CRM Tasks and Notes

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Overview

SalesPad Customer Relationship Management (CRM) allows tasks to be scheduled and notes to be recorded for each customer. A CRM tab is available in the Customer Card.

Note: This document covers setup and usage for the Customer Card CRM tab. A CRM tab is also available on the Vendor Card, and information about that tab can be found in the SalesPad Vendor Card document.

Security

Enable the following security settings in Modules > Security Editor (filter to "*CRM" to find them quickly):

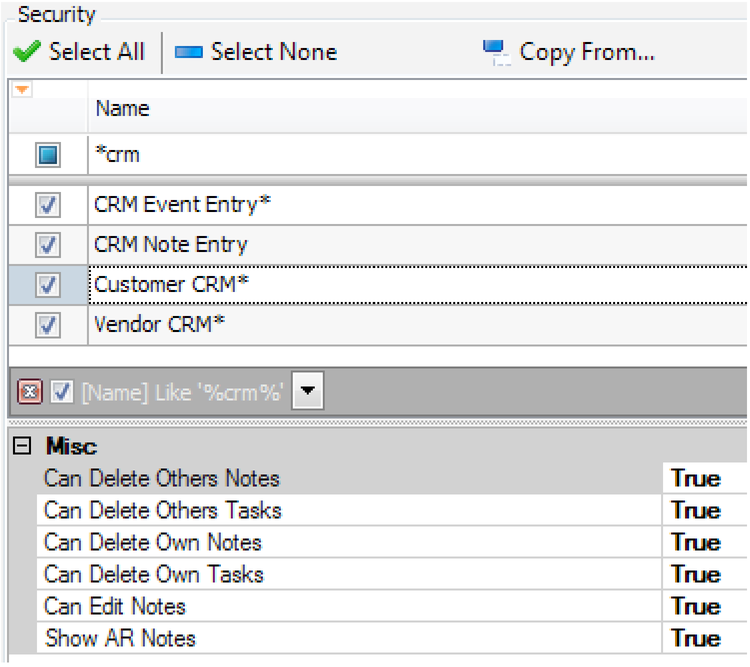
Customer Card – Access to the customer card must be enabled.

CRM Event Entry – Enables the **Tasks** button on the CRM tab – allows users to create CRM Tasks

CRM Note Entry – Allows Access to CRM Note Entry on the CRM tab on the Customer Card. If disabled, users will see tasks but not be able to enter their own notes

Customer CRM – Enables the CRM tab on the Customer Card

Each CRM-related security setting has its own **Misc** sub-settings to allow different CRM actions; enable sub-settings as needed. Refer to the SalesPad Security Settings document for more details.



Save any changes.

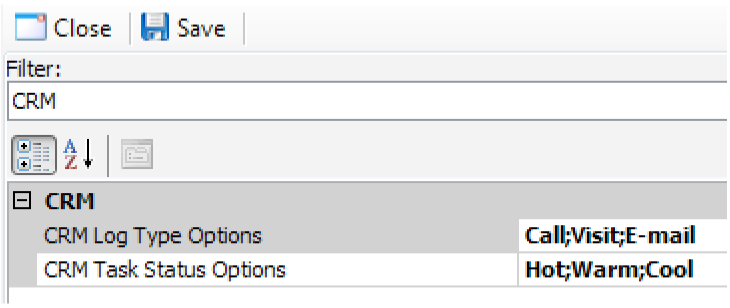
Note: You must log out and then back in for security changes to take effect.

Settings

1. Filter to “CRM” in Modules > Settings

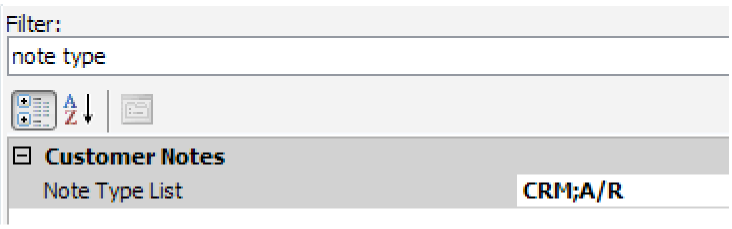
   CRM Log Type Options – Set values for the Type dropdown field within CRM Task Entry. Example: Call;Email;Fax;

   CRM Task Status Options – Set values for the Status dropdown field within CRM Task Entry. Example: To-Do; Complete; In-Process;

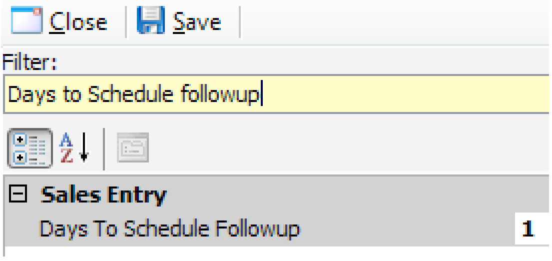
   

2. Filter to “Note Type”

   Note Type List – Set values for the Type drop--down field/column within the CRM Contact Log (Appears in the Type column on the right--hand side of the Customer Card CRM tab). Example: CRM; A/R

3. Filter to “Days to Schedule Followup”



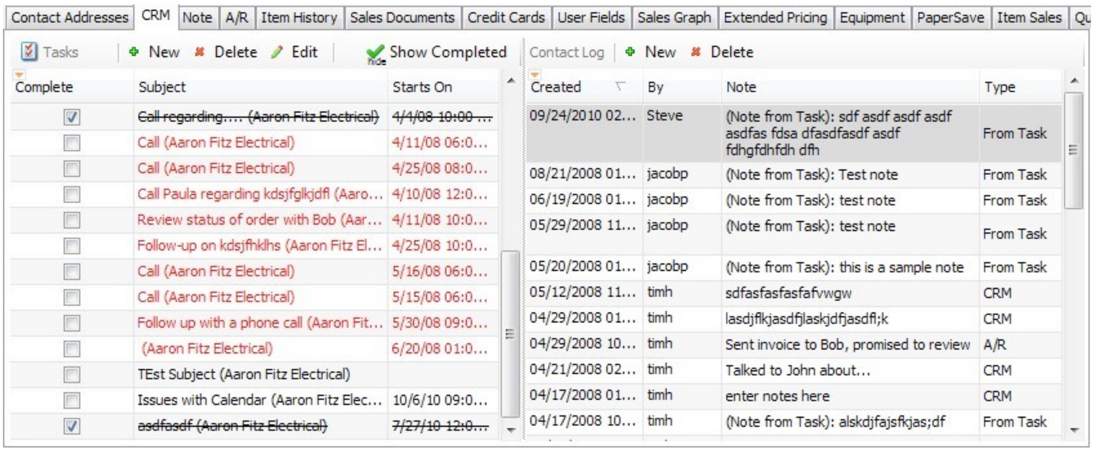
Enter the number of days after a quote is created to follow-up with customer. This will automatically create a CRM task with the customer's info. By default, tasks will be created for 8 am and set with a 10 minute duration and a reminder 5 minutes before the scheduled start time.

Note: Follow-up tasks are auto-generated; no other settings need to be changed or configured for this to function.

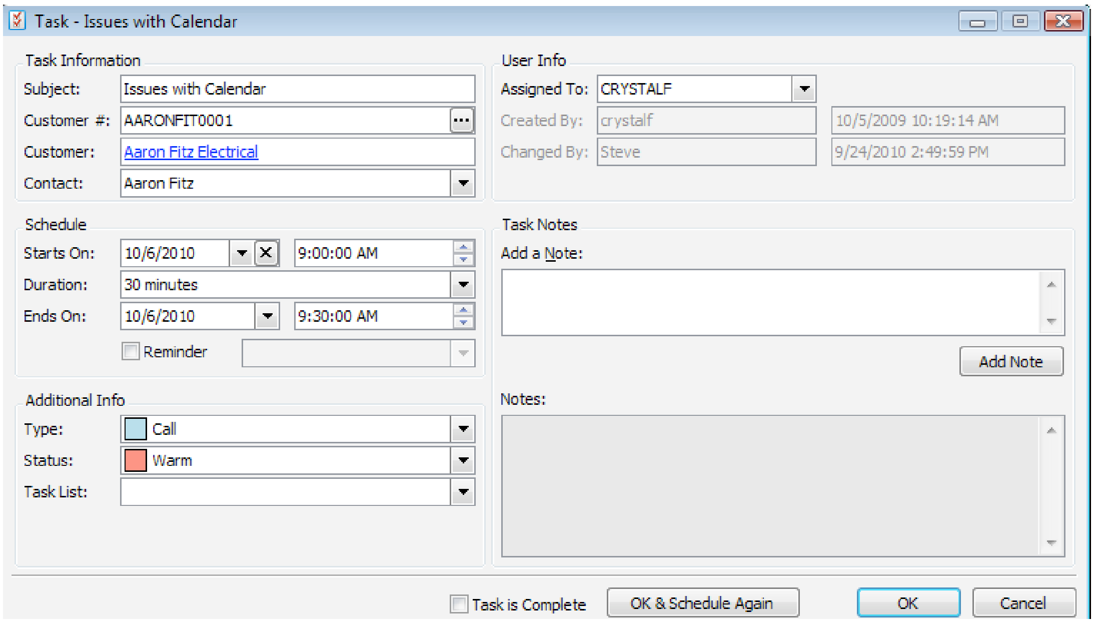
4. Save any changes.

   Note: You must log out and then back in for changes to take effect.

Select the CRM tab on the customer card:



- When a task is past due it will appear in red, when a task is marked as complete it will appear with a line going through it. Tasks for the future are plain black.
- If you do not wish to show the completed tasks, click **Show Completed**. This is a toggle button, so clicking more than once will show/hide the options.
- On the right side of the screen is a list of notes created from tasks, CRM or the customer card A/R tab. If security is enabled, these can be edited directly on the line.
- Any items created in the CRM tab can also be shown under the SalesPad Today module (Modules > SalesPad Today). Refer to the SalesPad Today document for more details. To add a new CRM task, Click **New**. The Task Entry Screen appears:



- You can select a customer by clicking the ellipsis (**...**) next to Customer # and conducting a customer search.
- If you set Starts On and Ends On as two different dates, tasks will display for the duration of time between the two dates
- Check the **Reminder** box to have a window appear in SalesPad to notify you about the task before it occurs.
- Select Type and Status from the corresponding dropdowns. See the Settings section of this document to change the Type or Status options.
- Enter a name into the Task List field —any Task Lists with the same name will be arranged into groups. These groups can be viewed in SalesPad Today (Modules > SalesPad Today).
- If security is enabled, you can create and assign tasks to other SalesPad users from the Assigned To dropdown.
- Notes entered under Add a Note will appear as a From Task type on the right side of the CRM tab.

Note: CRM notes will only save up to 7864 characters.

Note: CRM tasks can also be created automatically from a sales document. Refer to the Sales Document Tasks document for more information.

Note to Microsoft Outlook users: CRM Tasks created in SalesPad can automatically be added to your Outlook calendar by using the SalesPad GP Outlook Add--in. This inexpensive add--in allows Outlook users to send customer emails to SalesPad CRM Notes and pull SalesPad CRM Tasks onto their Outlook calendar. Learn more at www.cavallo.com