Baseplan Enterprise Training
- Session Outline

Session: Customer Relationship Management (CRM)

Description:
This session is designed to give attendees both a general overview of the CRM module of Baseplan Enterprise as well as more advanced processing. This session is designed for sales reps and customer managers and will provide participants with the competencies to set up, manage and generally use the CRM module.

What you will learn (Objectives):
- Add, lookup, edit and manage company master records
- Add, lookup, edit and manage company sites and contact records
- Add, lookup, edit and manage enquiries
- Enter notes and to-do items that will integrate with your calendar
- CRM Enquiry Wizard
- CRM reporting

What you need to know (Pre-requisites):
Before attending this session, participants must have completed the Baseplan Enterprise - Orientation session and must be reasonably proficient with MS Windows. This includes confidence with use of the mouse and printing underneath Windows.

Length of session:
This session will take approximately 2 hours.

Session Content:

Introduction:
- Your presenter (Experience)
- Session objectives (What you will learn)
- Attendees roles
- Housekeeping items (toilets, breaks, data to be used)

Company Screen:
- General Company fields
- Option buttons

Company Site Tab:
- Adding using right mouse click
- Viewing existing site details using right mouse
- Site fields

Site Contacts Tab:
- Adding using right mouse click (important for linking to a site)
- Viewing existing contact details using right mouse
- Contact fields

Enquiries Tab:
- Creating Enquiries (Use right click to link to contacts and sites)
- Viewing Enquiries
- Important Fields

Company Notes (Activities done):
- Note type (important for reporting)

Company To-Do (Activities planned):
- Adding using right mouse click for linking
- To-Do type (important for reporting)
- Completion date
- Due date, Due time links to calendar
- Reminders (don't use at this stage, Outlook will remind anyway)

Customer View Menu:
- Linked screens (Customer record, hire history, ageing)
- Reprinting invoices

Customer Operations Menu:
- Creating standard letter templates
- Creating (previewing) standard letters from existing templates

Search Screen:
- Finding by part of notes, or any field

Enquiry Wizard:
- Create company, site, contact, enquiry, note and to-do in one step.

CRM Reports:
- Current Enquiries
- Planned Activity (based on to-do's)
- Sales Activity (based on notes)

CRM Graph:
- Graph of activity based on group and category of company

Session Review
- Debtor master/site screens (displays all information and is link to history)
- Debtor view and operations menus
- Debtor invoices and payments

Questions

Thank you and Survey