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How to use this manual

Overview

<table>
<thead>
<tr>
<th>Introduction</th>
<th>This manual has been written to assist in using the eCRM system.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access aids</td>
<td>There are various access aids to help you to find the information required.</td>
</tr>
<tr>
<td></td>
<td>Table of Contents – The listing of this manual’s content, which is located at the front of the manual.</td>
</tr>
<tr>
<td></td>
<td>Topic titles – The major headings on each page, for example, the heading &quot;How to use this manual&quot; located on this page.</td>
</tr>
<tr>
<td></td>
<td>Block labels – The minor headings on each page for example, the heading “Access aids” located on this page.</td>
</tr>
<tr>
<td>Requirement</td>
<td>The user must ensure they have Adobe Acrobat Viewer Version 4 or above installed on their computer in order to display this PDF user manual correctly.</td>
</tr>
</tbody>
</table>
Introduction to eCRM

Overview

eCRM is a web-based connection to the Greentree Customer Relationships module used for capturing and viewing Organisation and Contact information electronically.

Organisations are all Organisations that you deal with, including Internal, Reseller, Prospect, Customer, Supplier or other. Each Organisation can have unlimited hierarchical relationships, so you can record details of branches, groups or subsidiaries.

Contacts are all people that your company deals with at a specific Organisation.
Navigation

**Introduction**
eCRM provides a variety of navigational tools that assists you in moving around the system quickly and easily, including:

- Mouse and keyboard
- Data entry
- Common buttons

*Mouse and keyboard* – you can use the keyboard to perform the same actions as the mouse. Some important keyboard actions are described below:

<table>
<thead>
<tr>
<th>Keys</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Links</td>
<td>A link is an underlined word that can be selected using the mouse or enter key. Once actioned, a pop up list / window opens. Example: Org Code 00001 - will display the detail for the Organisation</td>
</tr>
<tr>
<td>!</td>
<td>Display the online help for the Explorer program.</td>
</tr>
<tr>
<td>Alt-tab</td>
<td>Toggles between eCRM and other open Windows applications.</td>
</tr>
</tbody>
</table>

*Data entry* – data is entered into the field on a screen in three different ways. These entry methods are:

- Direct entry – to enter text into a field place the cursor inside the field and type in the data.

- Drop down list – this is a drop down list button. When selected, it displays a list of values. Select a value and it will display into the selected field.

- Pop up list – the binoculars icon is a search button. Click on the icon and a search pop up list box is shown. Enter search criteria, select the ‘Go’ button and a list of options is displayed. You select an option by using the mouse and once selected the option appears in the relevant field.
How to access and exit eCRM

Introduction
There are two ways you can access eCRM. These access methods are:
- local LAN
- Internet

Conditions
In order to access eCRM you need to be set-up in Greentree Preferences and have the following:
- Microsoft Internet Explorer version 5 or later

Procedure
How to log on:

1. From Microsoft Internet Explorer screen.
2. Select the File menu, select Open.
3. Enter the applicable eCRM location based on how access have been setup;
   - Access from the Local LAN - type the computer name eg. http://servername/eCRM
   - Access over the Internet - type the fully qualified domain name (FQDN) eg. http://www.mycompany.com/eCRM
4. Select OK.

   **If the....**
   eCRM Log in screen appears.

   **Then....**
   you have accessed the eCRM site.

Continued on the next page
5. Enter the User Name or Email address, Password, Company and select Log In.

**If the...**
eCRM Main screen appears.

**Then....**
you have accessed eCRM.

**Please note:**
- The Username is the Greentree User’s Username.
- The Password is the user’s regular Greentree password as setup in Greentree User Preferences, accessed via the System > Utilities > User Maintenance > More Preferences button. These eCRM users are referred to as Internal Users, as they are also Greentree Users.
- The Company drop-down lists all the Companies that are licensed for eCRM. <Default Company> refers to the Default Company set in Greentree User Preferences. Note: Company is only available if set in eCRM Greentree.ini. If not displayed, the system determines which company the user belongs to. If a User belongs to more than one company, the default company needs to be setup in the eCRM Greentree.ini file.
- The logged-in user is displayed on each page.

**External Users:** External Users can log into eCRM if the ‘Allow external login’ option is ticked in Greentree, eModule Control, eCRM tab. An external User does not have a Greentree Username, but is registered as a CRM Organisation or Contact. The external user logs into eCRM through one of the following:
  - CompanyCode-O rganisationCode: To gain access to eCRM at Organisation level. The Password is the Organisation’s eService password as maintained in Greentree Organisation Maintenance, Security tab.
  - CompanyCode-OrganisationCode-ContactCode: To gain access to eCRM at Contact level. The Password is the Contact’s eService password as maintained in Greentree Contact Maintenance, Security tab.

Greentree, eModule control, eCRM tab also hosts a setting which allows new External Users to register themselves and gain access to eCRM. If this option is turned on, the eCRM login screen displays a link which allows the new external user to create their Contact record and link it to a new or default Organisation. The eCRM password is either created by the new external user or randomly generated by Greentree and emailed to the new user. eModule control settings determine the behaviour.

If you do not have a login, click here to add yourself to our database

Continued on the next page
Note: External Users have limited access to eCRM. A number of settings in Greentree eModule Control, eCRM tab determine what information is exposed to External Users.

Result: You have accessed eCRM. The logged-in user is displayed on each page.

Procedure

How to exit:

1. From any eCRM screen menu bar select the Logout link.

   If the....
   eCRM Logout screen appears

   Then.....
   you have logged out of eCRM

Please note: If any changes are pending, the system will not save before exiting. The user needs to save any changes prior to logging out otherwise changes will be lost.

Result: You have logged out of eCRM.
How to change the eCRM password

Introduction
This section explains how you change the eCRM login password.

Conditions
You need to be logged into eCRM.

Procedure
How to change the password:

From the Main screen:

1. Select the Change Password icon.

2. Enter the old password, press 't to move between fields as required.

3. Enter the new password.

4. Re-enter the new password to confirm.

5. Press the Change Password button.

Result: The user password has been changed.
eCRM Layout

Overview

eCRM consists of a number of Menus: A Main menu and a number of sub-menus. The Menus consist of a number of Icons, each representing an eCRM Function. You can customise the availability of the icons through the Web Menu Configuration feature in Greentree, located in CRM > System > eCRM > Web Menu Configuration. The Web Menu Configuration screen allows you to select the applicable menu, then the menu option (icon) and to turn the visibility of the option on and off. You can also update the Caption of the Icon.

The eCRM menu structure and available icons vary depending on your access level i.e. internal or external eCRM User. The eCRM Menu and Functions topics are split to distinguish between internal and external eCRM access.
Internal User

Main Menu

Introduction
The key functions and buttons are explained in the following diagram.

Main Menu Icons

**Organisations**
Gives access to the Organisations Menu, which hosts the my / team / all Organisations view feature, enables a search on Organisations and allows you to add a new Organisation.

**Contacts**
Gives access to the Contacts Menu, which hosts the my / team / all Contacts view feature, enables a search on Contacts and allows you to add a new Contact.

**Quotes**
Gives access to the Quotes Menu, which hosts the search / add Quotes feature. These items allow you to perform a search on Quotes and create a new Quote.

Continued on the next page
**Add Communication**
Gives access to the Adding New Communication feature, which allows you to create a new communication in Greentree. The Communication can be of a specific nature, such as Service or Sales related.

**Add Follow-up**
Gives access to the Adding New Follow-up feature, which allows you to create a new task in Greentree. The Follow-up can be of a specific nature, such as Service or Sales related.

**Inventory Search**
Gives access to the Inventory Search feature. You can search for an Inventory Item based on Inventory / Supplier / Location detail. The detail of the Inventory item is available through drill-down on the specific Inventory item in the results table.

**Current Date**
Displays the current system date.

**Summary**
The Summary gives access to additional items that can not necessarily be accessed through the menu items in eCRM. eCRM Module Control (eCRM tab) in Greentree allows you to indicate which summary items should be displayed. The available items are:
- Assigned to the eCRM User
  - Today’s Appointments
  - Today’s Follow-ups
  - Future Appointments
  - Future Follow-ups
  - Open Communications
  - Active Leads
  - Active Quotes
- Open Calls / Requests (Including summary display of the Call / SR history. The full history text is displayed via fly-over hint i.e. position the mouse over the History Detail field. The full text is displayed. All Attachments are displayed and you have the ability to view the Attachment.)
- Open Orders
- Un-Assigned
- Calls
- Service Requests

The ‘SHOW’ icon displays a summary line of the records. The record number link on the summary line gives access to the detail of the selected record.

The ‘record count and header’ link gives access to a search screen, which allows you to enter criteria and search for a specific record.

**Note:**
- eCRM Module Control (eCRM tab) in Greentree allows you to turn the record count on or off per summary item and auto loads records when the ‘record count and header’ link is selected. The Auto load displays the records upon entry of the search screen.
- The Summary items only gives access to those records that have the ‘Web Accessible’ option ticked in Greentree.
Common Icons
Below is a list of the most commonly used icons throughout eCRM.

**MAIN MENU**
Main Menu – Allows the user to return directly to the main menu.

**CHANGE PASSWORD**
Change Password – Allows the user to change their login user password.

**LOGOUT**
Log Out – Closes the user’s current eCRM session and opens the Login screen.

**Binoculars**
Binoculars – Select to perform a search on the field.
Organisations Menu

Overview

This menu allows you to view Organisation records based on User / Team / All. The display of Organisations can be filtered based on Organisation Relationship, such as Customer or Supplier, and Status. In addition, this menu allows you to perform a search on Organisations and create a new Organisation in Greentree from eCRM.

Organisation Menu Icons

My Orgs

The list of Organisations that the eCRM User is assigned to is displayed. Status and Organisation Relationship are available as filters. You can gain access to the detail of the Organisation through drill-down on the Organisation in the results table.

Team Orgs

The list of Organisations assigned to the eCRM User’s Team/s is displayed. Status and Organisation Relationship are available as filters. You can gain access to the detail of the Organisation through drill-down on the Organisation in the results table.

All Orgs

The full list of CRM Organisations is listed. Status and Organisation Relationship are available as filters. You can gain access to the detail of the Organisation through drill-down on the Organisation in the results table.

Continued on the next page
**Search Orgs**
Allows the user to perform a search on Organisations, based on one of the following: Code, Name, Email or Phone. Other search criteria are also available, such as Organisation relationship and status. You can gain access to the detail of the Organisation through drill-down from the result table. The list of Organisation can also be downloaded.

**Add Org**
Allows the user to create a new CRM Organisation in Greentree from eCRM.

**Relationship**
Gives you the ability to view Organisations based on Relationship. You can select ‘All’ to view all the Organisations irrespective of Relationship.

**Status**
Gives you the ability to view Organisations based on Status. Status lists all the available Organisation statuses in CRM.

**List of Organisations**
The list contains all the Organisations based on the My / Team / All menu selection and Relationship and Status criteria selected. The Organisation Code link gives access to the Organisation detail sub-menu, displaying the detail of the selected Organisation.
Organisations Detail Sub-Menu

**Overview**

This screen displays the detail of a specific Organisation. You have the ability to view the Organisation detail, including Contacts and linked records. If the Organisation is a Customer, then you can also view the Accounts Receivable balances. In addition, you can maintain or delete the Organisation record.

---

### Sub Menu Icons

![Sub Menu Icons]

### Header detail

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Furniture Galore</td>
</tr>
<tr>
<td>Parent Dir</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>Customer</td>
</tr>
<tr>
<td>Business Phone</td>
<td>07 474 52667</td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>0400 000 000</td>
</tr>
<tr>
<td>Fax Number</td>
<td>07 4974 5266</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:sales@furnituregalore.com.au">sales@furnituregalore.com.au</a></td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>Business Street Address</td>
<td></td>
</tr>
<tr>
<td>Postal Address</td>
<td></td>
</tr>
<tr>
<td>Post code</td>
<td>4200</td>
</tr>
<tr>
<td>Country</td>
<td>VIC</td>
</tr>
<tr>
<td>Time Zone</td>
<td>05:00</td>
</tr>
</tbody>
</table>

### Page tabs

- View Org
- Contacts

**View Org**

Allows the user to view the Organisation detail for the record selected on the Organisation Main Menu.

**Contacts**

Allows the user to view a list of Contacts linked to the displayed Organisation.

---

*Continued on the next page*
Related
Allows the user to view a list of records related to the selected Organisation. Related records give a full summary of all the activity captured for the Organisation, such as Leads, Quotes, Communications and Calls. The Code and Description link fields give access to the detail of the related record.

Change Org
Allows the user to maintain the detail of the displayed Organisation.

Delete Org
Allows the user to delete the Organisation. The Organisation that you wish to delete is displayed and you need to confirm deletion before the record is removed from the database.

Customer Account
Allows the user to view the Customer Organisation’s account detail, Sales history, unpaid Invoices, all Invoices, open Orders, all Orders and Aging information. This feature is only available if the Organisation is of Relationship type ‘Customer’.

Note: eCRM Module control (eCRM tab) in Greentree contains a number of settings that determine the look and feel of the Accounts display.

Supplier Account
Allows the user to view the Supplier Organisation’s account detail: Purchase history, unpaid Invoices, all Invoices, open Orders, all Orders and Aging information. This feature is only available if the Organisation is of Relationship type ‘Supplier’.

Note: eCRM Module control (eCRM tab) in Greentree contains a number of settings that determine the look and feel of the Accounts display.

Add Contact: This button gives access to the ‘Adding New Contact’ screen. You can create a new Contact for the Organisation from eCRM.

Save – Saves the added or changed Organisation.

Delete – Deletes the selected Organisation.

Check for Duplicates – This button is available on the Add Organisation screen. If selected, the system checks the Greentree CRM Organisation database to determine if a possible duplicate Organisation exist. The duplicate check is based on the following Organisation fields: Business Phone, Email Address and Full Name.

Continued on the next page
Header details Displays Organisation Name, Alpha, Code, Parent Organisation, Status and Relationship.

Page tabs Provides a logical breakdown of the various Organisation detail fields. Enables access to the Main, Other Info, Notes, Security and Custom pages for the Organisation.

Pages Contains all the detail fields for the Main, Other Info, Notes, Security and Custom pages
Contacts Menu

Overview
This menu allows you to view Contact records based on User / Team / All. The display of Contacts can be limited based on Status. In addition, this menu allows you to perform a search on Contacts and create a new Contact from eCRM.

Contacts Menu Icons

My Contacts
The list of CRM Contacts that is assigned to the eCRM User is displayed. The list can be filtered based on Status. You can gain access to the detail of the Contact through drill-down on the contact record.

Team Contacts
The list of CRM Contacts that is assigned to the eCRM User Team/s is displayed. The list can be filtered based on Status. You can gain access to the detail of the Contact through drill-down on the contact record.

All Contacts
The full list of CRM Contacts is displayed. The list can be filtered based on Status. You can gain access to the detail of the Contact through drill-down on the contact record.

Continued on the next page
Search Contacts
Allows the user to perform a search on CRM Contacts based on one of the following: Contact Code, Surname, Name, Email or Phone. Additional search criteria are available. You can also download the list of Contacts.

Add Contact
Allows the user to create a new CRM Contact in Greentree from eCRM.

Check for Duplicates – This button is available on the Add Contact screen. If selected, the system checks the Greentree CRM Contacts database to determine if a possible duplicate Contact exists. The duplicate check is based on the following Contact fields: Business Phone, Email Address, Full Name, First letter of Full Name appended to Surname.

Status
Gives you the ability to view Contacts based on Status. Status lists all the available Contact statuses in CRM.

List of Contacts: The list contains all the Contacts based on the My / Team / All menu selection and Status criteria selected. The Contact Code link gives access to the Contact detail sub-menu, displaying the detail of the selected Contact.
Contacts Detail Sub-Menu

Overview
This screen displays the detail of a specific Contact. You have the ability to view the Contact detail, including linked records. In addition, you can maintain or delete the Contact record.

Sub Menu Icons

View Contact
Allows the user to view a list of Contacts linked to the selected Organisation.

Related
Allows the user to view a list of records related to the selected Contact. Related records give a full summary of all the activity captured for the Contact, such as Leads, Quotes, Communications and Calls. The Code and Description link fields give access to the detail of the related record.

Continued on the next page
**Change Contact**  
Allows you to maintain details for the existing Contact. If turned on in Greentree, eModule Control, this option also allows you to move a Contact to another Organisation.

**Delete Contact**  
Allows you to delete the CRM Contact.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Communication</td>
<td>Allows you to add a communication for the selected Contact.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves the added or changed Contact.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the selected Contact.</td>
</tr>
<tr>
<td>Move Contact</td>
<td>Allows you to move a Contact from one Organisation to another. This button is located on the ‘Change Contact’ screen. This option is only available if turned on in Greentree eModule control.</td>
</tr>
</tbody>
</table>

**Header details** Displays Contact Full Name, Surname, Code, Organisation, Status and Relationship.

**Page tabs** Provides a logical breakdown of the various Contact detail fields. Enables access to the Main, Other Info, Notes, Security and Custom pages for the Contact.

**Pages** Contains all the detail fields for the Main, Other Info, Notes, Security and Custom pages.
Quotes Menu

Overview
This menu allows you to perform a search on Quotes in order to view the detail of a specific Quote. You can also create a new Quote from eCRM.

Quotes Menu Icons

Search Quotes – Perform a search on CRM Quotes based on one of the following fields:
- Summary
- Number
- Detail

The view field gives access to the User / Team / All View based on security settings in Greentree. Select the Quote Number in order to drill-down on a Quote to view the detail. The Quote Sub-menu is displayed which gives you the ability to view or change the Quote.

Add Quote – This menu item allows you to create a new Quote from within eCRM.
**Quotes Detail Sub-Menu**

**Overview**
This screen displays the detail of a specific Quote. You have the ability to view all the detail of the Quote, including Line Items and delivery detail. In addition, you can maintain quote detail and add or delete line items.

**Sub Menu Icons**

**Page tabs**

**Header details**

**Page details**

---

**Sub Menu Icons**

**View Quote** – This option is displayed by default when you drill-down on a Quote from the Quote Menu. The View Quote displays the detail of the selected Quote. Sub-tabs are displayed, giving access to the multiple Quote fields. The Quote line items are listed in a table at the bottom of the page.

**Change Quote** – The displayed quote can be updated. All fields in black colour can be changed. You can also select a Line Number in order to maintain the Quote Line detail.

**Add Line** – This menu item gives access to the Add New Line item feature. You need to select the stock item that you want to add to the quote and enter the applicable detail.

**Delete Line** – This menu item allows you to select the Quote Lines that you wish to delete. If all Quote lines are deleted, you have the option to delete the Quote.

---

*Continued on the next page*
Header details  Displays Quote Number and Summary.

Page tabs  Provides a logical breakdown of the various Quote detail fields. Enables access to the Main, Delivery, Custom and Notes pages for the Quote.

Pages  Contains all the detail fields for the Main, Delivery, Custom and Notes pages.

SEARCH NOW   Enables a search on the CRM Sales Quotes database.

Save   Commits changes to CRM Sales Quotes to the Greentree database. Changes include adding a new Line item and changing Quote detail.

Delete Quote   Permanently removes the Quote from the Greentree database.

Delete line Items   Permanently removes selected Quote Line items from the Greentree database.
External User

Main Menu

Introduction

The key functions and buttons are explained in the following diagram.

Main Menu Icons  Page tabs  Header Details  Pages

View Org

The detail of the eCRM User's Organisation is displayed. If the Organisation is not of Type 'Customer', then the Organisation detail is displayed on login.

Contacts

The list of Contacts for the eCRM User's Organisation is displayed. You can drill-down on a Contact to view the detail and to access the Contacts Sub Menu.

Related

Allows the user to view a list of records related to the eCRM User’s Organisation. Related records give a full summary of all the activity captured for the Organisation, such as Leads, Quotes, Communications and Calls. The Code and Description link fields give access to the detail of the related record.

Continued on the next page
**Change Org**
Allows the user to maintain the detail of their Organisation.

**Account**
Allows the user to view the Customer Organisation account detail, Sales history, unpaid Invoices, all Invoices, open Orders, all Orders and Aging information. This feature is only available and displayed upon login if the Organisation is of Relationship type ‘Customer’.

**Note:** eCRM Module control (eCRM tab) in Greentree contains a number of settings that determine the look and feel of the Accounts display.

**Common Icons** Below is a list of the most commonly used icons throughout eCRM.

- **Main Menu**
  - Main Menu – Allows the user to return directly to the main menu.

- **Change Password**
  - Change Password – Allows the user to change their login user password.

- **Log Out**
  - Log Out – Closes the user’s current eCRM session and opens the Login screen.

- **Binoculars**
  - Binoculars – Select to perform a search on the field.

**Header details** Displays Organisation Name.

**Page tabs**
Provides a logical breakdown of the various Organisation detail fields. Enables access to the Main, Other Info, Notes, Security and Custom pages for the Organisation.

**Pages**
Contains all the detail fields for the Main, Other Info, Notes, Security and Custom pages.
Contacts Sub-Menu

Overview

The Contacts sub-menu is accessed through drill-down on a Contact. It gives access to the detail of the selected Contacts and allows you to change the Contact record and / or view related records for the Contact.

Contacts Sub-Menu Icons

View Contact
Displays the detail of the selected Contact.

Related
Allows the user to view a list of records related to the selected Contact. Related records give a full summary of all the activity captured for the Contact, such as Leads, Quotes, Communications and Calls. The Code and Description link fields give access to the detail of the related record.

Change Contact
Allows you to maintain details for the existing Contact.
**Fields**

**Organisation Fields**

The **Name**, **Alpha** and **Code** fields allow the entry of the actual name of the Organisation, a summary alpha code and the code, which is assigned by the system for the Organisation.

The **Parent** Organisation field is used to link the Organisation to a parent Organisation. This will be necessary where an Organisation may have a number of branches, but need to be linked to the main branch.

The **Status** field enables the Organisation to be distinguished between active, inactive, ready for deletion or temporary Organisations, thereby limiting the number of records retrieved during searches.

The **Relationship** field is used to specify the relationship of the Organisation to your business as internal, reseller, prospect or other.

The main screen fields enable the user to record **Phone**, **Fax**, **Email**, **Addresses** and Accounts Receivable **Contact** information for the Organisation and capture details for internal use such as the **Reseller**, **Territory**, **Sales Person**, **Sales Team**, **Sales Manager**, to **exclude from Mailing Lists** and **exclude from Call Rosters**.

The other info screen fields enable the user to enter general **Alerts** to be displayed every time this Organisation is selected and indicate the **Importance**, **Source**, **Classification** and how long they have been a **Customer**.

Business fields enable the user to define different levels of categorisation being **Industry**, **SIC code** and Organisation **Type**, which defines precisely where the Organisation fits into the Business Sector. General **size** and **revenue** detail can be recorded.

Credit information fields enable the user to define the **payment method**, view and maintain the **stop credit** indicator and display **credit alert** text to inform employees of specific credit details for the selected Organisation.

**Reference check** fields enable the user to indicate whether the Organisation can be used as a reference. You can record the Contact person and relevant notes.

**Service & Support PO** required checkbox enables the user to indicate that a purchase order is required when a Call or Service Request is created for the Organisation.

The **notes** page allows the user to enter unlimited lines of free form text as required. The text typed into the field appears in the Organisation notes tab within Greentree.

The security page enables the user to assign a **User** and **Team** (defaults to logged-in user and team) for the Organisation and default settings, such as **eServices Login password**, default user, team and **Job** for Service Requests and Calls.

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*Continued on the next page*
The custom page makes use of the standard Greentree Financials Custom facility. The Custom facility includes working with **Trees** and **Fields**, defined for your company. Trees serve as a means to categorise items within your system. Fields give you the option to add user-defined fields to forms, thereby customising the item to suit your specific requirements.

### Contact Fields

The **Full Name**, **Surname** and **Code** fields allow the entry of the following:
- **Contact’s Full Name** (Name and Surname), which enables search based on First Name
- **Surname**, which enables search based on Surname
- **Code**, which uniquely identifies the Contact. The code for a new Contact is assigned by the system.

The **Organisation** field is used to link the Contact to a specific Organisation.

The **Status** field enables the Contact to be distinguished between active, inactive, ready for deletion or temporary Contacts, thereby limiting the number of records retrieved during searches.

The **Relationship** field is used to specify the relationship of the Contact to your business as a customer or other. Only entry of ‘Other’ is allowed through eCRM.

The main page enables the user to record the Contact’s **Position**, indicate if the Contact is the **primary Contact** for the Organisation, indicate if the Contact should be **excluded from Mailing Lists** and select the person that the Contact **reports to** within the Organisation. The Reports To Contact is selected through a search field, giving access to all existing CRM Contacts. You can also record the Contact’s **Phone**, **Fax**, **Mobile**, **Pager**, **Email** and **Business Street** and **Postal Addresses**.

The other info page enables you to record the Contact’s **Personal Street** and **Postal Addresses** and to capture other Internal information, being **Title**, **Gender**, **Date of Birth**, **Occupation** and **Interests**. You can also select the **Salutation** for the Contact. The Salutation can be used when emails and letters are generated through CRM.

The **notes** page allows you to enter unlimited lines of free form text as required. The text typed into the field appears in the Contact notes tab within Greentree.

The security page enables you to assign a **user** and **team** (defaults to logged in user and team) for the Contact and to enter the **eServices Login password**.

The custom page makes use of the standard Greentree Financials Custom facility. The Custom facility includes working with **Trees** and **Fields**, defined for your company. Trees serve as a means to categorise items within your system and fields give you the option to add **user defined fields** to forms, thereby customising the item to suit your specific requirements.
Quote Fields

**Number**
Quote Number is the unique Quote Identifier. This value is system generated. Quote Number can be used to perform a search Quotes.

**Summary**
Short description of Quote. Summary can be used to perform a search Quotes.

**Organisation**
The Organisation that the Quote is for. Organisation is a required field.

**Contact**
The Contact person at the Organisation who the Quote is for or is negotiated with.

**Campaign**
The Campaign that resulted in the Quote. This field is optional.

**Activity**
The Campaign Activity that resulted in the Quote. This field is optional.

**Sales person**
The Sales person involved in the Sales process. Sales Person is a required field. Sales Person on a new quote defaults based on the following:
- Greentree > User Preferences > CRM button > Sales tab.
- If the User is not linked to a Sales person then the Sales person defaults from the Organisation.
You can maintain Sales Person as required through selecting another Sales person through the use of the search field.

**Quote Stage**
Quote Stage represents the level of maturity of the Quote i.e. is it at beginning or final phase.
Quote Stage defaults from Greentree > CRM > System > Module Control > Sales tab.

**Branch**
Branch defaults from Greentree > User Preferences > CRM button > Sales tab. You can select another Branch, if required.

**Type**
Only Sales Type Quotes can be accessed / created from eCRM.

**Price Book**
The Quote Header Price Book defaults as follows:
- If the Quote is generated from a Campaign, then the Price Book defaults to the Price Book set against the Campaign.
- If the selected Organisation is of Type Customer, then the Price Book defaults to the Price Book for the Accounts Receivable Customer.
- If the selected Organisation is not of Type Customer, then the Price Book defaults to the Price Book set in Inventory Module control.
- If Inventory Module is not turned on or no Price Book has been set at Inventory level, then Price Book on the Quote is blank.
You have the ability to manually select another Price Book for the Quote. The Price Book of the Line items on the Quote defaults to the Price Book on the Quote Header.

**Quote Discount**
This field displays the Total Discount for the record. This field is calculated based on the Discount per Line item included. This field cannot be modified.
**Quote Net**
This field displays the Total Net Income for the record. This field is calculated based on:
- If Tax Type of Line Item = Inclusive of Tax: (Price + Tax) - Discount, for all the Line items included on the record.
- If Tax Type of Line Item = Exclusive of Tax: Price - Discount, for all the Line items included on the record.
This field cannot be modified.

**Quote Sale Total**
This field displays the Total Amount for the record. This field is calculated based on the Line Total for each item, including Tax. This field cannot be modified.

**Quote Sale Margin**
This field displays the Total Profit Margin for the record. This field is calculated based on the Profit Margin for each Line item. This field cannot be modified.

**Quote Line Table**
This table displays detail for each Quote Line Item. Lines can be added, edited, deleted or viewed. Inventory Kitsets will be displayed as either a Kitset or exploded into the Inventory Items it consists of. The 'Explode Kitsets on Quote' setting in CRM, Module Control determines this behaviour.

**Delivery Address No**
The Delivery Address number of the Delivery Address to be used for the Quote.

**Delivery Address Name**
This Name of the Delivery Address to be used on the Quote. This field is display only.

**Delivery Address**
This field contains the Delivery Address for the Delivery Address No selected. This field is display only.

**Delivery Address Suburb**
This field contains the Suburb of the Delivery Address selected. Another Suburb can be selected if required.

**Delivery Address Post Code**
This field contains the Delivery Address Post Code for the Delivery Address No selected. Another Post Code can be selected if required.

**Delivery Address State**
This field contains the Delivery Address State for the Delivery Address No selected. Another State can be selected if required.

**Delivery Address Country**
This field contains the Delivery Address Country for the Delivery Address No selected. Another country can be selected if required.

**Delivery Address Time Zone**
This field contains the Delivery Address Time Zone for the Delivery Address No selected. Another Time Zone can be selected if required.

**Delivery Address Phone**
This field displays the Contact Phone Number based on the Delivery Address No selected.

**Delivery Address Mobile**
This field displays the Contact Mobile Number based on the Delivery Address No selected.

**Delivery Address Fax**
This field displays the Contact Fax Number based on the Delivery Address No selected.

**Delivery Address Contact**
This field displays the Contact based on the Delivery Address No selected.

Continued on the next page
Delivery Address Email
This field displays the Email Address to be used when contacting the Delivery Site.

Delivery Address Web
This field displays the Web Address for the Delivery Site.

Delivery Address Additional Information
This field defaults to the ‘Instructions’ as entered against the Delivery Address No selected in Greentree > AR Customer Maintenance. You can maintain the additional Delivery Detail as required.

Trees
A tree is a hierarchy of classifications that represents meaningful groups of items that your company deals with. This field lists the Quote Trees available to CRM Quotes. You can select and maintain the Tree Branches as required.

Fields
Custom fields give the Greentree User the ability to define additional fields you require for a specific CRM item. The defined Quote custom fields appear in this field. You can enter and maintain the values of custom fields as required.

Notes
Notes are a text-based description of the Quote and any other detail pertinent to the Quote. Select Enter to create a new line.
eCRM Functions

Overview

Introduction Internal and external eCRM users have access to a number of features in eCRM. This section explains how to use the various features available in eCRM. Note: The list of features is split up to clearly show which features are available to internal / external eCRM users.

In this section The following eCRM Functions are available:

- **Internal eCRM User**
  - **Organisation Functions**
    - Add new Organisation
    - Update Organisation detail
    - Delete Organisation
    - Create new Contact for Organisation
    - View list of Contacts for Organisation
    - View related records for Organisation
    - View Account detail if the Organisation is of Type ‘Customer’
      - View Unpaid Invoices
      - View All Invoices
      - View Open Orders
      - View All Orders
    - Search Organisations
    - Download Organisations
    - View Summary page listing related records for eCRM User’s Organisation
      - View Today’s Appointments
      - View Today’s Follow-ups
      - View Future Appointments
      - View Active Follow-ups
      - View Open communications
      - View Active Leads
      - View Active Quotes
      - View Open Support Calls / Service Requests
      - View Open Orders
      - View Unassigned Records
        - Assign to yourself
    - View Organisations – My / Team / All
  - **Contact Functions**
    - View Contacts – My / Team / All
    - Add new Contact
    - Update Contact detail
    - Move Contact
    - Delete Contact
    - Add Communication
    - Add Follow-up
    - View related records for Contact

Continued on the next page
- Search Contacts
- Download Contacts

- Quote Functions
  - Search Quotes
  - View quotes
  - Change Quotes
  - Add new Quote
  - Change Quote Line
  - Add Quote Line
  - Delete Quote Line
  - Delete Quote

- Add Communication
- Add Follow-up
- Search Inventory

- External eCRM User

  - View eCRM User's Organisation
  - View list of Contacts for eCRM User’s Organisation
  - View related records for Contact
  - Update Contact detail
  - Create new Contact
  - View related records for eCRM User’s Organisation
  - Update Organisation detail for eCRM User's Organisation
  - View account detail if the eCRM User’s Organisation is of Type ‘Customer’
    - View Unpaid Invoices
    - View All Invoices
    - View Open Orders
    - View All Orders
Internal User - Organisation Functions

New

Introduction
This section explains how a user creates a new Organisation.

Conditions
None

Procedure
From the Main screen:

1. Select the Organisations icon.
2. Select the Add Orgs icon, an adding a new Organisation screen will appear.

3. Enter the relevant name and alpha code, press tab to move between fields as required. The code is system generated on saving the Organisation.

4. Enter the parent Organisation required for the Organisation or select the binoculars link to search Organisations using the name, alpha, code, view, relationship and status as your selection criteria.

5. Enter the relevant status, accept the default or select from the drop down list the Organisation status.

Continued on the next page
6. Enter the relevant relationship, accept the default or select from the drop down list the Organisation relationship.

7. Enter the relevant main information (as required);

- Type in the business phone, mobile phone, fax number, email address, AR Contact and web address.
- Use the binoculars link to search and select the reseller. All Active Reseller Organisations are listed.
- Select from the drop down list the territory.
- Use the binoculars link to search and select the sales person.
- Select from the drop down list the sales team.
- Select from the drop down list the sales manager.
- Tick the exclude from mailing lists to exclude.
- Tick the exclude from call rosters to exclude.
- Enter the business street address, post code, state, country and time zone.
- Enter the business postal address or tick the same as street address if the same address is applicable.

8. Select the Other Info page link.

9. Enter the relevant other information (as required);

- Enter the alert text and customer since date.
- Select from the drop down list the importance.
- Select from the drop down list the source.
- Select from the drop down list the classification.
- Select from the drop down list the industry.
- Select from the drop down list the Organisation type.
- Use the binoculars link to search and select the SIC code.
- Enter the revenue and number of employees.
- Tick the stop credit checkbox to flag as credit stopped.
- Enter the payment method and alert text.
- Tick the available checkbox to flag a reference check is available.
- Enter notes text.
- Tick the PO Required checkbox if required for service and support.

10. Select the Notes page link.

11. Enter notes text (as required).

12. Select the Security page link.

Continued on the next page
13. Enter the relevant security details (as required);
   - Accept the default or select from the drop down list the assigned user.
   - Accept the default or select from the drop down list the assigned team.
   - Select from the drop down list the default team for service requests.
   - Select from the drop down list the default team for calls.
   - Use the binoculars link to search and select the default job for service requests.
   - Use the binoculars link to search and select the default job for calls.
   - Select from the drop down list the default debt collection call user.
   - Select from the drop down list the default debt collection call team.
   - Enter the password.
   - Enter the password to reconfirm.

14. Select the Custom page link and enter details (as required).

15. Press the Save button.

**Result:** A new Organisation has been created. Note: If the possibility exist that a duplicate Organisation has been created, then a warning message is displayed. You can confirm that the new Organisation should be created in Greentree or cancel the update. The duplicate check is based on the following Organisation fields:
   - Email Address
   - Business Phone
   - Name
Change

Introduction
This section explains how to change an Organisation.

Conditions
The eCRM User’s Greentree User Privileges determine if the user can change an Organisation.

The code of an existing Organisation cannot be changed from within the Organisation change screen. If these details are incorrect the Organisation needs to be deleted and a new Organisation created with the correct information. For information on how to delete an Organisation refer to the Organisation, Delete page within this manual.

Procedure
How to change an Organisation.

From the Main screen:

1. Select the Organisations icon.
2. Select the My, Team or All Orgs icon.
3. Select the Org Code link to open the Organisation to be changed.
4. Select the Change Org icon.
5. Change the Organisation details as required. Note: Several tabs are available which hosts additional fields that you may wish to complete.
6. Press the Save button.

Result: Changes have been made to the Organisation.
Delete

**Introduction**
This section explains how to delete an Organisation.

**Conditions**
The eCRM User’s Greentree User Privileges determine if the user can delete an Organisation.

When an Organisation is deleted all page details within the selected Organisation are deleted. Organisations linked to AR customers and related records cannot be deleted.

**Procedure**
How to delete an Organisation.

From the Main screen:

1. Select the Organisations icon.
2. Select the My, Team or All Orgs icon.
3. Select the Org Code link to open the Organisation to be deleted.
4. Select the Delete Org icon.
5. Press the Delete button and OK to confirm delete.

**Result:** The Organisation and all pages within the selected Organisation have been deleted.
Add Contact

Introduction
This section explains how a user creates a new Contact for the selected Organisation.

Conditions
None

Procedure
How to create a new Organisation Contact.

From the Main screen:

1. Select the Organisations icon.
2. Select the My, Team or All Orgs icon.
3. Select the Org Code link to open the Organisation to add the Contact to.
4. Press the Add Contact button.
5. Enter the Contact details as required (refer to the Contact, New page within this manual for further details). Note: Several tabs are available which hosts additional fields that you may wish to complete.
6. Press the Save button.

Result: A new Contact for the selected Organisation has been created.
View Contacts

**Introduction**
This section explains how to view Contacts related to Organisations.

**Conditions**
None.

**Procedure**
How to view Contacts.

From the Main screen:

1. Select the Organisations icon.
2. Select the My, Team or All Orgs icon.
3. Select the Org Code link to open the Organisation to view the Contacts for.
4. Select the Contacts icon.

**Result:** The Contacts for the selected Organisation are listed.

5. Select the Contact Code link to view additional details for the selected Contact as required.

**Please note:** Contacts can be filtered by status and sorted by Contact Code, Contact Surname and Contact Name.
# Related Records

<table>
<thead>
<tr>
<th><strong>Introduction</strong></th>
<th>This section explains how to view records related to Organisations.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Conditions</strong></td>
<td>None</td>
</tr>
<tr>
<td><strong>Procedure</strong></td>
<td>How to view related records.</td>
</tr>
<tr>
<td></td>
<td>From the Main screen:</td>
</tr>
<tr>
<td></td>
<td>1. Select the Organisations icon.</td>
</tr>
<tr>
<td></td>
<td>2. Select the My, Team or All Orgs icon.</td>
</tr>
<tr>
<td></td>
<td>3. Select the <strong>Org Code</strong> link to open the Organisation to view the related records for.</td>
</tr>
<tr>
<td></td>
<td>4. Select the Related icon.</td>
</tr>
<tr>
<td><strong>Result:</strong></td>
<td>The records related to the selected Organisation are listed.</td>
</tr>
<tr>
<td></td>
<td>5. Move the mouse over the <strong>Code</strong> or <strong>Description</strong> link to view summary information relevant to the record type as required.</td>
</tr>
<tr>
<td></td>
<td>6. Select the <strong>Code</strong> or <strong>Description</strong> link to view additional details for the selected related record as required and the OK button to close once viewed.</td>
</tr>
<tr>
<td><strong>Please note:</strong></td>
<td>Related records can be sorted by Date/Time, Code and Description.</td>
</tr>
</tbody>
</table>
**Account**

**Introduction**  
This section explains how to view account details related to a customer Organisation.

**Conditions**  
The account is only available if the following is setup:
- Greentree, User Preferences, CRM, Integration tab as ‘Allow customer enquiry from CRM’
- Greentree, User Preferences, Privileges tab, access to Accounts Receivable.
- The selected Organisation is of Relationship Type ‘Customer’.

**Procedure**  
How to view account details.

From the Main screen:

1. Select the Organisations icon.
2. Select the My, Team or All Orgs icon.
3. Select the Org Code link to open the Organisation to view the account details for.
4. Select the Account icon, an account enquiry screen will appear.

![Account Enquiry Screen](image)

*Continued on the next page*
5. Select the Show Unpaid Invoices, Show All Invoices, Show Open Orders and Show All Orders buttons as required to view records.

6. Select the Document Date link to view the details for the record as required. Note: An ‘Is Linked’ column is displayed on the Sales Order detail screen. The ‘Is Linked’ column gives access to the Purchase Orders (if any exist) that the Sales Order is linked to.

7. Select the Line No link to view the details for the line item as required and the OK button to close once viewed.

8. Select the Show Aging button to view account aging information as required.

<table>
<thead>
<tr>
<th>CUSTOMER AGING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aging based on</td>
</tr>
<tr>
<td>Aging from</td>
</tr>
<tr>
<td>Aging periods</td>
</tr>
<tr>
<td>Currency conversion</td>
</tr>
<tr>
<td>Currency display</td>
</tr>
<tr>
<td>Number of Forward Aging Brackets</td>
</tr>
<tr>
<td>Number of Backward Aging Brackets</td>
</tr>
<tr>
<td>Aging Interval</td>
</tr>
<tr>
<td>Show Holds</td>
</tr>
<tr>
<td>Refresh</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>November 2006 onwards</th>
<th>0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 2005</td>
<td>0.00</td>
</tr>
<tr>
<td>September 2006</td>
<td>0.00</td>
</tr>
<tr>
<td>August 2006</td>
<td>0.00</td>
</tr>
<tr>
<td>July 2005</td>
<td>200.00</td>
</tr>
<tr>
<td>June 2006</td>
<td>0.00</td>
</tr>
<tr>
<td>May 2005</td>
<td>0.00</td>
</tr>
<tr>
<td>April 2006</td>
<td>0.00</td>
</tr>
<tr>
<td>March 2006</td>
<td>0.00</td>
</tr>
<tr>
<td>February 2006 and before</td>
<td>1,707.20</td>
</tr>
<tr>
<td>Holds</td>
<td>0.00</td>
</tr>
<tr>
<td>Unapplied</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Outstanding</td>
<td>1,907.20</td>
</tr>
</tbody>
</table>

Continued on the next page
**Result:** The account details for the selected customer Organisation have been viewed.

**Please note:** Invoice and order detail can be sorted by Document Date and Reference. Aging defaults and balance labels are setup within the Greentree, CRM, System, eCRM, Module Control.
Supplier Account

Introduction
This section explains how to view account details related to a supplier Organisation.

Conditions
You must be setup in:
- Greentree, User Preferences, CRM, Integration tab as ‘Allow supplier enquiry from CRM’
- Greentree, User Preferences, Privileges tab, access to Accounts Payable.
- The selected Organisation needs to be of Relationship Type ‘Supplier’.

Procedure
How to view account details.

From the Main screen:
1. Select the Organisations icon.
2. Select the My, Team or All Orgs icon.
3. Select the Org Code link to open the Organisation to view the supplier account details for.
4. Select the Supplier Account icon, an account enquiry screen will appear.

Continued on the next page
5. Select the Show Unpaid Invoices, Show All Invoices, Show Open Orders and Show All Orders buttons as required to view records.

6. Select the **Document Date** link to view the details for the record as required. Note: An ‘Is Linked’ column is displayed on the Purchase Order detail screen. The ‘Is Linked’ column gives access to the Sales Orders (if any exist) that the Purchase Order is linked to.

7. Select the **Line No** link to view the details for the line item as required and the **OK** button to close once viewed.

**Result:** The supplier account details for the selected supplier Organisation have been viewed.

**Please note:** Invoice and order details can be sorted by Document Date and Reference.
Search

Introduction  This section explains how to run an Organisation search.

Conditions  None

Procedure  How to run an Organisation search.

From the Main screen:

1. Select the Organisations icon.
2. Select the Search Orgs icon.

3. Enter the search text into the ‘Search’ field, press tab to move between fields as required.
4. Select the code, alpha, name, email or phone from the drop down list to search by.
5. Select the additional search criteria from the drop-down list:
   - Starts With: The search text is matched against the first number of characters of the Search By field.
   - Equal To: The search text is matched against the full Search By field to determine if a direct match exists.
   - Contains: The search text is matched against any portion of the Search By field to determine if the search text appears anywhere within the Search By field.
6. Select from the drop down list the all, mine or team view to filter the search by or accept the default.
7. Select from the drop down list the relationship to filter the search by or accept the default.
8. Select from the drop down list the status to filter the search by or accept the default.
9. Press the ‘Search Now’ button to run the search. The first 20 records that match the search criteria will be displayed.
10. Select the Org Code link to view and edit details for the Organisation.

Continued on the next page
Result: An Organisation search has been run.

Note: Advanced search options are available through the Advanced Options link. This feature allows you to base the Organisation Search on an Organisation Tree and/or Tree Branch.
- Tick the advanced search option you wish to use.
- Select Save on the Advanced Search Options screen.
- If you included Organisation Trees in the search, then the Tree criteria is available for you to select once the ‘Search Now’ button has been selected. Select the Tree/Branch that you wish to filter the Organisations on.

Result: The Organisation list is filtered to display only the Organisations that meet the search criteria and the Tree/Branch criteria selected.
Download Organisation List

**Introduction**
This section explains how to download a list of Organisations.

**Conditions**
Greentree > User Preferences > CRM button > eCRM tab, Allows download of lists determine if this feature is available to the eCRM user.

**Procedure**
How to download a list of Organisations.

From the Main screen:

1. Select the Organisations icon.
2. Select the Search Orgs icon.
3. Select the ‘Download List’ link.
4. Enter the directory to which the Organisation download .csv file should be saved.

**Result:** A .csv (comma delimited) file containing all the CRM Organisations are created.
View Summary page

**Introduction**
This section explains how a user can access the Summary page, listing related records and giving access to the detail of the related records for the eCRM User. The following related records can be accessed through the Summary page:
- View Today’s Appointments
- View Today’s Follow-ups
- View Future Appointments
- View Active Follow-ups
- View Open communications
- View Active Leads
- View Active Quotes
- View Open Support Calls / Service Requests
- View Open Orders
- Unassigned Records
  - Assign record to yourself

**Conditions**
Greentree eModule Control > eCRM > Home Page Display options, determine which related records are displayed on the Summary page.

**Procedure**
How to access the eCRM Summary page.

1. The Summary page is displayed upon login on Internal User level.

2. To access the summary page once within eCRM, select the Main Menu icon.

*Continued on the next page*
Result: The eCRM Summary page is displayed.

3. Select the Show icon to view any of the related records displayed on the summary page.

4. If you wish to assign an unassigned record to yourself:
   - Drill-down on the Unassigned topic on the Summary screen through the use of the SHOW icon.
   - Drill-down on the specific record you wish to assign to yourself.
   - Assign the record to yourself through the use of the Assign to Myself button.
View Organisations

**Introduction**
This section explains how a user can view the list of Organisations that the eCRM User is assigned to, or the eCRM User’s Teams are assigned to, or view the full list of CRM Organisations.

**Conditions**
The eCRM User’s Greentree User Privileges determine if All / Team Organisations can be viewed.

**Procedure**
How to view the list of CRM Organisations.

From the Main Menu:

1. Select the Organisations icon
2. The list of all CRM Organisations is displayed.

3. To view only the Organisations assigned to the eCRM User, select the My Orgs icon.

4. To view the list of Organisations assigned to the eCRM User’s Teams, select the Team Orgs icon.

5. To access the full list of CRM Organisations again, select the All Orgs icon.

Continued on the next page
6. The view screens contain additional criteria which you can use to filter the Organisations displayed. Organisation Relationship and Status is available as criteria fields. Select the Relationship / Status you wish to base your search on.

**Result:** The list of CRM Organisations that meet the criteria entered is displayed.
Internal User - Contact Functions

View Contacts

Introduction
This section explains how a user can view the list of Contacts that the eCRM User is assigned to, or the eCRM User's Teams are assigned to, or view the full list of CRM Contacts.

Conditions
The eCRM User’s Greentree User Privileges determine if All / Team Contacts can be viewed.

Procedure
How to view the list of CRM Contacts.

From the Main Menu:

1. Select the Contacts icon

2. The list of all My Contacts is displayed, listing all CRM Contacts assigned to the eCRM user.

   3. To view the list of Contacts assigned to the eCRM User’s Teams, select the Team Contacts icon.

   4. To access the full list of CRM Contacts, select the All Contacts icon.

   5. To view only the Contacts assigned to the eCRM User again, select the My Contacts icon.

   6. Status is available as a criteria field. Select the Status you wish to base your search on.

Result: The list of CRM Contacts that meet the criteria entered is displayed.
New

Introduction  This section explains how a user creates a new Contact.

Conditions  None

Procedure  How to create a new Contact.

From the Main screen:

1. Select the Contacts icon.

2. Select the Add Contacts icon, an adding a new Contact screen will appear.

3. Enter the relevant full name and Surname, press tab to move between fields as required. The code is system generated on saving the Contact.

Continued on the next page
4. Enter the Organisation required for the Contact or select the binoculars link to search Organisations using the name, alpha, code, view, relationship and status as your selection criteria.

5. Enter the relevant status, accept the default or select from the drop down list the Contact status.

6. Enter the relevant main information (as required);
   - Type in the position, business phone, mobile phone, email address, fax number, pager and home phone.
   - Use the binoculars link to search and select the reports to Contact.
   - Tick the is primary Contact to make primary Contact for Organisation.
   - Tick the exclude from mailing lists to exclude.
   - Select from the drop down list the territory.
   - Enter the business street address, post code, state, country and time zone or tick the from Organisation if the same address as the Organisation is applicable.
   - Enter the business postal address or tick the from Organisation if the same as the street address if the same as the business street address is applicable.

7. Select the Other Info page link.

8. Enter the relevant other information (as required);
   - Enter the personal street address, post code, state, country and time zone.
   - Enter the personal postal address or tick the same as street address if the same as the personal street address is applicable.
   - Select from the drop down list the title.
   - Select from the radio dials the gender.
   - Select from the radio dials the salutation as formal, casual or other.
   - Enter the interests.
   - Enter the date of birth.
   - Select from the drop down list the occupation.

9. Select the Notes page link.

10. Enter notes text (as required).

Continued on the next page
11. Select the Security page link.

12. Enter the relevant security details (as required);
   - Accept the default or select from the drop down list the assigned user.
   - Accept the default or select from the drop down list the assigned team.
   - Enter the password.
   - Enter the password to reconfirm.

13. Select the Custom page link and enter details (as required).

14. Press the Save button.

**Result:** A new Contact has been created.
Change

Introduction
This section explains how to change a Contact.

Conditions
The code of an existing Contact cannot be changed from within the Contact change screen. If these details are incorrect the Contact needs to be deleted and a new Contact created with the correct information. For information on how to delete a Contact refer to the Contact, Delete page within this manual.

The eCRM User’s Greentree User Privileges determine if the user can change a Contact.

Procedure
How to change a Contact.

From the Main screen:

1. Select the Contacts icon.
2. Select the My, Team or All Contacts icon.
3. Select the Contact Code link to open the Contact to be changed.
4. Select the Change Contact icon.
5. Change the Contact details as required.
6. Press the Save button.

Result: Changes have been made to the Contact.
Move Contact

Introduction
This section explains how to move a Contact to another Organisation.

Conditions
The Move Contact button is available if turned on in Greentree eModule Control, eCRM tab. The Move Contact button is located on the Change Contact screen.

Procedure
How to move a Contact.

From the Main screen:

1. Select the Contacts icon.
2. Select the My, Team or All Contacts icon.
3. Select the Contact Code link to open the Contact to be changed.
4. Select the Change Contact icon.
5. Select the Move Contact button.
6. Select the Organisation that you wish to move the Contact to through any one of the following fields: Org Name, Org Alpha, Org Code.
7. Select one of the following options:

☐ Remove Contact from current Organisation - The following updates are performed in Greentree:
   o The Contact field is updated to <blank> for each record that the Contact is related to, except for Bookings.
   o The Booking line is updated to reflect the new Organisation that the Contact has moved to.
   o If the Booking has been quoted, then the Contact is updated to <blank> on the Quote. The Quote remains against the original Organisation. The Notes field on the Quote is updated, stating that the Quote was linked to ‘Contact’ who was deleted on ‘date’.
   o If the Booking has been invoiced, then the Invoice remains unchanged (irrespective of the Invoice being addressed to the CRM Contact’s AR Customer or the old CRM Organisation’s AR Customer).

Continued on the next page
A link is auto created between the Contact and all records that the Contact was previously related to. Another link is created between the Contact and the Organisation it was previously assigned to. The Contact’s Note field is updated with text to indicate that the Contact was moved on ‘date’ to ‘new Organisation’.

- Leave Contact as inactive on current Organisation - The following updates are performed in Greentree:
  - The Contact’s status is updated to ‘Inactive’ for the current Organisation.
  - A new contact is created for the new Organisation. All detail for the contact is automatically filled, based on the original Contact.
  - A link is auto created between the old and new Contact. All related items for the old Contact remains unchanged.

8. Press the Move Contact button.

**Result:** The Contact has been moved to the new Organisation.
Delete

**Introduction**
This section explains how to delete a Contact.

**Conditions**
The eCRM User’s Greentree User Privileges determine if the user can delete a Contact.

When a Contact is deleted all page details within the selected Contact are deleted. Contacts linked to related records cannot be deleted.

**Procedure**
How to delete a Contact.

From the Main screen:

1. Select the Contacts icon.
2. Select the My, Team or All Contacts icon.
3. Select the Contact Code link to open the Organisation to be deleted.
4. Select the Delete Contact icon.
5. Press the Delete button and OK to confirm delete.

**Result:** The Contact and all pages within the selected Contact have been deleted.
Add Communication

Introduction This section explains how a user creates a new communication for an existing Contact.

Conditions None

Procedure How to create a new Contact communication.

From the Main screen:

1. Select the Contacts icon.
2. Select the My, Team or All Contacts icon.
3. Select the Contact Code link to open the Contact to add the communication to.
4. Press the Add Communication button, an adding new Communication screen will appear.

Continued on the next page
5. Enter the subject for the communication.

6. Press tab to move between fields as required.

7. Accept the default or select from the drop down list the Organisation the communication is on behalf of.

8. Accept the default or select from the drop down list the communication type.

9. Select from the drop down list the communication priority.

10. Enter the communication details.

11. Accept the default or select from the drop down list the communication Contact.

12. Press the Save button.

**Result:** A new communication for the selected Contact has been created.

**Please note:** The default status for the communication once saved is setup within the Greentree, CRM, System, eCRM, Module Control.
Add Follow-up

**Introduction**
This section explains how a user creates a new follow-up for an existing Contact.

**Conditions**
None

**Procedure**
How to create a new Contact Follow-up.

From the Main screen:

1. Select the Contacts icon.
2. Select the My, Team or All Contacts icon.
3. Select the Contact Code link to open the Contact to add the communication to.
4. Press the Add Follow-up button, an adding new Follow-up screen will appear.

5. Enter the Summary for the Follow-up.
6. Press tab to move between fields as required.
7. Accept the default or select from the search field the Organisation the follow-up relates to.
8. Accept the default or select from the search field the follow-up type.

*Continued on the next page*
9. Accept the default or select from the search field the Contact that the follow-up relates to.

10. Enter the Start and Due Dates. The Start Date represents the date on which the eCRM user needs to commence work on the Follow-up. The Due date is the date on which work on the Follow-up should be completed.

11. Update the Follow-up status to represent the current state that the follow-up is in.

12. Tick the reminder option if you wish to receive a reminder (in Greentree) regarding the Follow-up.

13. Tick the Complete option to indicate that the Follow-up has been completed.

14. Select a Reference Type if the Follow-up relates to a specific record in Greentree. If selected, you need to select the Reference Code in order to link the Follow-up to the specific record it relates to.

15. Enter the Follow-up detail.

16. Press the Save button.

Result: A new Follow-up for the selected Contact has been created.
## Related

<table>
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<tr>
<th>Introduction</th>
<th>This section explains how to view records related to Contacts.</th>
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</thead>
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<td>Conditions</td>
<td>None</td>
</tr>
<tr>
<td>Procedure</td>
<td>How to view related records.</td>
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<td></td>
<td>From the Main screen:</td>
</tr>
<tr>
<td></td>
<td>1. Select the Contacts icon.</td>
</tr>
<tr>
<td></td>
<td>2. Select the My, Team or All Contacts icon.</td>
</tr>
<tr>
<td></td>
<td>3. Select the Contact Code link to open the Contact to view</td>
</tr>
<tr>
<td></td>
<td>the related records for.</td>
</tr>
<tr>
<td></td>
<td>4. Select the Related icon.</td>
</tr>
<tr>
<td>Result:</td>
<td>The records related to the selected Contact are listed.</td>
</tr>
<tr>
<td></td>
<td>5. Move the mouse over the Code or Description link to view</td>
</tr>
<tr>
<td></td>
<td>summary information relevant to the record type as required.</td>
</tr>
<tr>
<td></td>
<td>6. Select the Code or Description link to view additional</td>
</tr>
<tr>
<td></td>
<td>details for the selected related record as required and the</td>
</tr>
<tr>
<td></td>
<td>OK button to close once viewed.</td>
</tr>
<tr>
<td>Please note:</td>
<td>Related records can be sorted by Date/Time, Code and Description.</td>
</tr>
</tbody>
</table>
Search

Introduction
This section explains how to run a Contact search.

Conditions
None

Procedure
How to run a Contact search.

From the Main screen:

1. Select the Contacts icon.
2. Select the Search Contacts icon.
3. Enter the search criteria into the search field, press tab to move between fields as required.
4. Select the code, surname, name, email or phone from the drop down list to search by.
5. Select the additional search criteria from the drop-down list:
   - Starts With: The search text is matched against the first number of characters of the Search By field.
   - Equal To: The search text is matched against the full Search By field to determine if a direct match exists.
   - Contains: The search text is matched against any portion of the Search By field to determine if the search text appears anywhere within the Search By field.
6. Select from the drop down list the all, mine or team view to filter the search by or accept the default.
7. Select from the drop down list the status to filter the search by or accept the default.
8. Press the ‘Search Now’ button to run the search. The first 20 records that match the search criteria will be displayed.
9. Select the Contact Code link to view and edit details for the Contact.

Continued on the next page
**Result:** A Contact search has been run.

Note: Advanced search options are available through the Advanced Options link. This feature allows you to base the Contact Search on a number of additional search criteria, such as Contact Tree, Organisation Tree, Tree Branch, Occupation, Date of Birth, Gender and Interests.

- Enter / tick the advanced search options you wish to use.
- Select Save on the Advanced Search Options screen.
- If you included Contact / Organisation Trees in the search, then the Tree criteria is available for you to select once the 'Search Now' button has been selected.

**Result:** The Contact list is filtered to display only the Contacts that meet the search criteria and the advanced criteria selected.
Download Contact List

Introduction  This section explains how to download a list of Contacts.

Conditions  Greentree > User Preferences > CRM button > eCRM tab, Allow download of Lists determine if this feature is available to the eCRM user.

Procedure  How to download a list of Contacts.

From the Main screen:

1. Select the Contacts icon.
2. Select the Search Contacts icon.
3. Select the ‘Download List’ link.
4. Enter the directory to which the Contacts download .csv file should be saved.

Result:  A .csv (comma delimited) file containing all the CRM Contacts are created.
Internal User - Quote Functions

Search Quotes

Introduction
This section explains how a user can search the list of Quotes that the eCRM User is assigned to, or the eCRM User’s Teams are assigned to, or view the full list of CRM Quotes.

Conditions
The eCRM User’s Greentree User Privileges determine if All / Team Contacts can be viewed.

Only Sales Quotes can be accessed through this feature.

Procedure
How to search the list of CRM Quotes.

From the Main Menu:
1. Select the Quotes icon.
2. The Quotes Menu is displayed.
3. Select the fields that you wish to base the Quote search on from the BY drop-down list. You can search based on Quote Number, Summary or Detail.
4. Enter the Search criteria into the Search field, based on the BY field you selected.
5. Click the Search Now button.

6. You can drill-down on the Quote Number to access the Quote detail.

Result: The list of CRM Quotes that meet the search criteria is displayed.
View Quotes

Introduction
This section explains how a user can view the list of Quotes that the eCRM User is assigned to, or the eCRM User’s Teams are assigned to, or view the full list of CRM Quotes.

Conditions
The eCRM User’s Greentree User Privileges determine if All / Team Contacts can be viewed.

Only Sales Quotes can be accessed through this feature.

The Home Page Display of records is only available in eCRM if turned on in Greentree eCRM Module control.

Procedure
How to view the list of CRM Quotes.

From the Main Menu:

1. Select the Active Quotes link listed under the Up-coming Tasks heading on the Home Page display.

2. The Search Quotes page is displayed, with the Quotes Table pre-filled with all the Active Quotes that you are authorised to view.

3. Click on the Quote Number to view the detail of the selected Quote.

Continued on the next page
Result: The list of active CRM Sales Quotes is displayed.

Please Note: If the Home Page display of Active Quotes is not turned on or you wish to view Sales Quotes of another status (not Active), then follow the steps documented under the Search Quotes topic above.
Change Quote

Introduction  This section explains how a user can change the detail of a Quote.

Conditions   The eCRM User needs to have authorisation in Greentree User Privileges to Change a Quote.

Only Sales Quotes can be changed through this feature.

Procedure  How to change the detail of a Quote.

From the Main Menu:

1. Select the Quotes icon.
2. The Quotes Menu is displayed.
3. Perform a search on Quotes in order to retrieve the Quote you wish to maintain. Please refer to the Search Quotes Topic documented above.
4. Drill-down on the Quote Number of the Quote that you wish to modify.
5. The View Quote page is displayed, listing the detail of the Quote in Read-only mode.
6. Select the Change Quote menu option from the Quote sub-menu.
7. The Change Quote page is displayed, listing the detail of the Quote in Read/Write mode.

Continued on the next page
8. All fields with white background can be maintained.

9. Maintain the Quote fields as required.

10. Click the Save button.

**Result:** The Quote changes are saved and the updated Quote is available through Greentree > CRM > Sales and Marketing > Quote Maintenance.
Add Line to Quote

**Introduction**

This section explains how a user can add a new Line item to an existing Quote.

**Conditions**

The eCRM User needs to have authorisation in Greentree User Privileges to Change a Quote.

Only Sales Quotes can be changed.

Only Inventory Line items can be created.

**Procedure**

How to add a new line item to an existing Quote.

From the Main Menu:

1. Select the Quotes icon.

2. The Quotes Menu is displayed.

3. Perform a search on Quotes in order to retrieve the Quote you wish to maintain. Please refer to the Search Quotes Topic documented above.

4. Drill-down on the Quote Number of the Quote for which you want to Add a new Line item.

5. The View Quote page is displayed, listing the detail of the Quote in Read-only mode.

6. Select the Add Line menu option from the Quote sub-menu.

7. The Add new Line item for Quote page is displayed.

*Continued on the next page*
8. Select the Stock Code through the use of the search field. You can search for the Inventory item through the use of any one of the Inventory Item code, keywords, description, barcode or alias. Supplier, Location and Inventory Tree are available as additional search criteria.

9. Price Book defaults from the Quote Header. Select another Price Book from the drop-down list, if required. Price Book is a compulsory field.

10. Enter the required Quantity. Quantity is a compulsory field.

11. Enter any of the remaining optional fields.

12. Click the Save button.

**Result:** The new Quote Line item is created and listed in the Quote table.
Change Quote Line item

Introduction
This section explains how a user can change an existing Line item on a Quote.

Conditions
The eCRM User needs to have authorisation in Greentree User Privileges to Change a Quote.

Only Sales Quotes can be changed.

Procedure
How to change an existing line item on a Quote.

From the Main Menu:

1. Select the Quotes icon.
2. The Quotes Menu is displayed.
3. Perform a search on Quotes in order to retrieve the Quote you wish to maintain. Please refer to the Search Quotes Topic documented above.
4. Drill-down on the Quote Number of the Quote for which you want to Change an existing Line item.
5. Select the Change Quote menu option from the Quote sub-menu.
6. Drill-down on the Line Number of the Line item that you wish to change.
7. The Change Line item for Quote page is displayed, listing the detail of the selected Line.
8. Maintain any of the fields with a white background, as required.
9. Click the Save button.

Result: The existing Quote Line item is updated and listed in the Quote table.
Delete Quote Line item

Introduction
This section explains how a user can delete an existing Line item on a Quote.

Conditions
The eCRM User needs to have authorisation in Greentree User Privileges to Change a Quote.

Procedure
How to delete an existing line item on a Quote.

From the Main Menu:

1. Select the Quotes icon.
2. The Quotes Menu is displayed.
3. Perform a search on Quotes in order to retrieve the Quote you wish to maintain. Please refer to the Search Quotes Topic documented above.
4. Drill-down on the Quote Number of the Quote for which you want to Delete existing Line items.
5. Select the Delete Items menu item from the Quote Sub-menu.
6. The Delete Quote page is displayed, listing the detail of the selected Quote in read-only mode.

 continued on the next page
7. Tick the Select option for each line item in the Line items table that you wish to delete. If you wish to delete all Line items, tick the Select option in the Column Header.

8. Click the Delete Line Items button.

**Result:** The selected Quote Line items are permanently removed from the Quote.
### Delete Quote

#### Introduction
This section explains how a user can delete an existing Sales Quote.

#### Conditions
The eCRM User needs to have authorisation in Greentree User Privileges to Delete a Quote.

#### Procedure
How to delete an existing Sales Quote.

From the Main Menu:

1. Select the Quotes icon.
2. The Quotes Menu is displayed.
3. Perform a search on Quotes in order to retrieve the Quote you wish to delete. Please refer to the Search Quotes Topic documented above.
4. Drill-down on the Quote Number of the Quote you wish to delete.
5. Select the Delete Items menu item from the Quote Sub-menu.
6. The Delete Quote page is displayed, listing the detail of the selected Quote in read-only mode.
7. Tick the Select option in the Column Header in order to auto tick the Select option for all the Line items.
8. Click the Delete Line Items button.
9. The Delete Quote page is refreshed and the Line Items table is not displayed.

---

**Delete Quote**

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<th>Quotes Menu</th>
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</thead>
<tbody>
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<tr>
<td>Add Line</td>
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</table>

**DELETE QUOTE**

<table>
<thead>
<tr>
<th>Number</th>
<th>Goods</th>
<th>Summary</th>
<th>Others for Sale</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Organization**

- Name: [Name]
- Contact: [Contact]
- Campaign: [Campaign]
- Activity: [Activity]
- Sales Person: [Sales Person]
- Stage: [Stage]

**Delete Quote**

- Select: [Select]
- Net: [Net]
- Total: [Total]
- Margin: [Margin]

**(Continued on the next page)**
10. Click the Delete Quote button.

**Result:** The displayed Quote is permanently removed from the Greentree database.
Add Quotes

Introduction This section explains how a user can create a new Quote in eCRM.

Conditions The User needs to have authorisation (Add Quotes) set in Greentree User Privileges in order to create a new Quote.

Only Sales Quotes can be created through this feature.

Procedure How to create a new CRM Quote.

From the Main Menu:

1. Select the Quotes menu item.
2. The Quotes Menu is displayed.
3. From the Quotes Menu, select the Add Quote menu item.
4. The Adding new Quote page is displayed.

5. Enter a Summary (meaningful short description) for the Quote.

Continued on the next page
6. Select the Organisation that the Quote is for through the use of the search field.

7. Select the Contact person that you deal with at the Organisation through the use of the search field. Contact is optional.

8. Select the relevant Campaign through the use of the search field, if the Quote resulted from a Campaign.

9. Select the relevant Campaign Activity through the use of the search field, if the Quote resulted from a specific Campaign Activity.

10. Select a Sales Person or update the default Sales Person through the use of the search field. Sales Person is mandatory.

11. Change the default Quote Stage, if required, through selecting another Stage from the drop-down list provided.

12. Select the Internal Branch within your Company that the Quote applies to through the use of the drop-down list provided.

13. Select a Price Book or modify the default Price Book, if required.

14. Click on the Delivery tab to enter Delivery Details for the Quote.

15. Select the Delivery Address Number through the use of the search field.

16. The remaining Delivery fields default based on the Delivery Address Number selected.

17. Modify Delivery details, if required.

18. Select the Custom tab.

**Please Note:** The system determines on save of the Quote if the Quote has a common Tree with any of the following: Campaign, Contact or Organisation. If so and the Tree Branch has not been selected, then the Tree Branch defaults to that of the common Tree in the order specified.

19. Select a Branch for each Quote Tree, if applicable.

20. Enter values for the Quote Fields, if applicable.

*Continued on the next page*
21. Select the Notes tab.

22. Enter general text regarding the Quote in order to capture all details required.

23. Select the Save button.

**Result:** The new Quote is saved and available through Greentree > CRM > Sales and Marketing > Quote Maintenance.
Internal User – Other Functions

Add Communication

Introduction This section explains how to create a Communication from eCRM.

Conditions None

Procedure How to create a new Communication.

From the Main screen:

1. Select the Add Communication icon.
2. The Adding New Communication screen is displayed.
3. Enter the Summary for the communication.
4. Press tab to move between fields as required.
5. Accept the default or select from the drop down list the communication type.
6. Select from the drop down list the communication priority.
7. Enter the communication details.
8. Select the Organisation that the Communication relates to from the search field.

Continued on the next page
9. Accept the default or select the Contact that the Communication relates to from the search field.

10. Press the Save button.

**Result:** A new communication for the selected Contact has been created.

**Please note:** The default status for the communication once saved is setup within the Greentree, CRM, System, eCRM, Module Control.
Add Follow-up

Introduction
This section explains how to create a Follow-up from eCRM.

Conditions
None

Procedure
How to create a Follow-up.

From the Main screen:

1. Select the Add Follow-up icon.
2. The Adding New Follow-up screen is displayed.
3. Enter the Summary for the Follow-up.
4. Press tab to move between fields as required.
5. Select the Organisation the follow-up relates to through the use of the search field.
6. Accept the default or select from the search field the follow-up type.
7. Accept the default or select from the search field the Contact that the follow-up relates to.
8. Enter the Start and Due Dates. The Start Date represents the date on which the eCRM user needs to commence work on the Follow-up. The Due date is the date on which work on the Follow-up should be completed.

Continued on the next page
9. Update the Follow-up status to represent the current state that the follow-up is in.

10. Tick the reminder option if you wish to receive a reminder (in Greentree) regarding the Follow-up.

11. Tick the Complete option to indicate that the Follow-up has been completed, if relevant.

12. Select a Reference Type if the Follow-up relates to a specific record in Greentree. If selected, you need to select the Reference Code in order to link the Follow-up to the specific record it relates to.

13. Enter the Follow-up detail.

14. Press the Save button.

Result: A new Follow-up has been created.
Search Inventory

Introduction  This section explains how to perform an Inventory Search.

Conditions  None

Procedure  How to search Inventory.

From the Main screen:

1. Select the Inventory Search icon.
2. The List of All Items screen is displayed.

3. Enter criteria to filter the number of Inventory Items retrieved from display. The following criteria is available:
   1. Search criteria field: Enter the criteria for the search, based on the search field you select. One of the following Inventory item search fields can be selected:
      1. Description
      2. Keywords
      3. Barcode
      4. Alias
      5. Item Code
      • Supplier: Select the Supplier from the drop-down list or accept the default of <all>.
      • Location: Select the Location from the drop-down list or accept the default of <all>.

Continued on the next page
4. Press tab to move between fields as required.

5. Select the ‘Search Now’ button to retrieve the Inventory items that meet the criteria entered.

6. Select the ‘Tree Search’ button if you wish to have the Inventory Tree available as additional criteria.
   - Select the applicable Tree from the drop-down list.

**Result:** The Inventory items that meet the search criteria are displayed.

**Please Note:** You can drill-down on the Inventory Item code to gain access to the detail of the Inventory Item:
External User Functions

View Organisation

Introduction
This section explains how to view the external eCRM User’s Organisation detail.

Conditions
If the eCRM User’s Organisation is not of Relationship Type ‘Customer’, then the View organisation is the default view displayed upon login of eCRM.

Procedure
How to view the external eCRM user’s Organisation.

From the Main screen:

1. Select the View Org icon.

Result: The external eCRM User’s Organisation is displayed.
View Contacts

Introduction
This section explains how to view the list of Contacts for the external eCRM User’s Organisation.

Conditions
None.

Procedure
How to view the list of Contact for the external eCRM user’s Organisation.

From the Main screen:

1. Select the Contacts icon.

**Result:** The list of Contacts for the external eCRM User’s Organisation is displayed.

**Note:** You can drill-down on the Contact Code to view the detail of the Contact.
View Related for Contact

**Introduction**
This section explains how to view the list of related records for a Contact which forms part of the external eCRM User's Organisation.

**Conditions**
None.

**Procedure**
How to view the list of related records for a Contact who forms part of the external eCRM user's Organisation.

From the Main screen:

1. Select the Contacts icon.
2. Select the Contact Code of the Contact for whom you wish to view the list of related records.
3. The View Contact screen is displayed.
4. Select the Related icon.
5. The Related for 'Contact' screen is displayed.

**Result:** The list of related records for the Contact is displayed.

**Note:** You can drill-down on the related record's Code or Description to gain access to the detail of the record.
Change Contact

Introduction
This section explains how to change the detail of a Contact who forms part of the external eCRM User’s Organisation.

Conditions
None.

Procedure
How to change the detail for a Contact.

From the Main screen:

1. Select the Contacts icon.
2. Select the Contact Code of the Contact whom you wish to change.
3. The View Contact screen is displayed.
4. Select the Change Contact icon.
5. The Change Contact screen is displayed.

6. Update the fields as required. Note: Several tabs are available which hosts additional fields that you may wish to complete.

7. Select the Save button.

Result: The detail for the selected Contact has been updated.
Create Contact

Introduction
This section explains how to create a new Contact for the external eCRM User’s Organisation.

Conditions
None.

Procedure
How to add a Contact to the external eCRM user’s Organisation.

From the Main screen:

1. Select the View Org icon.
2. The View Organisation screen is displayed.
3. Select the Add Contact button.
4. The Adding New Contact screen is displayed.

5. Enter detail in all fields marked with an asterisk (*). These fields are mandatory.

6. Enter detail in any other fields. These fields are optional. Note: Several tabs are available, which hosts additional fields that you may wish to complete.

7. Select the Save button.

Result: The new Contact has been added to the external eCRM User’s Organisation.
View Related for Organisation

Introduction
This section explains how to view the list of related records for the external eCRM User’s Organisation.

Conditions
None.

Procedure
How to view the list of related records for the external eCRM user’s Organisation.

From the Main screen:

1. Select the Related icon.
2. The Related for ‘Organisation’ screen is displayed.

Result: The list of related records for the external eCRM User’s Organisation is displayed.

Note: You can drill-down on the related record’s Code or Description to view the detail of the record.
Change Organisation

**Introduction**

This section explains how to change the external eCRM User’s Organisation detail.

**Conditions**

None

**Procedure**

How to update the external eCRM user’s Organisation detail.

From the Main screen:

1. Select the Change Org icon.

2. The Changing Organisation screen is displayed.

3. Maintain the fields as required.

4. Select the Save button.

**Result:** The external eCRM User’s Organisation is updated.
View Account

**Introduction**

This section explains how to view the external eCRM User’s Account detail.

**Conditions**

If the eCRM User’s Organisation is not of Relationship Type ‘Customer’, then the Account icon is not available.

If the eCRM User’s Organisation is of Relationship Type ‘Customer’, then the Account detail is displayed upon logging into eCRM.

**Procedure**

How to view the external eCRM user’s Account.

From the Main screen:

1. Select the Account icon.
2. The Account Enquiry for Organisation screen is displayed.

**Result:** The external eCRM User’s Account detail is displayed.
Glossary

**Database**
A file composed of records each containing fields, with a set of operations for searching, sorting, combining and other functions.

**Database Administrator**
An individual responsible for the design and management of the database. The administrator determines the content, internal structure and accesses strategy for the database, defines security and integrity of the data structure.

**Contact Header**
The completed header information fields on a Contact. eCRM Contact header information fields are Full Name, Surname and Code, Organisation, Status and Relationship.

**Organisation Header**
The completed header information fields on an Organisation. eCRM Organisation header information fields are Name, Alpha, Code, Parent Organisation, Status and Relationship.

**eCRM**
Web-based access to the Greentree Contacts and Relationship module.

**Internal User**
An eCRM user that has access to Greentree, therefore a Greentree Username and Password.

**External User**
An eCRM user that does not have access to Greentree, but exists within the Greentree database as an Organisation or Organisation and Contact.