

Ostendo[®] _____

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CRM

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1. Introduction

The Customer Relations Management function allows you to take customer calls and either respond to them immediately or promulgate further action.

1.1. Preparation

The following tables are used within the CRM Function against Calls. There are some already set up but you may wish to add more or amend the current records:

Call Classification: Segregates Calls into logical groups for analysis purposes (e.g. Information, Quote, etc). You can maintain these via [CRM>Settings>Call Classifications](#)

Call Sub-Classification: Segregates Calls into logical sub groups within the Call Classification and is used for analysis purposes (e.g. Follow-Up, Confirmation, etc). You can maintain these via [CRM>Settings>Call Sub-Classifications](#)

Call Resolution Codes: Identifies the resolution identity of the call and is used for analysis purposes (e.g. Brochure Sent, Quote Given, etc). You can maintain these via [CRM>Settings>Call Resolution Codes](#)

2. Contacts

A table of 'Contacts' is maintained in Ostendo that covers Customer and Supplier Contacts (which can also be entered via the Sales and Purchasing) plus Prospects and Others that can only be maintained here.

2.1. Creating a Contact

To create a Contact go to [CRM>Contacts](#) where you will see that some Contacts already exist. Add you own contact and link that contact to (say) Customer '**Jim Gold & Co Ltd**'.

You should note that if the Contact has an email address then you can 'double click' on the address and it will bring up your PCs email facility prefilled with this email address.

2.2. Copy Contacts to 'Outlook'

You can copy the generated Contact's details to your Microsoft Outlook's Address Book by clicking on the 'Outlook' button to the right of the Contacts screen.

2.3. Contact Properties

This feature allows you to define a 'Property' (Example: Department) and then link this property to selected Contacts with a value that is specific to each Contact (Example: Buying, Accounts, etc)

To demonstrate how this works, go into [General>Settings>General Properties](#) and add 'Department' with Property Type of 'Text'. Click on 'Save' and then 'Close'

Now go to [CRM>Contacts](#) and select the Contact you created above. Click on the 'Related' Button on the right of the screen and select 'Contact Properties'. Click the 'Add' button and:

- Add a line using property 'Department'
- Enter 'Accounts' in the 'Value' field

3. Call Centre

The Call Centre function enables you to:

- Register calls
- Locate an answer where possible
- Answer the Call, or
- Action a response from other personnel
- Monitor the Call
- Close the Call and maintain History

3.1. Registering a Call

Go to **CRM>Call Centre** and click on the **'Add'** button to register a new call. Select the Contact that you created above. To help you progress the Call the following are available

If you click on the drop-down against **'Relates To'** you will see that you can select various options. You should note that any selection except **'Call Only'** allows you to link the call to a specific reference when clicking on the **'Linked To'** field

If you select **'Job Order'** or **'Sales Order'** then the adjacent **'Create Order'** button will become active. This feature allows you to go straight to those areas to immediately generate a Quote or Order from this Call.

Enter details of the Call in the **'Call Notes'** field at the bottom of the screen

3.2. Finding an answer

In progressing the Call the following support facilities are available

3.2.1. Customer Statistics

Click on the **'Related'** button to the right of the screen and select **'Customer Statistics'**. This will provide current and past information about an existing Customer.

3.2.2. Knowledge Base

The Knowledge Base is simply a compilation of answers to questions that have been raised in the past and provide a library of knowledge that can be used in the Call Centre.

The following tables are used within the Knowledge Base function. There are some already set up but you may wish to add more or amend the current records:

Article Types: Article Types are used to analyse Knowledge Base records. These are User-defined and can include such types as:

- Education
- Setup
- How To Examples

Create your own Article Types and add them via **General>Settings>Article Types**

Article Categories: Article Categories are used when analysing Knowledge Base records. Article Categories are User-defined and can include such categories as:

- Internal Information
- Customer Questions

Create your own Article Categories and add them via **General>Settings>Article Categories**

Create a Knowledge Base record by going into **General>Knowledge Base** and clicking the **'Add'** Button. Enter (say) the following information into your first record

Question: How do we tell Ostendo to use the local email client rather than Microsoft Outlook?

Answer: Open Internet Explorer, click the Tools menu, select Internet Options. Click Programs tab and select your email client from the drop-down list. Once selected, click OK/Apply button.

Now go back to the Call that you created above. If you click on the 'Related' button to the right of the screen you can select **'Knowledge Base'**. Search facilities are available then enable you to quickly find any answers if they exist in the Knowledge Base

3.2.3. Price Inquiry

Quite often a Prospect or Customer may wish to know the current sell price of an Item or Descriptor. If you click on the 'Related' button to the right of the screen you can select **'Price Inquiry'** and enter the following

- Customer Name (I.e. Price Level known) or Price level
- Item or Descriptor identity (select from drop-down list)
- Quantity required (to take advantage of any Quantity Price Breaks)
- Unit of Measure (Base unit defaulted - amend from drop-down) for UOM discounts

Upon entering this information a display panel shows the Sell Price and all the applied discounts that enabled the price to be calculated

3.2.4. Inventory Inquiry

Quite often a Prospect or Customer may wish to know if you have stock of a certain Item and, if not, when you are expecting to receive it. If you click on the 'Related' button to the right of the screen you can select **'Inventory Availability'**. This will show, for a selected Item:

- Quantity held by Location
- Click on 'Transaction History' tab to view stock movements
- Click on 'Projected Availability' tab to view projected stock balances taking into account all supply and demand orders in Ostendo
- Click on 'Order Details' tab to view the current Supply and Demand orders

3.3. Action a response from other personnel

If you cannot answer the call yourself you can request further action by clicking on the **'Requires Further Action'** checkbox. This will activate the two fields to the right of the checkbox for you to identify the required response date and the priority. You will also find that a new tab **'Action Information'** appears just above the checkbox. Click on this tab to define the further actions.

Click on the **'Assigned To'** drop-down and select the Employee to whom this Call is being assigned. You can also select a cc Employee in the adjacent field. You can maintain employees via **Labour>Employees** and you should ensure that the selected Employee has an email address if you are going to email this Call Action Request

If you now click the **Email Action** button your PCs email facility will be activated and prefilled with Information about this call including the Call Notes you entered in 3.1.

3.4. Monitoring the Call Actions

If you go into **CRM>Views>Analysis - Call Tickets** you can select and filter the calls by status, Priority, and required response date from the actioned Employee. Once a response has been received the response notes should be entered into the **Action History** field in the **Action Information** tab

If the Action has been completed then 'check' the **Action Completed** checkbox and enter the **Sign-off date** and select the Employee who approved the activity completion

3.5. Reply to the Call

If the call has been resolved either directly or as a result of further actions, then you should identify the final call resolution details in the **Call Resolution Information** tab along with the **Resolution Code**

3.6. Closing the Call

If the Call is to be 'Closed' then simply click on the 'Close Call' button at the bottom of the screen. This will result in the following two activities:

- The status of the Call will be changed to 'Closed'
- The Call Notes will be posted to the Customer or Supplier History record

To see this in action 'Close' off the Call and then go to the Customer record (**Sales>Customers**) and select the Customer against who you raised the above call. If you now click on the **Related** button and select **Customer History Notes** you will see that the Call details have been posted to the Customer's History

4. Service Level Agreements

A Service Agreement comprises of:

- Steps** that should be carried out in response to the Call
- Severity** (or Urgency) Levels that can apply to the Service Agreement
- Response time** required for this **Step/Severity**

	Urgent	Priority	Normal
Respond	1 minute	30 mins	1 hour
On Site	1 hour	2 hours	3 hours
Completed	2 hours	4 hours	6 hours

Each Customer can be allocated a Service Agreement and is given a Service Agreement Code and a Severity Level in the Customer record.

For monitoring your own performance you can identify a target achievement rate expected from each **Step/Severity**

	Urgent	Priority	Normal
Respond	100%	90%	90%
On Site	100%	90%	85%
Completed	100%	80%	70%

Let us see how this works

4.1. Setting up Service Agreements

4.1.1. Service Agreements

Go into **CRM>Settings>Service Agreements** and click the 'Add' button. Now create a new Agreement record called (say) 'Retail'

4.1.2. Agreement Steps

Go into **CRM>Settings>Service Agreement Steps**. Steps are used to provide 'milestones' against which the Call can be progressed and monitored. Add (say) three steps called **Respond**, **On Site**, and **Completed**.

4.1.3. Agreement Levels

Go into **CRM>Settings>Service Agreement Levels**. These are used to identify different Service (or Priority) Levels within the same Service Agreement. Add (say) three Levels called **Urgent**, **Priority**, and **Normal**.

4.1.4. Agreement Measures

We will now pull all the above together. Go into **CRM>Settings>Service Agreement Measures**. Against each combination of Agreement Step and Agreement Level within the Service Agreement you can identify

- The expected Response Time from the time the Call was first received
- The expected level of achievement between the Expected Response Time and the Actual Response time

	Urgent		Priority		Normal	
<i>Respond</i>	1 minute	100%	30 mins	90%	1 hour	90%
<i>On Site</i>	1 hour	100%	2 hours	90%	3 hours	85%
<i>Completed</i>	2 hours	100%	4 hours	80%	6 hours	70%

4.2. Service Agreement Activation

Now lets 'activate' Service Level Agreements. Go into **CRM>Settings>CRM Rules** and enter the following:

Service Level Tracking Activated: 'Check' the checkbox.

Default Service Agreement: From the drop-down list select the Default Service Agreement that will be used when generating a Call. As you have only created one Service level Agreement you should (of course) select that one

Default Severity Level: From the drop-down list select the Service Level within the above Agreement that will be used as the default when generating a Call. You should note that if a Customer has a Service Support Agreement/Service Level identified against the Customer record then that Service Agreement Level will be used in preference to this default. For now select Agreement Level '**Normal**'

4.3. Adding a Service Agreement to a Customer record

4.3.1. Adding the Service Agreement

Go into **Sales>Customers** and select a Customer (say) '**Jim Gold & Co Ltd**' then go to the '**Detail**' tab. Click on the 'Pricing and Invoicing' tab and enter the following:

Service Agreement: Select Service Agreement '**Retail**' from the drop-down list.

Service Agreement Level: Select '**Normal**' from the drop-down list.

4.3.2. Adding a Customer Contact

Whilst still in the Customer screen click on the 'Related' button and select 'Contacts' from the displayed list. (You can also go to this screen via **CRM>Contacts**). Add your own contact and link that to Customer 'Jim Gold & Co Ltd'. You should also note that if the Contact has an email address then you can 'double click' on the address and it will bring up your PC's email facility prefilled with this email address.

4.4. Using Service Level Agreements,

Let us create a Service Call received from the above Customer. Go to **CRM>Call Centre** and click on the 'Add' button to register a new call. Select the Contact that you created above.

You will see two tabs that are visible when you enabled Service Level Tracking in the CRM Rules.

4.4.1. Service Level - Sub Tab

This shows the **Service Agreement** and **Service Level** held against the Customer record. If the Customer does not have a definitive Service Agreement or the source of this call is from other than a Customer then the default that you identified in CRM Rules will be used. Within this tab you can amend the following:

Severity Level: This is prefilled with the Default Service Agreement Level as entered into the CRM Rules screen or the Service Agreement Level as held against a Customer Record. It can be amended here to another Severity Level if required

Notes: You can enter unlimited amount of Notes that are related to this Service Level. If you click in the Notes area you will see two icons appearing in the top-right of the field. If you click on the first icon then the Notes field will occupy a much larger area so that you can see the full content of your notes.

Before we go to the second icon go to **General>Frequently Used Text** and create a common Text Message such as '**This Severity covers Normal Service Agreements**'. Having done that go back to the Service Level - Sub Tab and click on the second icon. A separate screen will appear showing the Frequently Used Text message that you have just created. If you 'double click' on the selected text, to highlight it and click the **OK** button then the text will be copied to these Notes.

4.4.2. Service Response - Sub Tab

This shows all the Steps contained within the Service Level Agreement for the chosen Service Level. This screen shows the Planned Response Date/Time based on the Call's Date and Time and scheduled against each Step based on the Work Times set up in **General>Settings>Work Times**. In this screen you can record the actual time spent on each Step thereby enabling you to analyse the actual response times relative to the agreed Service Agreement response times.

Go into field '**Actual Response Time**' and enter the actual Date/Time when the Step was completed. You can click on the drop-down Calendar and

- Select the Date by clicking on the Day
- Select the Time by clicking on the time element (HH, MM, or SS) and using the up/down arrows
- Selecting the a.m./p.m. field and alternating using the up/down arrows
- Click on the '**Now**' button to select the current Date/Time

Complete each Step with a genuine time so that we can review it in the next section.

5. Activities Events

5.1. Activity Events

Activity Events allow you to set up and maintain Activities and Employees and Company Assets required to support those activities. You can log Events as they arise and then:

- Allocate the Event to an internal Resource
- Add an Event Type and Status
- Determine an estimated start date/time and duration
- Define a Contact Name and details
- Add Activity Notes

Go into **CRM>Activity Events** and click on the **'Add'** button. Add an Activity Event called (say) **'Property Valuation'**. In the remaining fields enter (for example) the following

Event Type: Select **'Business'**

Event Status: Select **'Tentative'**

Description: Enter (say) **'Valuation of Property and Outhouses'**

Resources: Select **'Bob Drum'**

Start Date / Time: Enter the start date and time for this Event.

End Date / Time: Enter the end date and time for this Event.

All Day Event: Leave unchecked

Where: A free-format entry field in which you can enter the Property address.

Contact Type: Select **'Customer'**

Contact Name: Select the Contact that you created in 2.1.

Message: At the bottom of the Activity Events screen there is space to put unlimited Notes that apply to the Event. If you click in the Message area you will see two Icons appearing in the top-right of the field. If you click on the first Icon then the Message field will occupy a much larger area so that you can see the full content of your notes. Before we go to the second Icon go to **General>Frequently Used Text** and create a common Text Message such as "Carry out the following checks.....etc". Having done that go back to this Activity Note and click on the second Icon. A separate screen will appear showing the Frequently Used Text message that you have just created. If you 'double click' on the selected text, to highlight it and click the OK button then the text will be copied to this Message area.

'Save' the record. Now let's have a look at the Event via the 'Activity Calendar'

5.2. Activity Calendar

Go into **CRM>Activity Calendar** and see what we can do with the Activities in this view. This shows all the activities that are scheduled and allows you to schedule your staff, etc

5.2.1. Defining the Calendar

Go into **General>Settings>Work Times** and you will see the current Calendar. The Activity Scheduling function uses this calendar to determine each Activities Start and End Date/Time. Amend the calendar if you wish then **'Save'** the changes

5.2.2. Using the Calendar View

Go into **CRM>Activity Calendar** and you will see a base Calendar View. This view allows you to see what Activities are scheduled and what Resources (Employees and/or Assets) are required to perform the required activities. The main screen is split into three sections

- The main panel shows Resources, when and on what Activity they are required.

- The upper-right panel shows a calendar for you to select the displayed time periods
- The lower- right panel shows all Overdue Activities

Main Panel

The Main Panel shows all Activities scheduled for each day displayed. The Activities on display can be viewed:

- For single or multiple Employees and/or Assets
- Grouped by Resource or Date
- In Daily, Workday, Weekly, Monthly, or user-selected time periods
- With a horizontal Timeline

You can create new Activities from within the Calendar by placing the cursor into the calendar under a Resource and click on a start time and then drag the cursor to an end time. Now right click in the enclosed area and select **'New Event'** from the list. The Activity Event creation screen will appear prefilled with the Timeslot's Start and End date and assigned to this Resource. Enter some Notes to describe the Activity then click the **'OK'** button to generate the Activity Event. The generated Event will immediately appear in the Calendar View.

The following options are available in this screen for you to try.

Time Scale: To amend the timeslots of the visible panel right click on the scale down the left-hand side and select the displayed time intervals.

Multiple Resources per Activity: Once again double-click on the Activity to make the Event Details appear then click on the drop-down against field **'Resource'**. You can select as many resources as required to carry out the Activity. Therefore select another Employee to this Activity then click the **'OK'** button. Upon return to the Calendar you will see that the Activity is now assigned to two employees and If you move one Resource's Start and End time for a Activity then the other Resource's timeline will also move.

Event Status: The Event Status is displayed as a coloured 'band' surrounding the Activity. To see the assigned 'Band' colours double click on the Activity and click on the drop-down against field **'Show Time As'** and select a Status.

Event Type: The Activity Event itself can be colour-coded to provide an immediate view of the Event Type of this Activity. To see the assigned 'Event' colours double click on the Activity and click on the drop-down against field **'Label'** and select a Event Type. This will immediately change the colour-code of this Activity to match the Event Type.

Drag and Drop an Activity: You can drag an Activity allocated to a single Resource and drop:

- Against another Resource
- In the same Resource but to another timeslot

Amend Timeline: You can amend the timeline against an Activity by dragging the Start or End boundary and dragging it to the Required Time

Calendar Panel

To the right of the screen you will see a panel that shows a Calendar by month. You can view more months by dragging the Calendar Panel boundary left/right/up/down to let you view the desired months. Within this panel you will see the following:

Active Days: Any Days that contain an Activity will be in **Bold**. Clicking on this day will bring up that day in the Main Panel.

View Days: If you Drag the cursor over a few days then release, the Main Panel will immediately reflect the selected time-span.

Overdue Activities

At the lower right of the Calendar View you will see a panel that shows all the Activities whose End Date is earlier than the current Date. If you double click on any of these then the calendar will display that date and the selected Activity.