then be supplemented in the "Contact Person" mask:



Contact person Johnson Zoey

Document Edit View Actions

General data History Details Private Misc

Basic information

Company MPE Maier Plant Engineering GmbH Type

Salutation Mrs. Title Dr.

Last name Johnson First name Zoey

Department Function

Blocked Reason for blocking

Note

Address

Street Sonnenstr. 12 City Berlin

Postal code 10210 Language German

Country Germany Fax number

Phone number

Mobile number

Email Address Zoey.Johnsons@mpe.com

On the "Details" tab, you can enter, among other things, the office, supervisor, assistant, profession and organization. On the "Private Details" tab you can enter your private telephone number, mobile number, fax and e-mail, web and postal address and other private information.

## 2.5 Create Actions

Any number of actions can be defined for each contact person in the "History" tab. Actions can be, for example, inquiries, appointment arrangements, follow-ups or similar. These actions log important events (history) and can also be used for acquisition and customer care. You can use the "New" function in the "Action" field or (as in the following example) in the editable list view ...

Contact person Johnson Zoey

Document Edit View Actions

General data History Details Private Misc

Actions

|  | Date             | Employee     | Type of action | Note | Check                    |
|--|------------------|--------------|----------------|------|--------------------------|
|  | 25.06.2021 00:00 | Schaub Peter |                |      | <input type="checkbox"/> |

Campaigns

|  | Number | Description | Campaign status | Campaign category | Campaign start | Campaign end |
|--|--------|-------------|-----------------|-------------------|----------------|--------------|
|  |        |             |                 |                   |                |              |

Meetings

|  | Title | From             | To               | Topic | Location | Notes |
|--|-------|------------------|------------------|-------|----------|-------|
|  |       | 25.06.2021 11:46 | 25.06.2021 11:46 |       |          |       |

Dates

|  | Name | Category | From | To | Inviter |
|--|------|----------|------|----|---------|
|  |      |          |      |    |         |

... actions are created.

The screenshot shows a CRM interface for a contact named 'Johnson Zoey'. The interface includes a menu bar with 'Document', 'Edit', 'View', and 'Actions'. Below the menu are tabs for 'General data', 'History', 'Details', 'Private', and 'Misc'. The 'History' tab is active, displaying several sections:

- Actions:** A table with columns: Date, Employee, Type of action, Note, and Chec. It contains three entries:

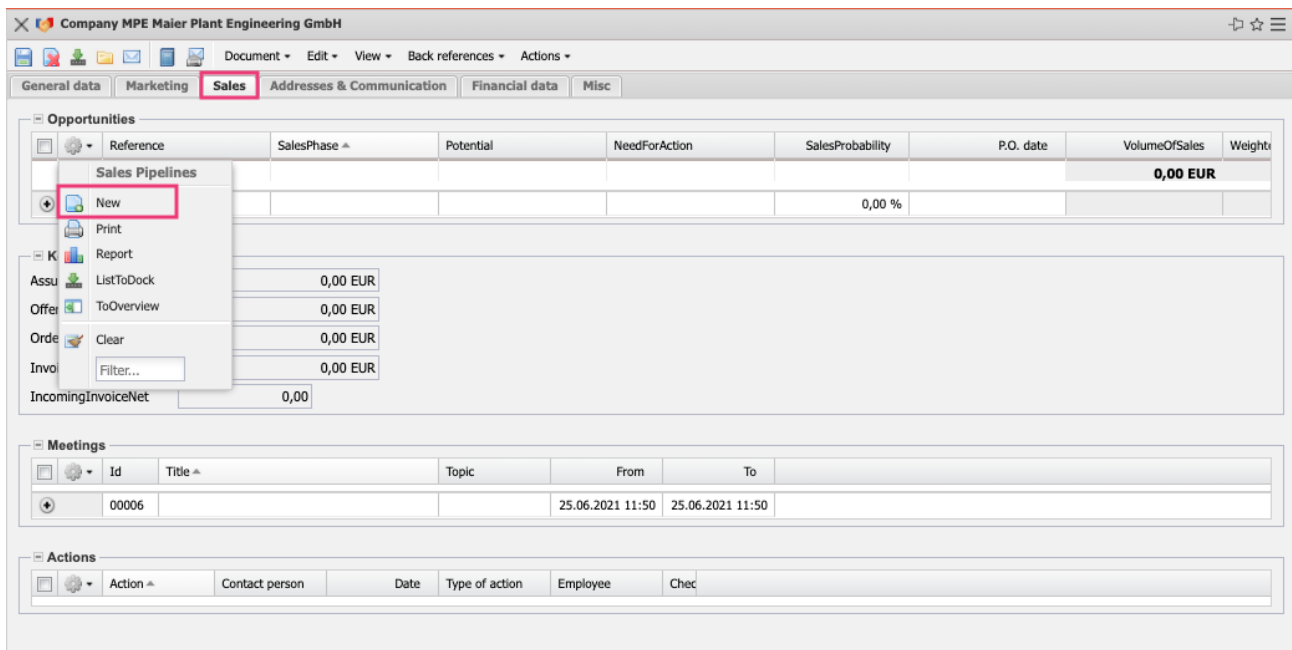
|   | Date             | Employee     | Type of action | Note | Chec                                |
|---|------------------|--------------|----------------|------|-------------------------------------|
| 1 | 22.06.2021 11:48 | Otto Frauke  | Presentation   |      | <input checked="" type="checkbox"/> |
| 2 | 25.06.2021 18:00 | Schaub Peter | General call   |      | <input type="checkbox"/>            |
|   | 25.06.2021 00:00 | Schaub Peter |                |      | <input type="checkbox"/>            |
- Campaigns:** A table with columns: Number, Description, Campaign status, Campaign category, Campaign start, Campaign end.
- Meetings:** A table with columns: Title, From, To, Topic, Location, Notes. It contains one entry:

| Title | From             | To               | Topic | Location | Notes |
|-------|------------------|------------------|-------|----------|-------|
|       | 25.06.2021 11:48 | 25.06.2021 11:48 |       |          |       |
- Dates:** A table with columns: Name, Category, From, To, Inviter.

## 2.6 Manage Sales Funnels

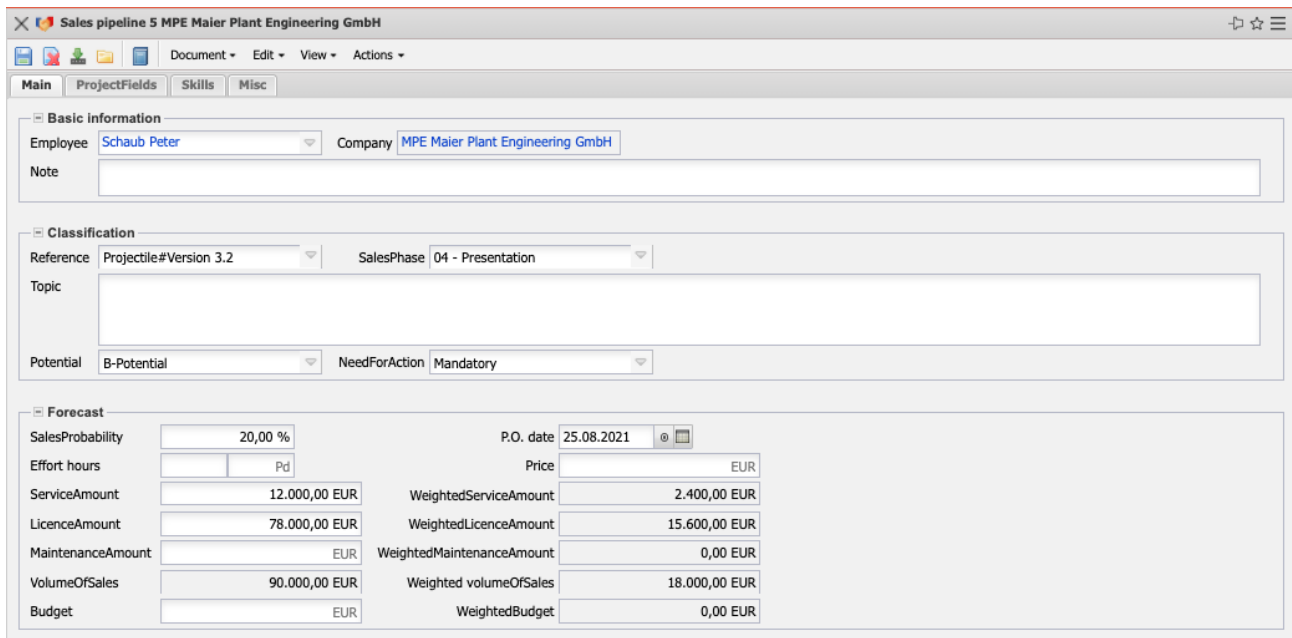
Opportunity Management comprises the generation, recording, mapping, controlling and evaluation of sales opportunities. An opportunity arises from a lead (for example, a contact inquiry via the website or a trade fair contact). If this contact has been checked and qualified and if there are good chances of selling products or services to this interested party, the lead becomes an opportunity. In Projectile, leads and opportunities are managed in one object, the "sales funnel".

The "sales funnel" is created in the sales activity in the "Sales" tab using the "New" functionality in the "Opportunities" field (as in the following example) or in the editable list view:

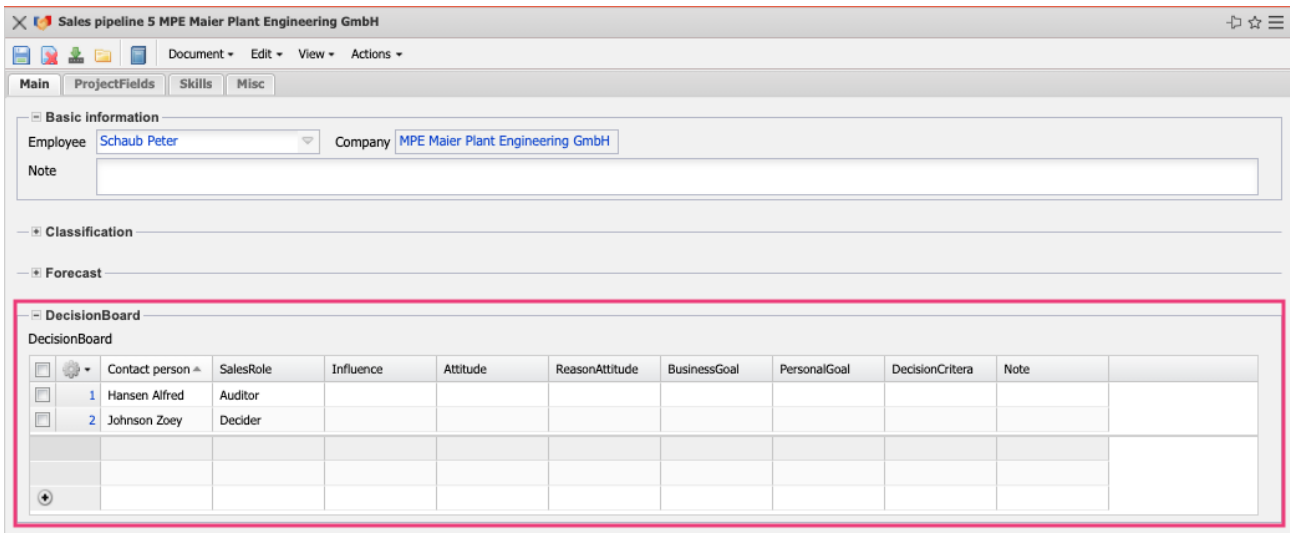


In the frame "Basic Information" the fields "Processor" and "Contact" are pre-filled by the system and then some lead classifications are entered (reference/product, sales phase, topic, potential and the need for action).

In the "Forecast" frame, information for the sales forecast is entered, especially the order probability, the potential incoming order and the potential order values (here three different order values, which are automatically added).

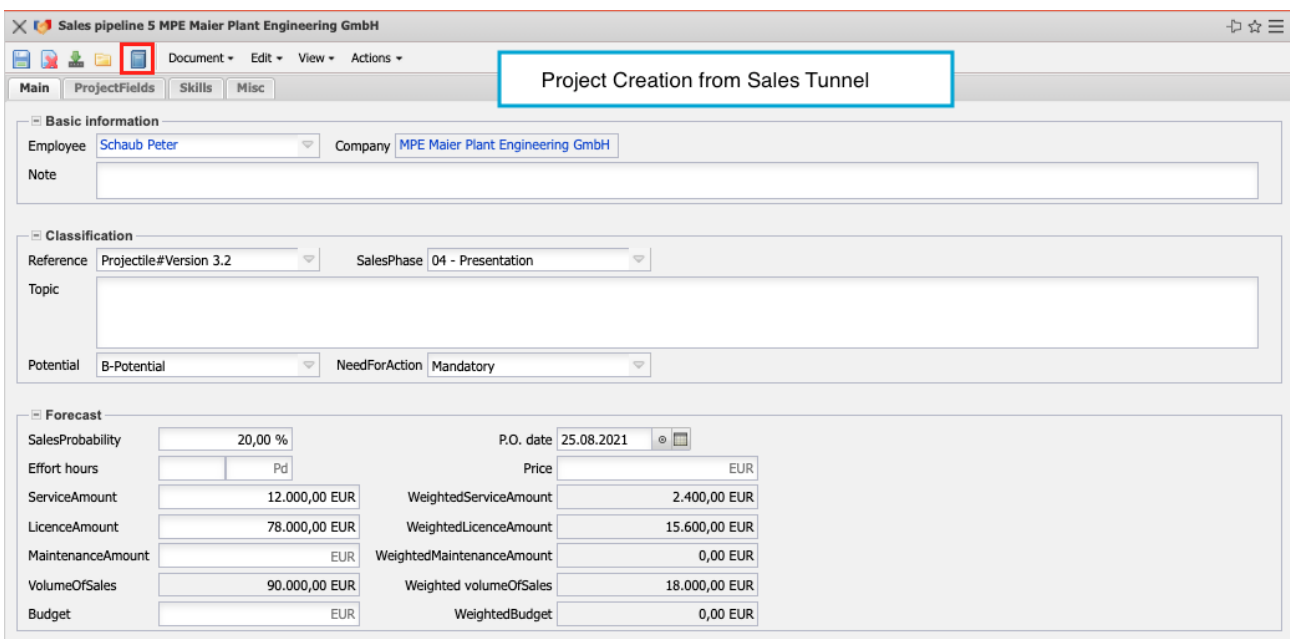


In the frame "Decision Maker" the persons involved in the acquisition can be



entered with their roles in the sales process, their influence, their attitude and further attributes.

A project can be created from the sales funnel using the "Create Project" action.



The key values of the sales funnel (especially the information of the tab "Project plant") are transferred to the mask "Project" (see also part 4).

## **2.7 Further CRM Functionalities**

Further typical CRM functionalities, such as calculation, quotation creation, order management or invoicing can be found from part 4 of this help.