

# Projectile Version 5.9

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

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

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### 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.

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Customer relationship manage			Abbreviation +	Company name	Category	Gener	al data	Mark	eting Sal	es Addre	sses & Comr	nunication Fina	ncial data 🕺 Mise	c)		
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Contact persons			2 CSH	Consult AG	Customer - Su	- BB	asic in	formation	1		-					
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(==) Campaign	•	m	4 MBG	Maschinenbau	Customer	Com	pany n	ame	Consult AG							
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Queries											110000011					
Human resources			CRM Module	•		Note										
Project management		-				-										
P g Purchasing and procurement		s	Search for Con	tact		-+ \$	tructur	0								
Offer and order																
Tracking		Г	Opening a	Contact from	n	EC	ontact	person								
▷ 💽 Billing		L	the Co	ontact List			@•	Salutatio	n Title	Last name	First name	Function	Phone number	Mobile number	Email Address	
Ticket management							1	Mrs.	Dr.	Nahl	Lisa	Geschäftsführung	089 / 7312-100	089 / 12 20 120	nahi@consult.de	
Risk management							2	Mr.	Doctor I	Sander	Peter	Geschäftsführung	089 / 73 13 105	0172/ 67 90 760	sander@consult	
Query manager						۲		-	-				+4989 7300100		1	
Team calendar																
and the second s																
Forum																
Sticky Notes	۲															
Settings																
A B. B. andre																

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	Addres	ses & Comm	unication	Financial data	Misc									
Basic inform	mation															
Abbreviation					Category											
Company name	e															
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Old company																
Blocked	-			Reason	for blocking							1				
Note				Neuson	I'DI DIOCKING								 	 		-
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C Characture																
- the Structure -																
- Contact per	rson															
🗖 🏟 • Sa	alutation Title	Las	t name 4	First name	Function	Phone nur	nber	Mobile nun	nber	Email Addres	ss					

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 ...

ATTACK MALE AND ADDREED 117	arketing Sales Addr	esses & Communication Fi	nancial data M	isc		
<ul> <li>Basic informa</li> <li>bbreviation</li> </ul>	MPE	Category Cus	tomer	\ \		
ompany name	Maier Plant Engineering	GmbH				
ld company						
ame						
locked		Reason for blocking				
ote						
ote						
Structure						

... 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.

ompany	MPE Maier Plan	nt Engineering G	imbH							-₽ ☆ Ξ
) 😰 🕹 🚞		Document + 8	idit + View +	Back referenc	es + Actions +					
eneral data	Marketing	Sales Addres	ses & Commun	ication Fi	nancial data Misc					
- SelectionC	riterions									
Туре	Company		$\bigtriangledown$	Industry Oth	er	9	1			
First contact	Network partn	er	$\bigtriangledown$	Partner MB	G Maschinenbau GmbH	9				
Sales category			Tou Fou	Indation	0		Number of			
							employees			
KAM	Jahnke Kevin		Repres	entative		0	·			
Related cor	mpanies									
🖻 🗇 • C	ompany name +	Street	Postal code	City	Customer n	umber \	/endor number	Phone number	Web address	
E Campaigns										
	under an	Description			Consider dates	Comes		Conversion data	Compolen and	

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) ...

Compa	my MPE Maier Pl	ant Engineering	g GmbH		-口 公 :
. 🔒 🛓	a 🖂 🗧 😹	Document +	Edit + View + I	ck references - Actions -	
General data	Marketing	Sales Add	resses & Communi	tion Financial data Misc	
Address					
Street					
Postal code			City		
Country	Germany		Language	erman 🗢	
Phone number Fax number Email Addre Web addres	ss			ව ච	
- Addition	al addresses —				
•	Address type	Street	Postal code	City	
	Dilling address	Connonwoo 2	10210	Berlin	
1	Billing address	Somerwey 2	10210		

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

🗙 📢 Compa	ny MPE Maier Pla	ant Engineering Gm	ьн		-□ ☆ Ξ
-	. 🖂 📑 😹	Document + Edit	t • View • B	ck references • Actions •	
General data	Marketing	Sales Addresse	s & Communic	tion Financial data Misc	
- Address					
Street					
Postal code			City		
Country	Germany		Language	erman 🗢	
number Fax number Email Addres Web address	55			<del>ව</del>	
Addition	al addresses —				
D @-	Address type	Street	Postal code	City	
1	Billing address	Sonnenweg 2	10210	Berlin	
۲					

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.

Company MPE Ma	aier Plant Engineering GmbH			☆☆目
🛾 🗟 🛓 🗀 🖂 🚺	🚽 🔤 Document + Edit + View + Back refe	rences - Actions -		
General data 🗍 Marke	ting Sales Addresses & Communication	Financial data Misc		
- Accounting				
Customer number 82	31	Vendor number		
─ lnvoice data —				2
Value added tax	MwSt-D-19%	VAT ID		
Terms of payment	▽	Payment target	30	
Cash discount	%	Discount	%	
Tax number		Own supplier number	4356668	]
Currency	EURO	External hourly rate	EUR	
ExternalPriceForTickets	EUR			
E Account data				
Bank name				
TRAN		RIC		
IDAN				
Account		Bank code		

### 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 ...

Compa	ny MPE Ma	ier Plant En	gineering	GmbH								☆☆目
		Do	cument +	Edit - Viev	v 🕶 Back refere	nces + Actions +						
General data	Market	ing Sale	Addre	sses & Com	munication	Financial data 🗍 M	lisc					
Basic inf	ormation											
Abbreviation	M	PE			Category C	ustomer	$\bigtriangledown$					
Company na	me M	aier Plant Er	gineering (	GmbH								
Old compon												
name												
Blocked	E	]		Reasor	n for blocking							
Note	Γ											
- E Structure	,											
Parent												
company												
Subordinate	company											
	Company r	name =	Categor	ry	Street	Postal code	City	Customer number	Vendor number	Phone number	Web address	
۲												
- Contact	person											
	Calutation	Title			Punching	Phone number	Mobile number	Email Address				
•	Salutauon	riue	Last name -	<ul> <li>Hirst name</li> </ul>	Function	Phone number	Mobile number	Email Address				

#### ... subsidiaries or branches are created.

Basic Inform breviation	Marketing Sales nation MPE	Addresses &	Communication	Financial data	Micc					
Basic inform bbreviation ompany name	MPE				Phise					
bbreviation ompany name	MPE									
ompany name			Category	Customer	▽					
	Maier Plant Eng	ineering GmbH								
a company ame										
ocked		R	eason for blocking	1						
ote			-							
arent ompany										
ubordinate com	mpany									
Cor	ompany name A	Category	Street	Postal code	City	customer number	vendor number	Phone number	web address	
1 Mai	aler Medical Technolo	Customer								
	and theorem rectificity	costonici						1		
•										
Contact pers	son									

### **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 ...

eneral data Ma	arketing Sales Addres	ises & Communication	Financial data	Misc			
Basic informati	tion						
bbreviation	MPE	Category	Customer	▼			
Company name	Maier Plant Engineering G	imbH					
	1						
old company							
Id company ame					-		
ld company ame locked		Reason for blocking					
old company ame locked ote		Reason for blocking					
old company ame locked lote		Reason for blocking			]		
ld company ame locked ote Structure		Reason for blocking					
Id company ame locked lote E Structure		Reason for blocking					

... the contact persons are created.

🕻 🚺 Company MPI	E Maier Plan	t Engineering (	GmbH				☆☆目
i 📔 🛓 🗀 🖂		Document +	Edit • View • Back re	ferences + Actions +			
General data Ma	rketing	Sales Addre	sses & Communication	Financial data	Misc		
Basic informati	on						
Abbreviation	MPE		Categor	y Customer			
Company name	Maier Plan	nt Engineering G	GmbH				
Old company							
Blocked			Reason for blockin	9			
Note							
Structure     Contact persor	1						
📄 🎲 + Saluta	tion Title	Last name 4	First name Function	Phone numbe	r Mobile number	Email Address	
🔲 1 Mr.		Hansen	Alfred			Alfred.Hansen@	
2 Mrs.	Dr.	Johnson	Zoey			Zoey.Johnsons	
۲							
	1				·		

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

🗙 🚨 Contact	person Johnson Zoey			☆☆目
3 🔒 🛓 🖿	। 🖂 🚔 🚔 🚺 Document + Edit + V	fiew + Actions +		
General data	History Details Private Misc			
Basic info	rmation			
Company	MPE Maier Plant Engineering GmbH	Ту	e 🗢	
Salutation	Mrs. 🗢	Ti	e Dr. 🗢	
Last name	Johnson	First nar	e Zoey	
Department		Function	n	
Blocked		Reason for blocki	9	
Note				
- E Address -				
Street	Sonnenstr. 12			
Postal code	10210	City B	erlin	
Country	Germany 🗢	Language G	erman 🗢	
Phone numbe	r	Fax number		
Mobile				
number				
Email Address	Zoey.Johnsons@mpe.com	Ð		

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, followups 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 ...

	rson Johnson 2	Zoey							-	Þ☆∃
) 😰 🚣 💼 🛙	3 5 8 1	Documer	nt + Edit + View	- Actions -						
General data	History Det	ails Private	Misc							
- Actions										
E @•	Date 🛎	Employee	Type of action	Note	Chec					
<ul> <li>25.0</li> </ul>	06.2021 00:00	Schaub Peter								
E Campaigns										
🕅 🎲 • Nun	nber	Description		Car	npaign status	Campaign category	Campaign start	Campaign end		
- Meetings										
🔲 🎲 - Title	e	From	То	Торіс	Location	Notes				
۲		25.06.2021 11:46	25.06.2021 11:46							
Dates										
📄 🎲 - Nan	ne	Category	From		To Inviter					

... actions are created.

0		ct person Johnson	LOCY								6- 44 ·				
	2 0	🚔 🖾 🖂	📓 🔰 🛛 Documer	nt - Edit - View	<ul> <li>Actions -</li> </ul>										
enera	al data	History De	tails Private	Misc											
- Ac	tions														
	@ •	Date +	Employee	Type of action	Note	Chec									
	1	22.06.2021 11:48	Otto Frauke	Presentation		V									
	2	25.06.2021 18:00	Schaub Peter	General call											
۲		25.06.2021 00:00	25.06.2021.00:00 Schaub Peter			<b>m</b>									
- Ca	impaig	gns Number	Description		Cam	paion status	Campaign category	Campaign start	Campaign end						
- Ca	impaig @ • eetings	gns Number S	Description		Cam	paign status	Campaign category	Campaign start	Campaign end						
- Ca	impaig • • • • • • • •	gns Number s Title	Description	То	Cam	paign status	Campaign category Notes	Campaign start	Campaign end						
- Ca	empaig • • • • • • •	gns Number s Title	Description From 25.06.2021 11:48	To 25.06.2021 11:48	Cam	paign status Location	Campaign category Notes	Campaign start	Campaign end						
- Ca	eetings	ns Number s Title	Description From 25.06.2021 11:48	To 25.06.2021 11:48	Cam	Location	Campaign category Notes	Campaign start	Campaign end						

### 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:

G Com	pany MPE M	aier Plant En	,								
2		Do	ument + Edit + V	/iew + Back i	references + Acti	ions +					
eneral da	ta Marke	ting Sale:	Addresses & Co	ommunicatio	n 🗍 Financial d	ata Misc					
- Oppor	tunities										
- Q	Reference		SalesPhase A		Potential	NeedFo	Action	SalesProbability	P.O. date	VolumeOfSales	Weig
	Sales Pipe	lines								0,00 EUR	
•	New							0,00 %			
	Print										
к 💼	Report	-									
		-									
isu 🚠	ListToDock		0,00 El	UR							
ffer 💷	ListToDock ToOverview		0,00 E	UR							
ssu 👱 ffer 💷 rde 🥣	ListToDock ToOverview Clear	-	0,00 El 0,00 El 0,00 El	UR UR UR							
ssu 👱 ffer 💷 rde 🥣	ListToDock ToOverview Clear Filter	-	0,00 El 0,00 El 0,00 El 0,00 El	UR UR UR							
ssu 🚠 Iffer 🗊 Irde 🥣 Ivoi	ListToDock ToOverview Clear Filter InvoiceNet		0,00 El 0,00 El 0,00 El 0,00 El	UR UR UR							
ssu 🗻 ffer 🗊 rde 🥣 nvoi ncoming]	Clear Filter		0,00 El 0,00 El 0,00 El 0,00 El 0,00 El	UR UR UR							
ffer 💼 rde 🛒 ivoi icoming]	ListToDock ToOverview Clear Filter InvoiceNet		0,00 EI 0,00 EI 0,00 EI 0,00 EI	ur ur ur							
ssu 👱 iffer 🗊 irde 🥑 nvoi ncoming) Meetin	Clear Filter InvoiceNet	Title A	0,00 EI 0,00 EI 0,00 EI 0,00 EI	JR JR JR	Торіс	From	То				
SSU 👱 Offer Nrde 🥣 nvoi ncoming)	Clear Filter InvoiceNet - Id 00006	Title *	0,00 EI 0,00 EI 0,00 EI 0,00 EI	JR JR JR	Торіс	From 25.06.2021 11:50	To 25.06.2021 11:50				
ssu 👱 offer 🗐 orde 🥣 nvo ncoming) Meetin ()	Clear Filter InvoiceNet Jogs Id 00006	Title =	0,00 EI 0,00 EI 0,00 EI 0,00 EI	JR JR JR	Торіс	From 25.06.2021 11:50	To 25.06.2021 11:50				
ssu 👱 iffer 🗐 hvoi ncoming) Meetin () () () () () () () () () () () () ()	ListfoDock ToOverview Clear Filter InvoiceNet • Id 000006	Title *	0,00 EI 0,00 EI 0,00 EI 0,00 EI	JR JR JR	Торіс	From 25.06.2021 11:50	To 25.06.2021 11:50				

In the frame "Basic Information" the fields "Processor" and "Contact" are prefilled 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).

🗙 🔰 Sales pipeline 5 MP	E Maier Plant Engineering Gm	ьн		-0 ☆ Ξ			
📄 🙀 🏦 🚞 📑 🛛 Do	ocument - Edit - View - A	ctions -					
Main ProjectFields	Skills Misc						
─							
Employee Schaub Peter	mployee Schaub Peter 🗢 Company MPE Maier Plant Engineering GmbH						
Note							
- Classification							
Reference Projectile#Ve	rsion 3.2	SalesPhase 04 - Presentation	×				
Торіс							
Potential R-Potential		dForAction Mandatory					
Di decidar		( indicatory					
- E Forecast							
SalesProbability	20,00 %	P.O. date 25	5.08.2021 0				
Effort hours	Pd	Price	EUR				
ServiceAmount	12.000,00 EUR	WeightedServiceAmount	2.400,00 EUR				
		WeightedLicenceAmount	15.600,00 EUR				
LicenceAmount	78.000,00 EUR	reightedescencerthount					
LicenceAmount MaintenanceAmount	78.000,00 EUR	WeightedMaintenanceAmount	0,00 EUR				
LicenceAmount MaintenanceAmount VolumeOfSales	78.000,00 EUR EUR 90.000,00 EUR	Weighted Weighted volumeOfSales	0,00 EUR 18.000,00 EUR				

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

<b>10</b> S	iales p	pipeline 5 MPE Ma	ier Plant Engine	ering GmbH							
	2.0	Docum	ent - Edit - V	/iew + Actions +							
lain	Proj	ectFields Skills	s Misc								
Ba	sic in	formation									
Emplo	yee	Schaub Peter		Company M	PE Maier Plant Eng	gineering GmbH					
Note											
• Cla	assific	ation									
• Cla	assific	ation									
T For	racael										
æ ro	recasi										
- De	cision	Board									
Decisi	onBoa	ird									
	<u>ن</u>	Contact person +	SalesRole	Influence	Attitude	ReasonAttitude	BusinessGoal	PersonalGoal	DecisionCritera	Note	
	1	Hansen Alfred	Auditor								
	2	Johnson Zoey	Decider								

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.

🗙 🔰 Sales pipeline 5 MP	E Maier Plant Engineering Gm	ьн		-0 ☆ ⊟
Main ProjectFields	ocument - Edit - View - A Skills Misc	ctions - P	roject Creation from S	ales Tunnel
Basic information				
Employee Schaub Peter	♥ Com	pany MPE Maier Plant Engineeri	ng GmbH	
Note				
Classification				
Reference Projectile#Ve	rsion 3.2 🗢 S	SalesPhase 04 - Presentation	♥	
Торіс				
Potential B-Potential	♥ Nee	dForAction Mandatory		
- Forecast	20.00.01	20.44	25 00 2024	
SalesProbability	20,00 %	P.O. date	25.08.2021 0	
Effort hours	Pd	Price	EUR	
ServiceAmount	12.000,00 EUR	WeightedServiceAmount	2.400,00 EUR	
ServiceAmount LicenceAmount	12.000,00 EUR 78.000,00 EUR	WeightedServiceAmount WeightedLicenceAmount	2.400,00 EUR 15.600,00 EUR	
ServiceAmount LicenceAmount MaintenanceAmount	12.000,00 EUR 78.000,00 EUR EUR	WeightedServiceAmount WeightedLicenceAmount WeightedMaintenanceAmount	2.400,00 EUR 15.600,00 EUR 0,00 EUR	
ServiceAmount LicenceAmount MaintenanceAmount VolumeOfSales	12.000,00 EUR 78.000,00 EUR EUR 90.000,00 EUR	WeightedServiceAmount WeightedLicenceAmount WeightedMaintenanceAmount Weighted volumeOfSales	2.400,00 EUR 15.600,00 EUR 0,00 EUR 18.000,00 EUR	

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.