



CRM Tasks and Notes

Megan De Freitas - 2024-11-22 - CRM

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.

Security

Select All | Select None |

Name
<input type="checkbox"/> *crm
<input checked="" type="checkbox"/> CRM Event Entry*
<input checked="" type="checkbox"/> CRM Note Entry
<input checked="" type="checkbox"/> Customer CRM*
<input checked="" type="checkbox"/> Vendor CRM*

[Name] Like '%crm%'

Misc

Can Delete Others Notes	True
Can Delete Others Tasks	True
Can Delete Own Notes	True
Can Delete Own Tasks	True
Can Edit Notes	True
Show AR Notes	True

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;

|

Filter:
CRM

CRM

CRM Log Type Options	Call;Visit;E-mail
CRM Task Status Options	Hot;Warm;Cool

2. Filter to "Note Type"

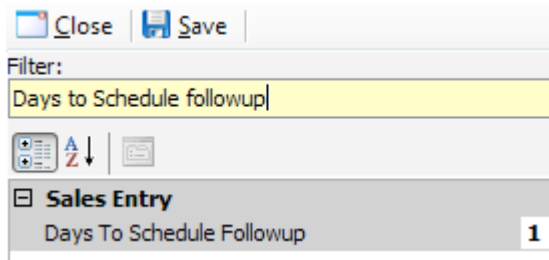
Note Type List - Set values for the Type dropdown field/column within the CRM Contact Log (Appears in the Type column on the right-hand side of the Customer Card CRM tab). Example: CRM; A/R

Filter:
note type

Customer Notes

Note Type List	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:

Tasks			Contact Log			
Complete	Subject	Starts On	Created	By	Note	Type
<input checked="" type="checkbox"/>	Call regarding... (Aaron Fitz Electrical)	4/4/08 10:00...	09/24/2010 02...	Steve	(Note from Task): sdf asdf asdf asdf asdfas fdsa dfasdfasdf asdf fdhgfdhfdh dfh	From Task
<input type="checkbox"/>	Call (Aaron Fitz Electrical)	4/11/08 06:0...	08/21/2008 01...	jacobp	(Note from Task): Test note	From Task
<input type="checkbox"/>	Call (Aaron Fitz Electrical)	4/25/08 08:0...	06/19/2008 01...	jacobp	(Note from Task): test note	From Task
<input type="checkbox"/>	Call Paula regarding kdsjfglkjdfi (Aaro...	4/10/08 12:0...	05/29/2008 11...	jacobp	(Note from Task): test note	From Task
<input type="checkbox"/>	Review status of order with Bob (Aar...	4/11/08 10:0...	05/20/2008 01...	jacobp	(Note from Task): this is a sample note	From Task
<input type="checkbox"/>	Follow-up on kdsjfhkhs (Aaron Fitz El...	4/25/08 10:0...	05/12/2008 11...	timh	sdfasfasfasfawgw	CRM
<input type="checkbox"/>	Call (Aaron Fitz Electrical)	5/16/08 06:0...	04/29/2008 01...	timh	lasdfjlkjasdfjaskdjfdjfdk	CRM
<input type="checkbox"/>	Call (Aaron Fitz Electrical)	5/15/08 06:0...	04/29/2008 10...	timh	Sent invoice to Bob, promised to review	A/R
<input type="checkbox"/>	Follow up with a phone call (Aaron Fit...	5/30/08 09:0...	04/21/2008 02...	timh	Talked to John about...	CRM
<input type="checkbox"/>	(Aaron Fitz Electrical)	6/20/08 01:0...	04/17/2008 01...	timh	enter notes here	CRM
<input type="checkbox"/>	TEst Subject (Aaron Fitz Electrical)	10/6/10 09:0...	04/17/2008 10...	timh	(Note from Task): alskdjfasjfkjas;df	From Task
<input checked="" type="checkbox"/>	asdfasdf (Aaron Fitz Electrical)	7/27/10 12:0...				

- 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