Projectile
Version 5.9

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

# Help, Part 2: Contact Management, CRM

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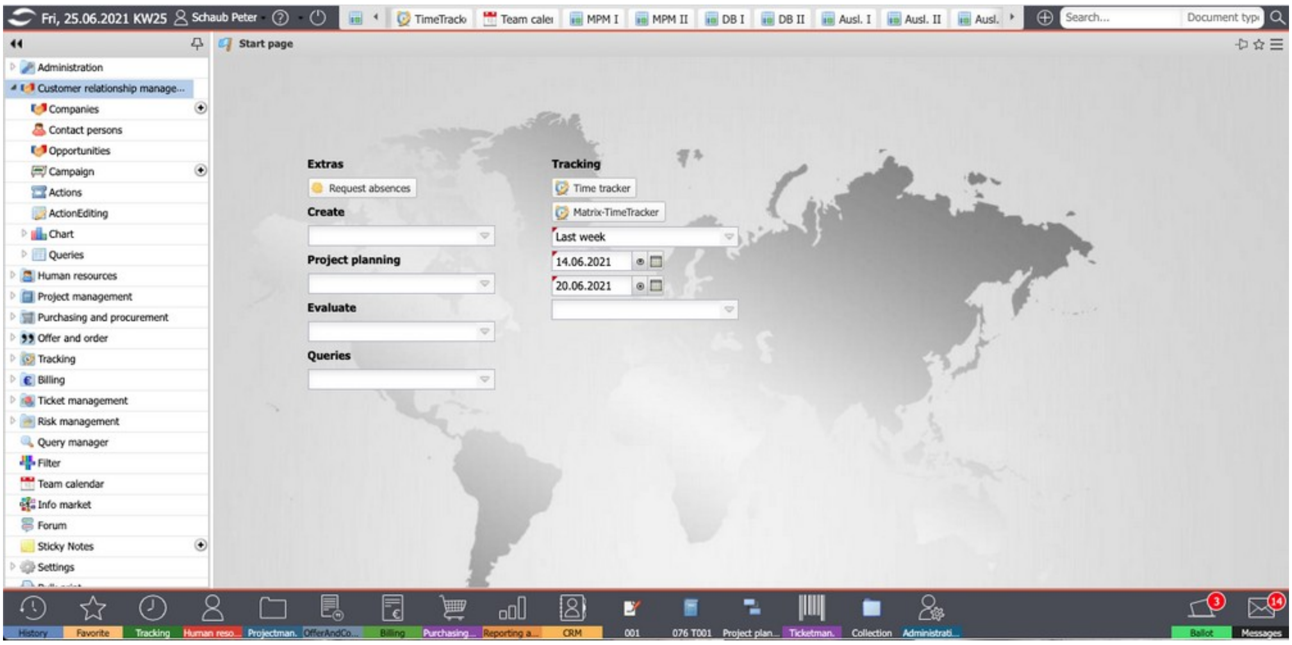
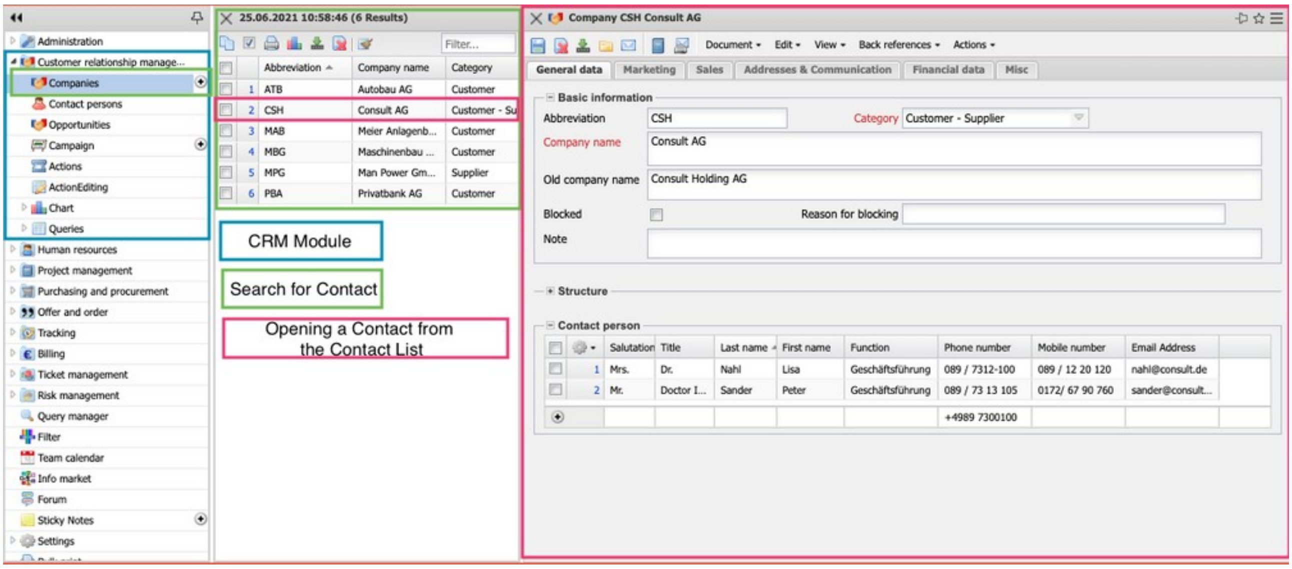
# 2.1 Contact Management, CRM




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".

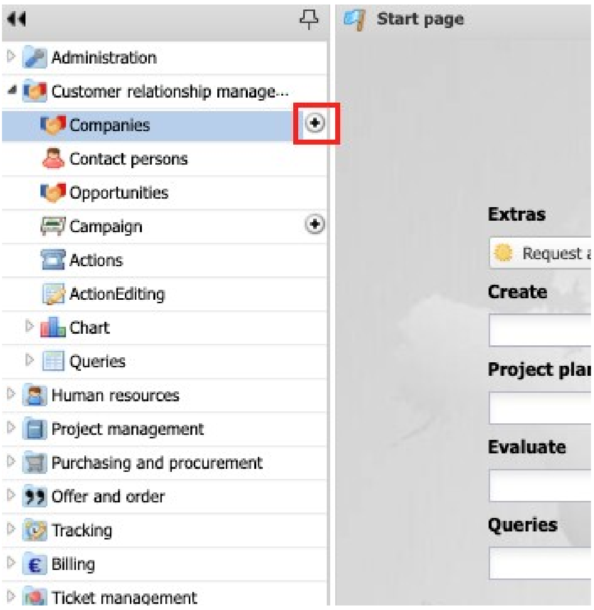
In the main menu "CRM" you will find, among others, the entries for "Contacts" "Contact person", "Sales funnel" and "Promotions". Here the user can (depending on the authorization) search in the existing contact data and view, change and also delete data.



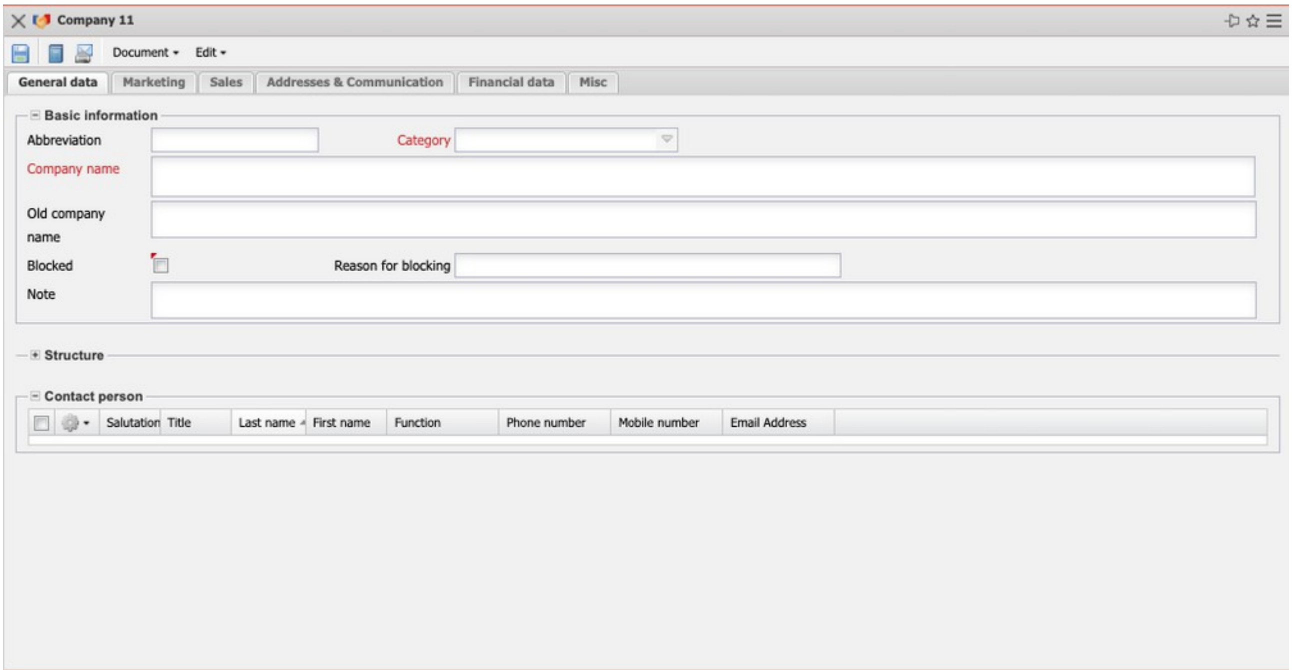

More information about the "User Interface" and "Search and Find" can be found in part 1 of the help.

## 2.2 Contacts

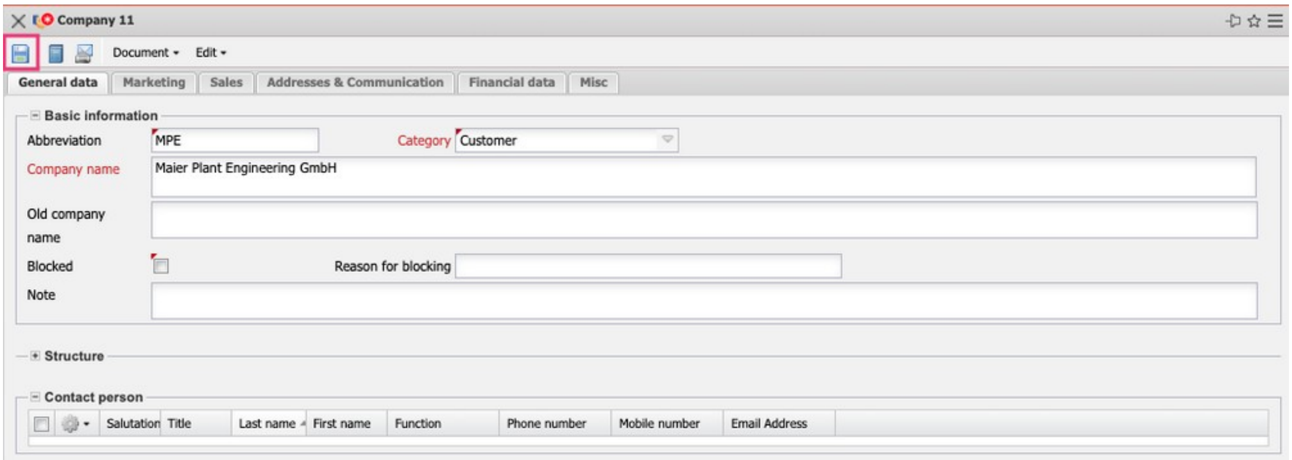
The "Contact" mask manages all contacts with their contact persons. Contacts can be customers, interested parties and suppliers, among others. Each contact can be subdivided as desired and can have any number of contact persons. In the following example a new contact is created with the help of the "+"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



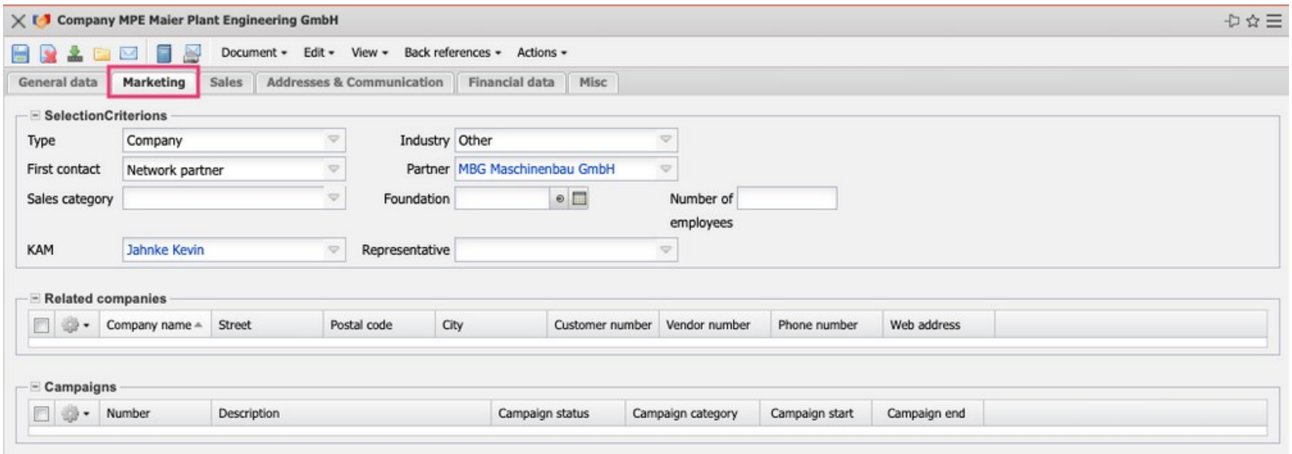

First a new record of the type "Contact" opens with some default settings:




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 ...



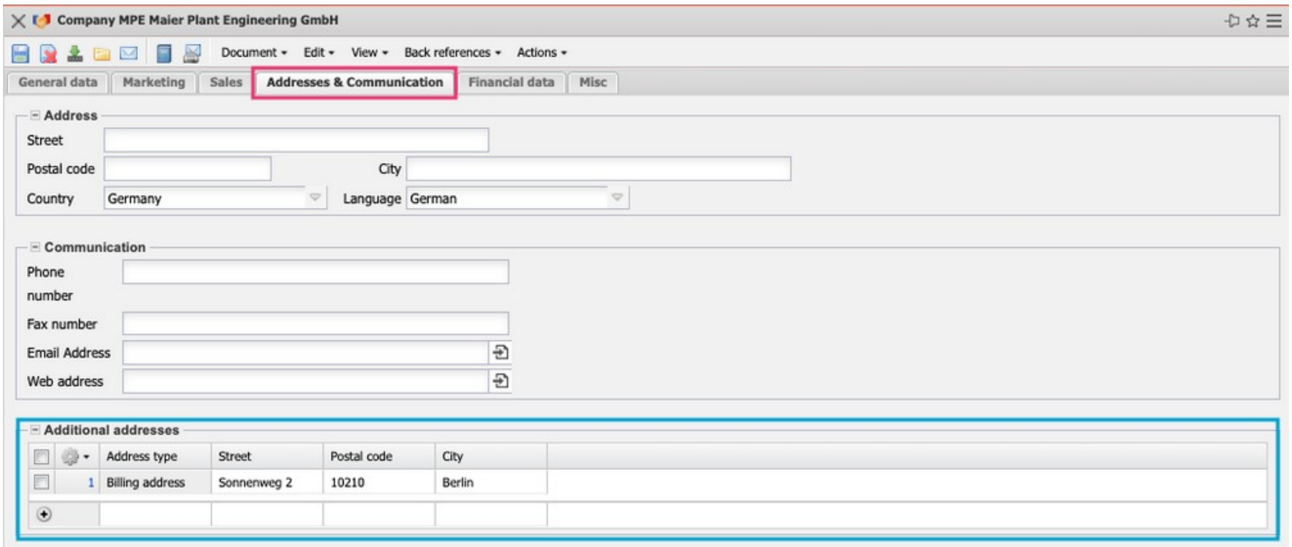

... and switched to the "Marketing" tab. Here, various classifications for the contact can be stored. In addition to the industry sector, foundation, number of employees, turnover and further information, the category of the first contact, partner and processor (key account manager and representative)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



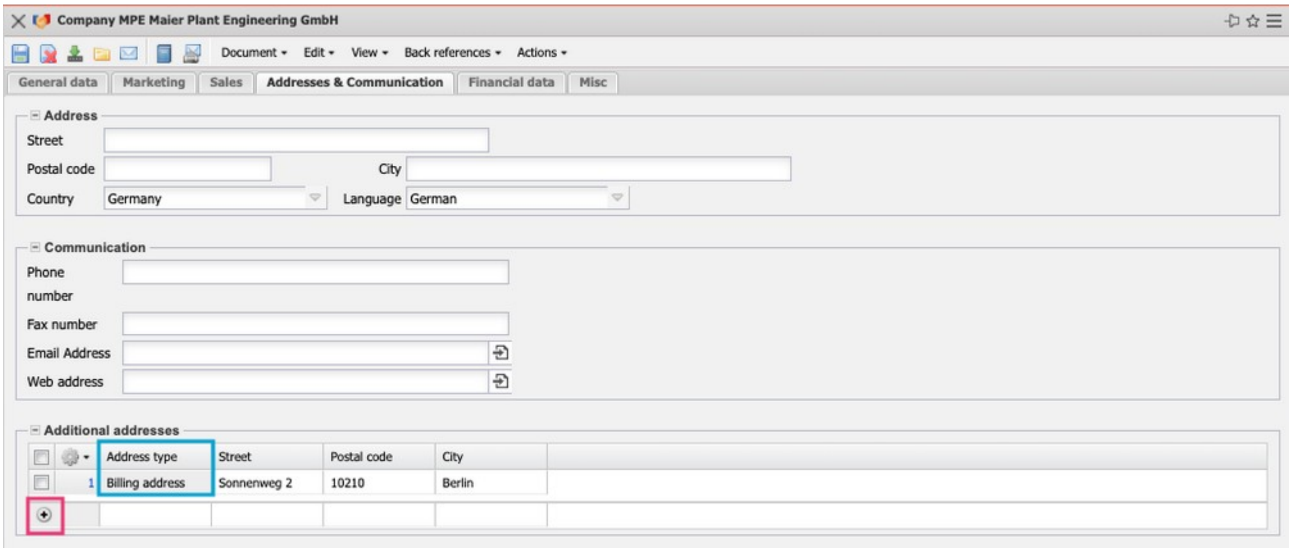
The "Sales" tab will be described separately later (see also "Sales funnel").

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.

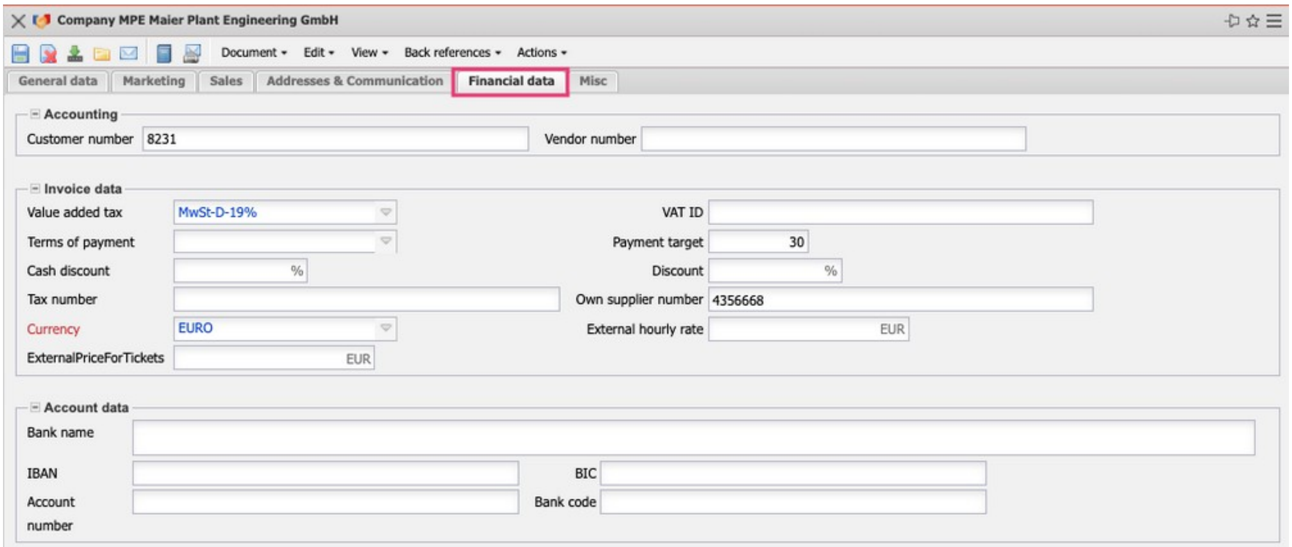
If different addresses are required (for example, for different billing or delivery addresses) ...



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

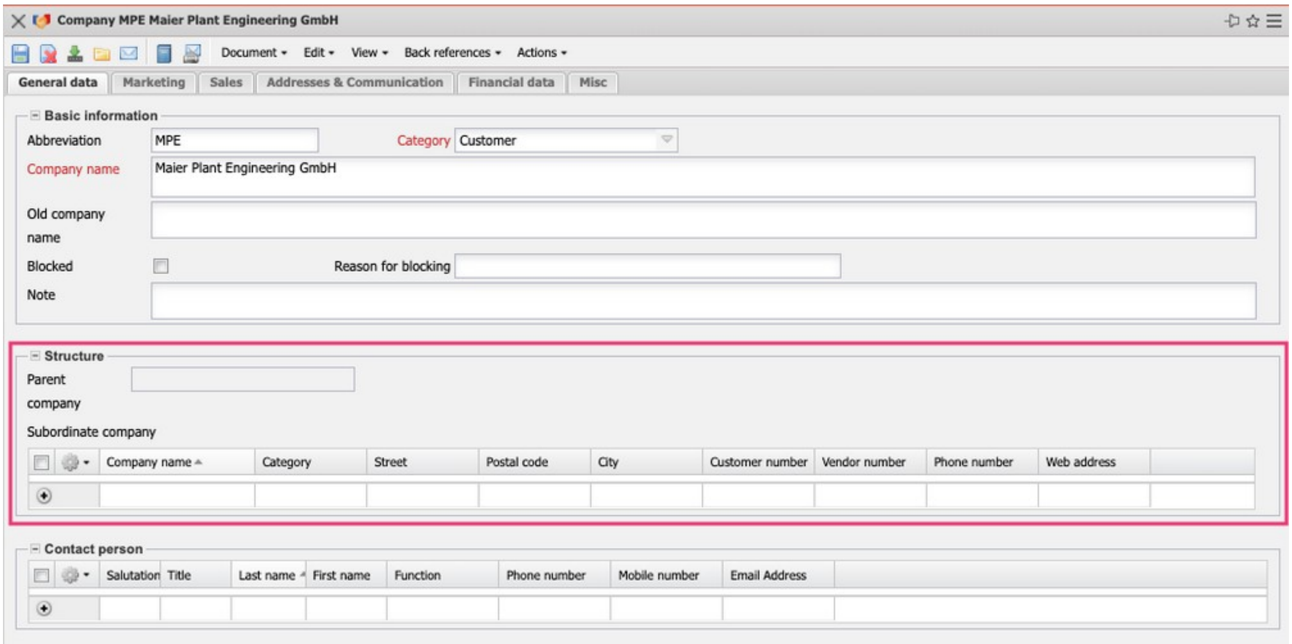


In the "Finances" tab, the default settings for the "Billing module" can be stored for the contact. These include, among other things, the sales tax, the payment conditions or the own supplier number for the outgoing invoices.

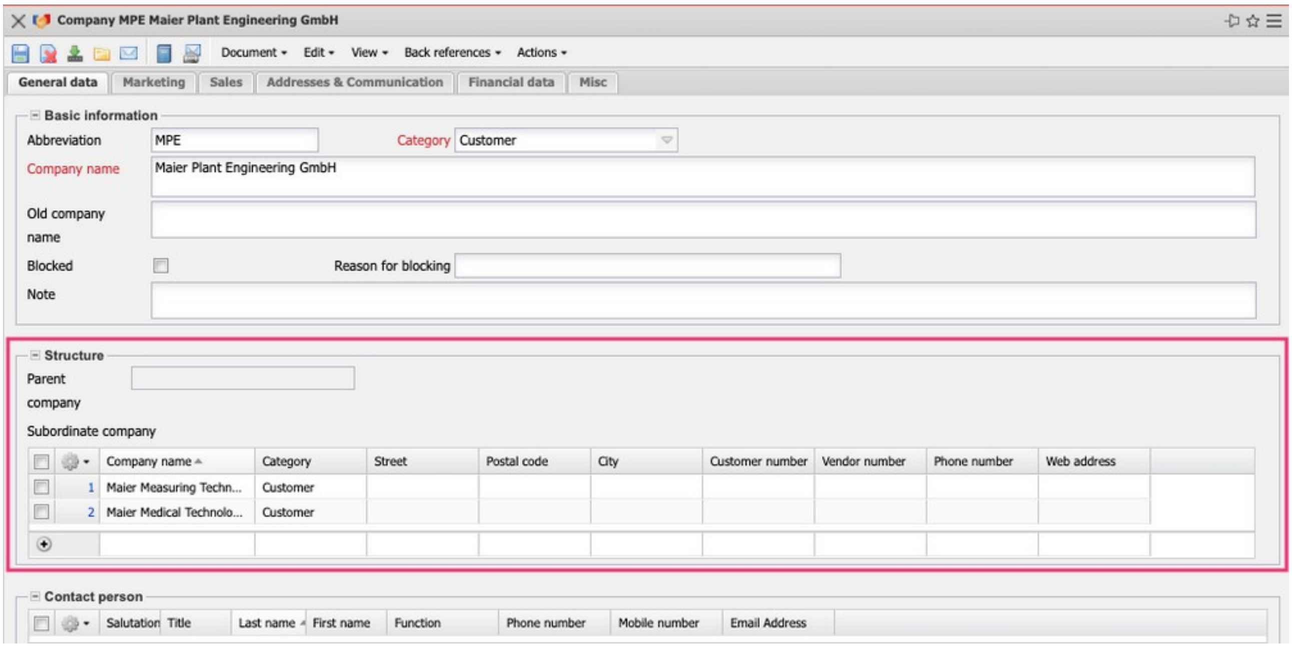


## 2.3 Divide Contacts

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 …



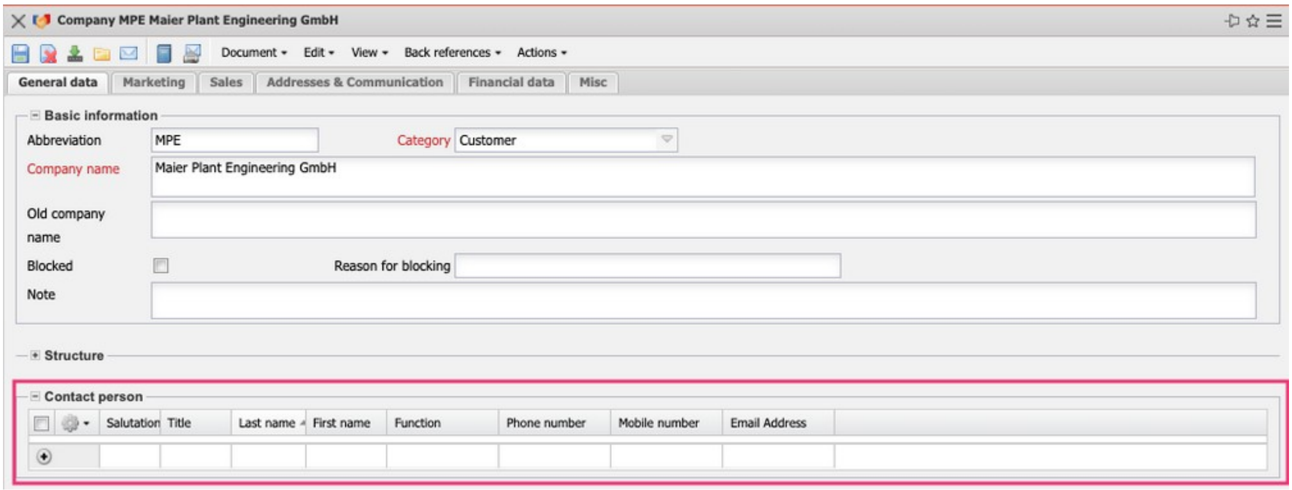

... subsidiaries or branches are created.



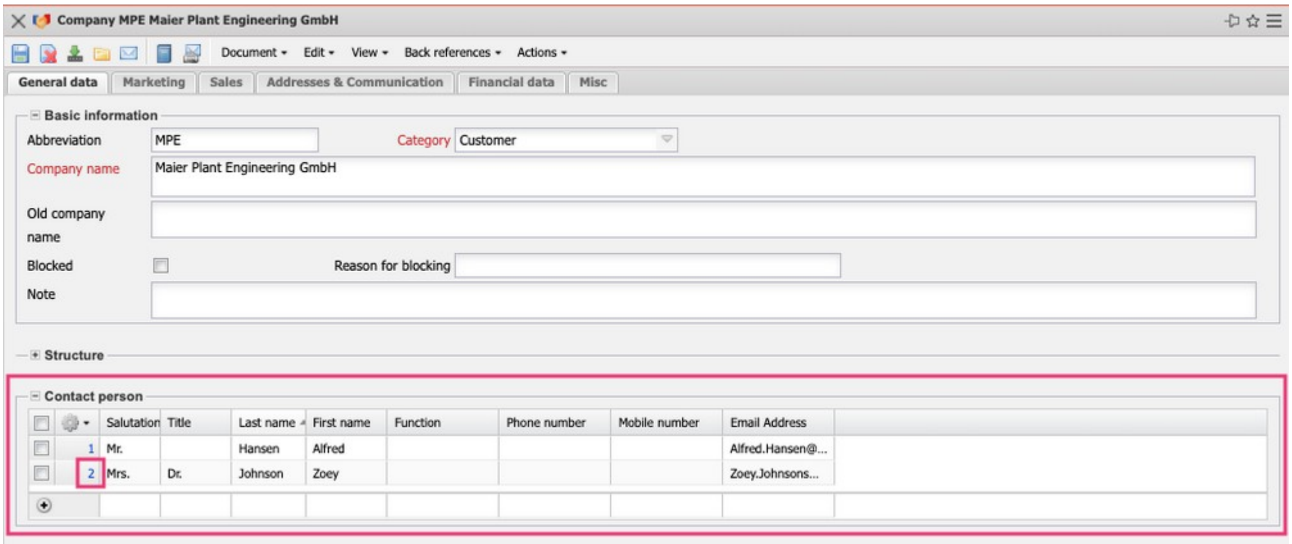

## 2.4 Create Contact Person

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".

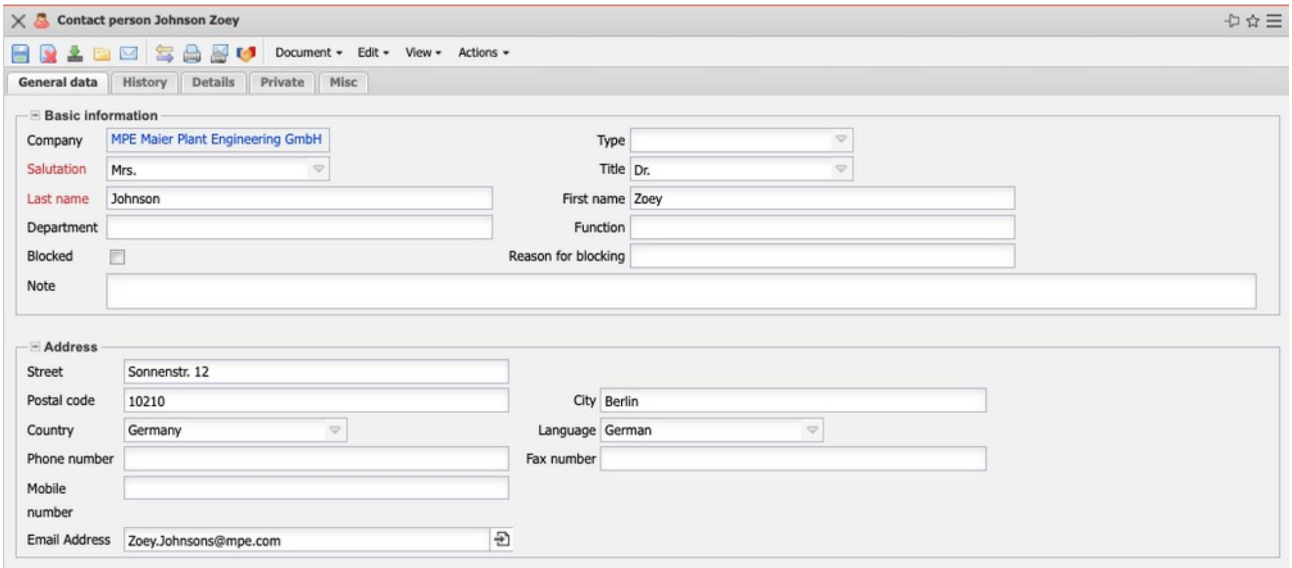
Using the "New" function in the "Contact person" field or (as in the following example) in the editable list view ...



... the contact persons are created.



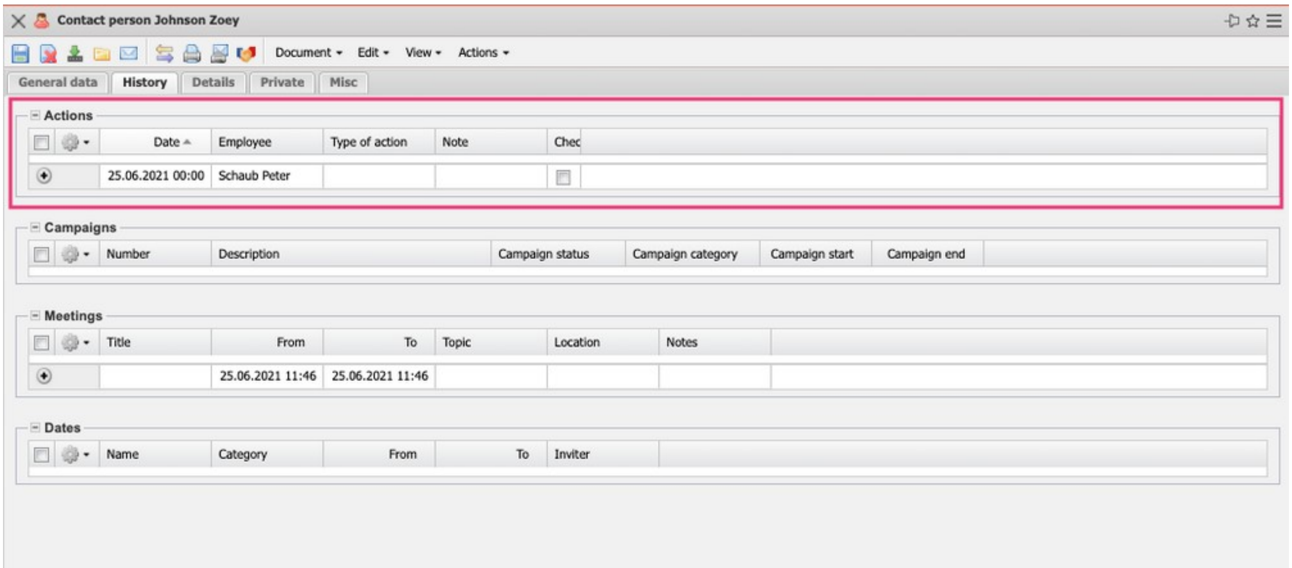
The data can then be supplemented in the "Contact Person" mask:



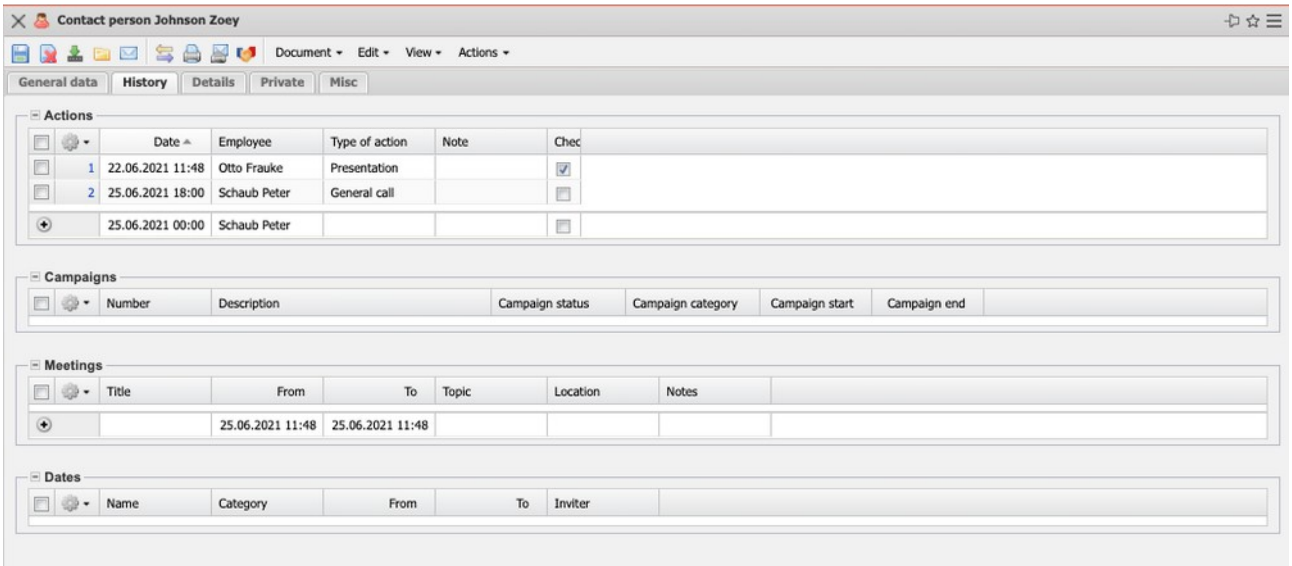

On the "Details" tab, you can enter, among other things, the office, supervisor, assistant, profession and organization. On the "Private Details" tab you can enter your private telephone number, mobile number, fax and e-mail, web and postal address and other private information.

## 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 ...



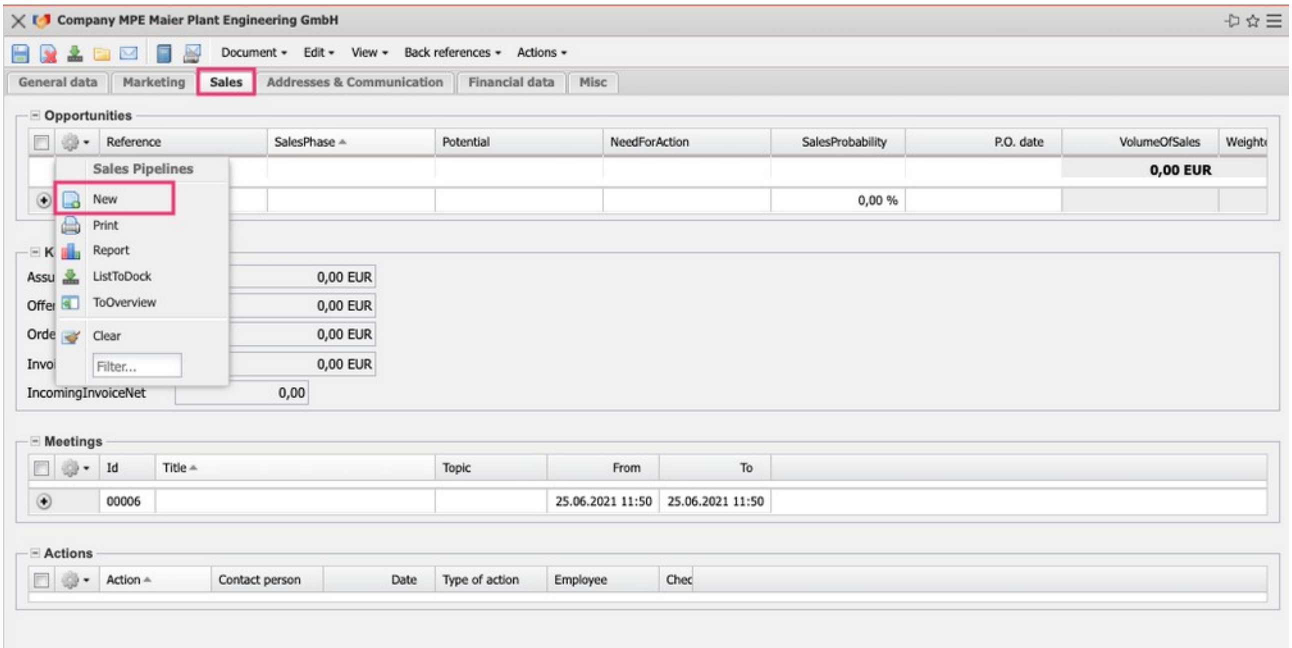
... actions are created.




## 2.6 Manage Sales Funnels

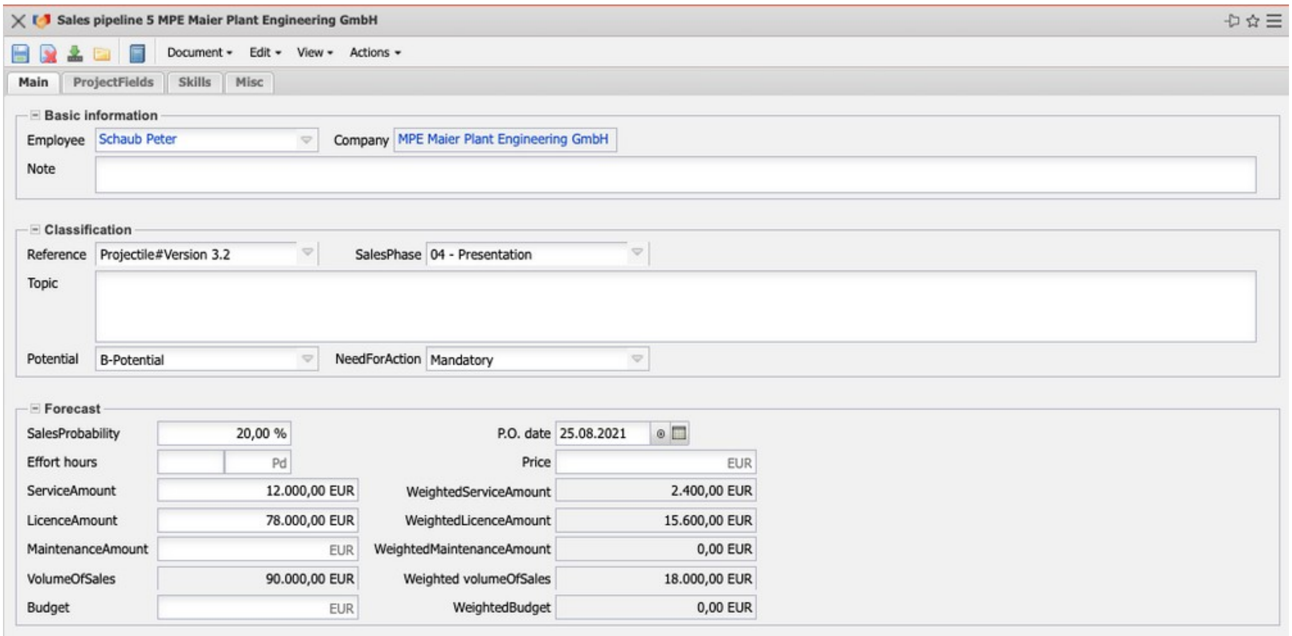
Opportunity Management comprises the generation, recording, mapping, controlling and evaluation of sales opportunities. An opportunity arises from a lead (for example, a contact inquiry via the website or a trade fair contact). If this contact has been checked and qualified and if there are good chances 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:

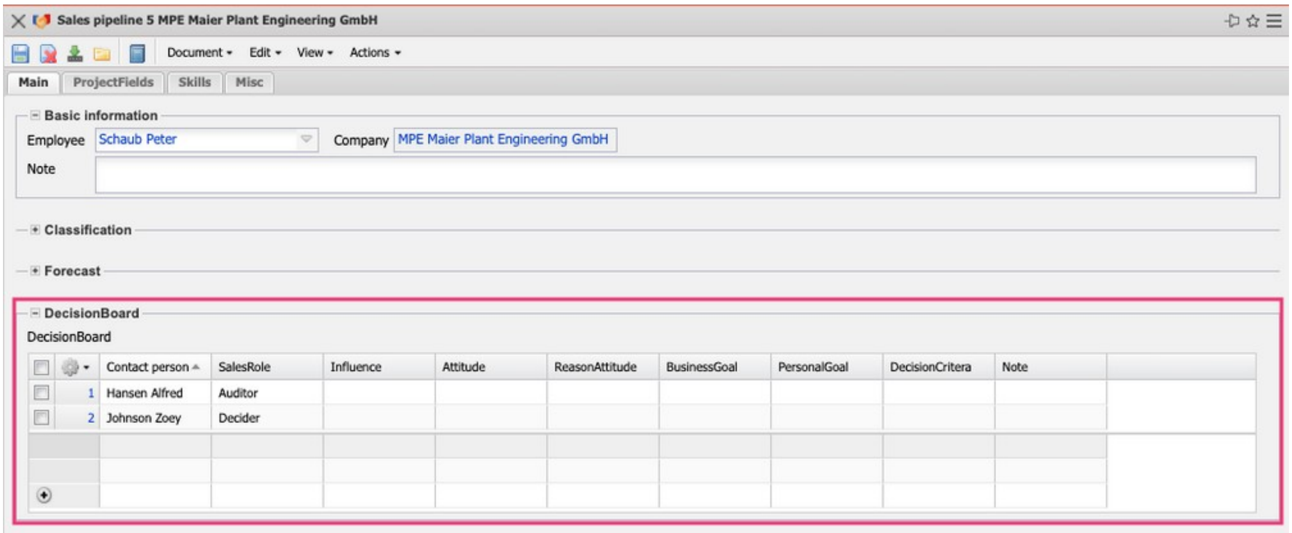



In the frame "Basic Information" the fields "Processor" and "Contact" are pre-filled by the system and then some lead classifications are entered (reference/product, sales phase, topic, potential and the need for action).

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).

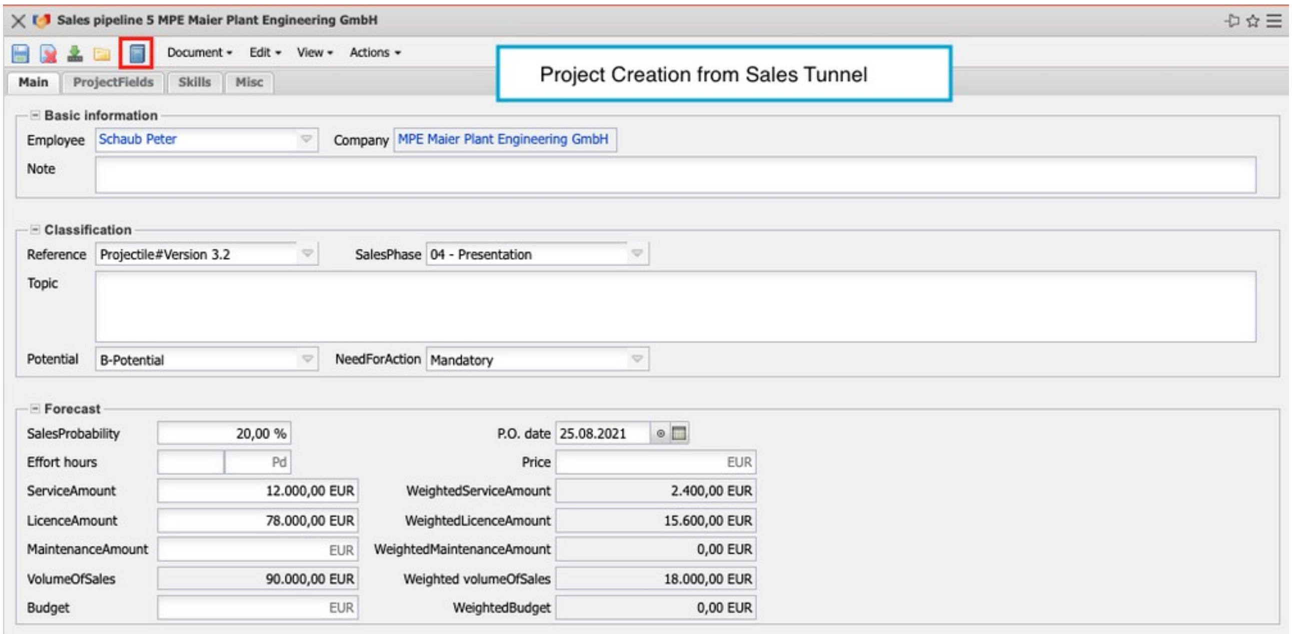



In the frame "Decision Maker" the persons involved in the acquisition can be




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.