Protean Software

CRM User Guide

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CRM User Guide

Protean Software General Introduction

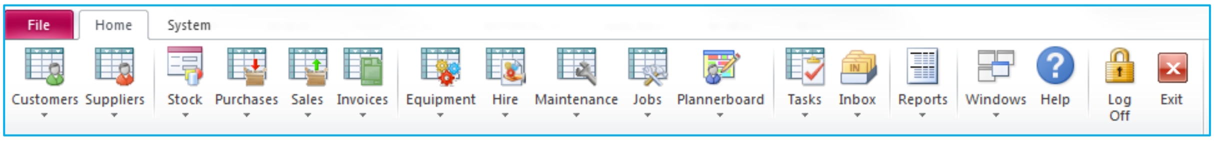
Once you have logged into Protean there are 3 Tabs – File / Home / System.

File: contains information about the version of Protean you are running and contact details for Protean Support.

Home: is the tab that you will go to when logged into Protean, this contains all the items you will use on a day to day basis within Protean.

System: is where the settings and setup of Protean is done, so any configuration details will be done through this tab.

Home Tab: this is what we call the Protean Ribbon:

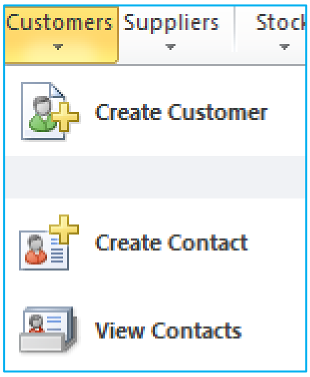


This is broken up into sections for each module that you have access to.

There is a global enquiry button,

and a drop down for each section.

If you hit the dropdown it gives you the other functionality to do with this section of Protean.

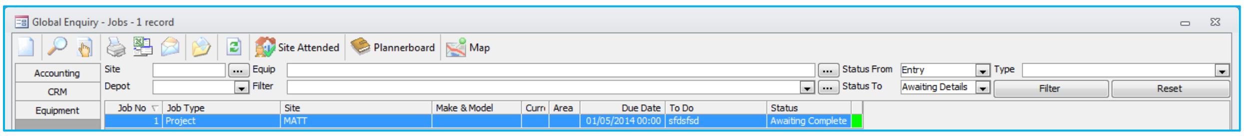


Depending on which section you click on you will get different options.

The example here is the customers section.

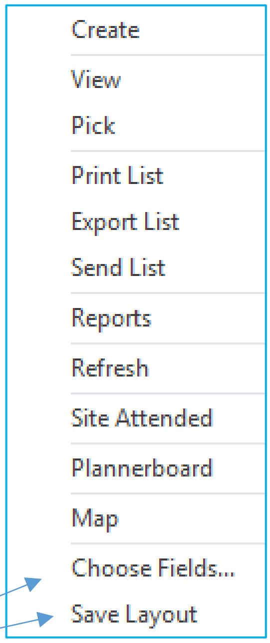
(Again these options can be controlled by access rights).

If you hit the Global Enquiry button, this brings up a list of all the current items within this section of Protean.



These Lists (Global Enquiries) are how each individual user can quickly get the information they need about that particular module of protean.

Every global enquiry has common buttons at the top left, which are also available by right clicking on within the middle of the global enquiry:



Create, creates a new record.

View drills into the record selected.

Pick is used when a global enquiry is bought up within another record.

Print / Export / Send will send your list to Printer / Excel / Email.

Reports will shortut to the reports for this module of Protean

Refresh just refrehses your list (can be set to happen automatically).

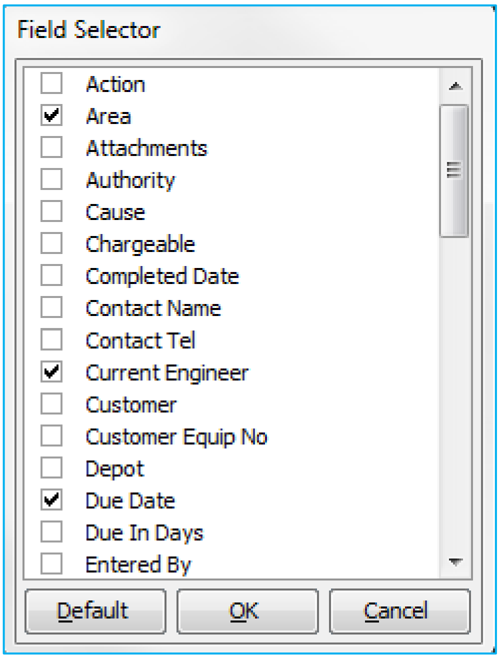
The final 2 options are for customising the Global Enquiry view per user.

Choose Fields brings up a lit of fields you can see, tick any you want, untick any you don't want.

This then dispays these fields this one time you are in the global enquiry.

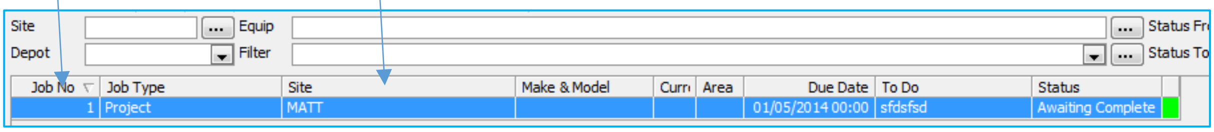
If you wish (per user) to always see these fields, then right click on the global enquiry and click "Save Layout".

Save Layout can also be used to save a users prefernce for a sort order, or column order within each global enquiry screen, which can be achieved by clicking on or dragging a column as below.



Click to sort.

Click and hold to drag



Common Layouts & Features:

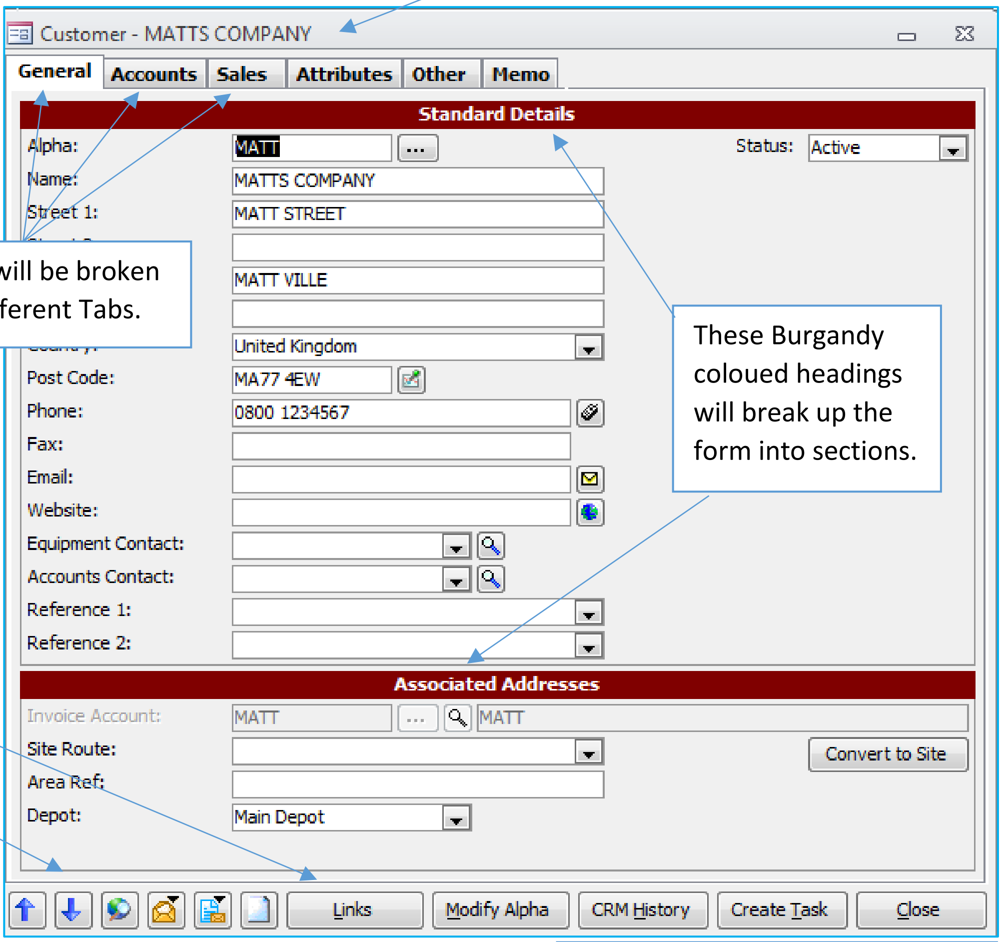
When you are in a record within Protean it will follow a common layout:

The Top left will show you where you are / what you are looking at.

The form will be broken up into different Tabs.

These Burgandy coloued headings will break up the form into sections.

And the bottom of the form will have buttons.



The first 6 are consistant in every module.

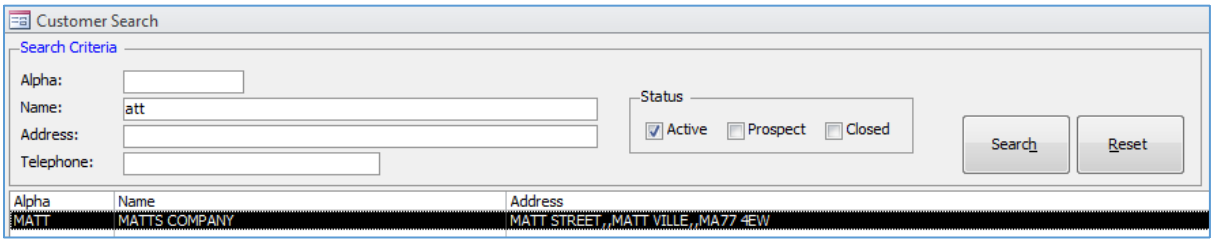
The other ones depend on what type of record you are viewing.

Other Common Features:

These (…) buttons will open up a Search screen.

A Magnifying Glass will Drill into a record and move you to that record in Protean.

If you open up a search screen in Protean, its an automatic smart search, so it will wildcard before and after what you type, and you can fill out any, or a combination of search boxes.

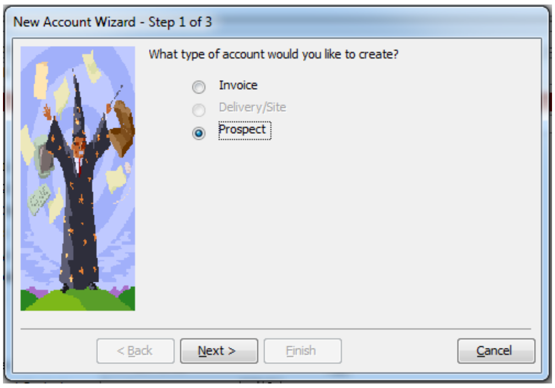


Prospects

Creating a New Prospect:

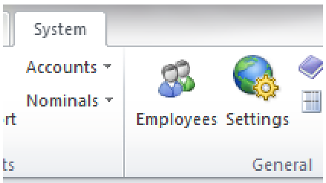
1. To create a Prospect, click on the drop down arrow below the Customers Icon and select Create Customer:

The New Account Wizard will then be displayed:



2. Select “Prospect”, and then click on the “Next” button.
3. Protean will then create an Alpha Code for the Prospect:

The Prefix to this system generated number and what number will be generated, can be setup by clicking on the **System Tab** > **General** > **Settings**:



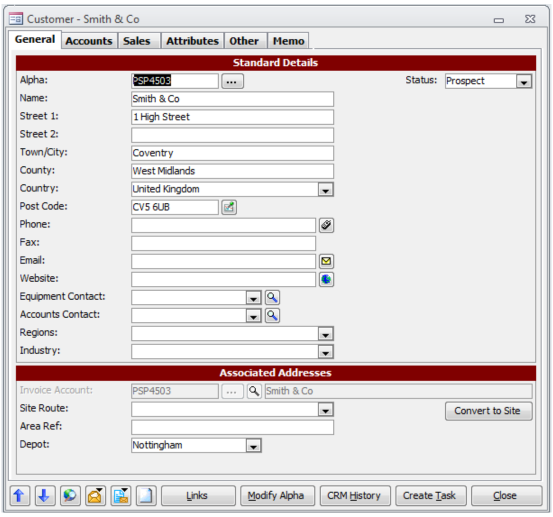
And then entering values in the following fields:

Customer Prospect No	4503
Customer Prospect Prefix	PSP

NB: Recommendation that the prefix is set to ‘ZZ’, which will ensure that all prospective customers appear at the bottom of search lists, separate from Active customers.

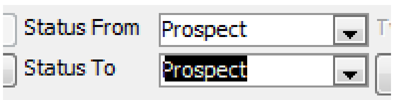
4. Then enter the Name and Address details of the Prospect as required:

5. Once completed, click on the “Finish” button.
6. The screen returns to standard customer details view, with a status of **Prospect**:

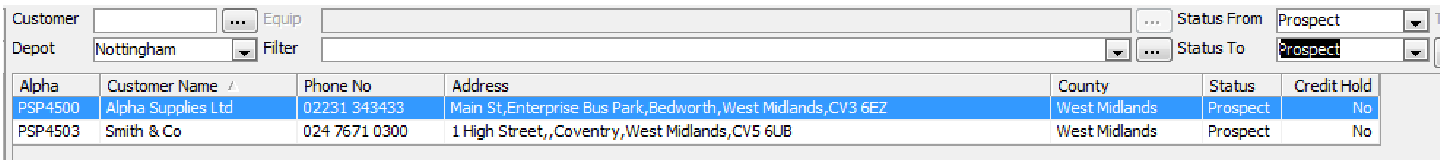


7. Complete the remaining fields on the General tab as required, such as Phone Number, Email etc. When completed, click on the “Close” button.

Prospects setup in this way, can then be searched for in the Global Enquiry screen, by entering the Status of **Prospect**, in the Status search fields:



A list of records will then be displayed:

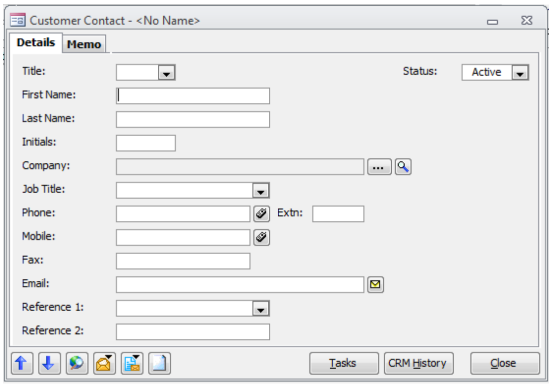


Creating a new Contact:

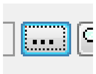
You can create a new contact from…

1. Within the **Customer Record** by selecting **Links > Contacts** and then **Create New**.
2. The Navigation Bar within the Customer Global Enquiry Screen, by selecting the **Customer Contacts** icon to list all Contacts, then **Create New**.
3. Or from the main tool bar at the top by selecting **Sales > Create Customer Contacts** from the toolbar at the top, or open the Customers Global.

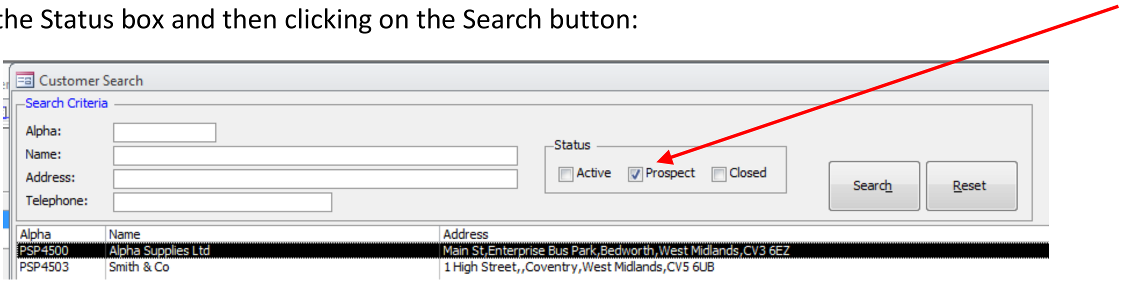
The system will then display the following screen:



1. Complete the fields displayed as required and then use the Company field to link this Contact to the Company they work for. To link this Contact to the Company they work for, click on the Search button:


.

2. Then search for the Customer Prospect record setup earlier. This can be done quickly by selecting the Prospect option in the Status box and then clicking on the Search button:

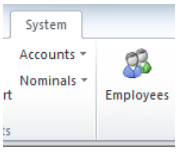


3. Select the Customer required, and the system will return you back to the main Customer Contact screen seen earlier.
4. Complete the remaining fields on the Details tab as required, such as Job Title, Phone No, Email address etc. and then click on Close.

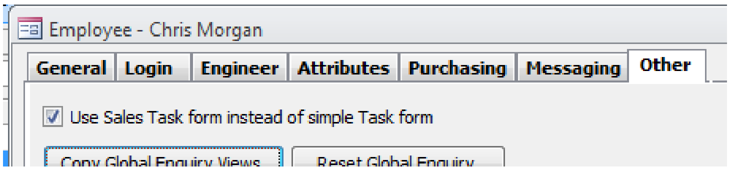
Tasks

When using Tasks on the Protean system, the first thing to decide is which Task form do you want to use. There are two task forms within Protean, the **Standard** Task form, and the **Sales** Task Form (see below).

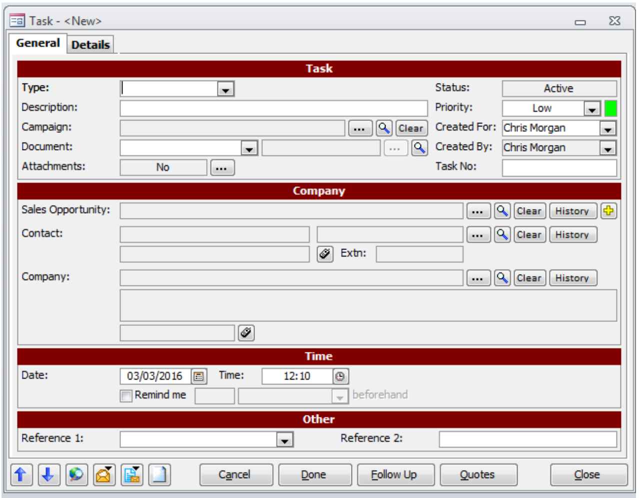
This is determined by your System setting for each individual Employee, by clicking on **System > Employees:**



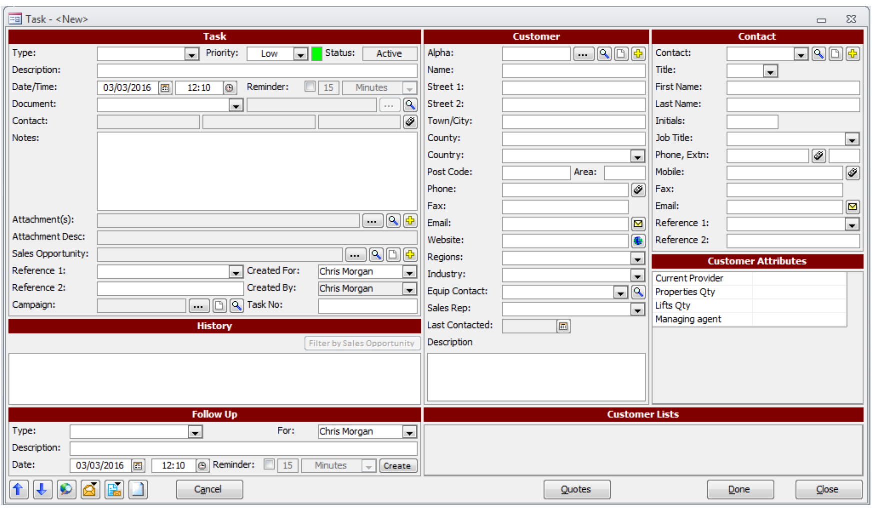
1. Then click on the Other Tab:



2. If you want to use the Simple Task Form, then don't tick the box. This will mean that the user will be presented with the Simple Task screen as shown below:

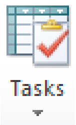


3. If you want the employee to use the Sales Task form, then tick the box. This will mean that the user will be presented with the Sales Task screen as shown below:

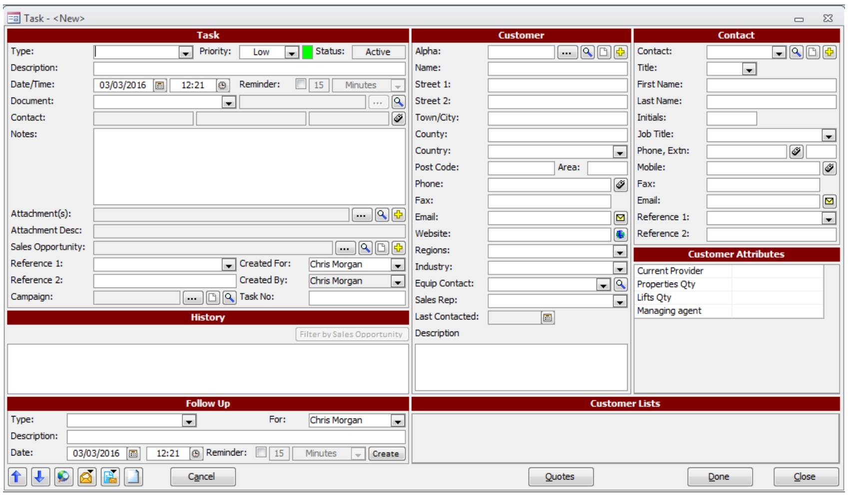


Creating a new Task (using the Sale Task form):

To create a new Task, click on the drop down arrow below the Tasks Icon and select **Create Task**:



The system will then display the appropriate Task screen seen earlier:



The screen is split up into various sections:

<u>**Task Section:**</u>

1. Using the drop down arrow icon, select the type of Task which is required. These are setup in **Settings > CRM > Task Types**.

For example a task type of "Phone call" may be required to contact a customer to chase the payment of an invoice, or you may wish to choose "Reminder" to remind you to order a part for a piece of equipment.

2. If required you can choose a priority from the drop-down list to mark this task as **High**, **Medium** or **Low** priority.
3. Now enter in a **Description** of what task you will need to perform.

For example "Courtesy call to customer".

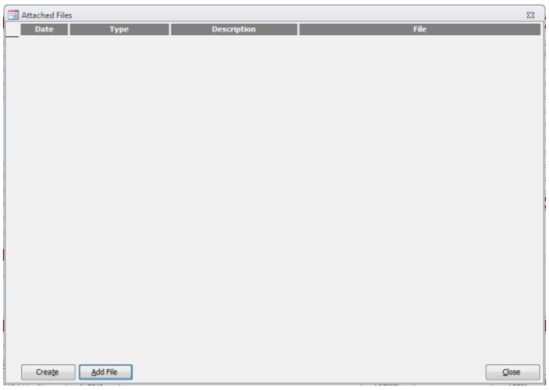
4. If you want Protean to remind you that a task is due, tick the **Reminder** box and enter the time interval at which you would like to be reminded. You can enter how many minutes you want the Pop-Up box to appear on the screen prior to the time you have entered for the task to be completed.

For example if a task was requiring completion at 12pm and 'Remind me' was set at 15 minutes; Protean will show a pop-up box at 11.45am advising you of the forthcoming task which requires an action.

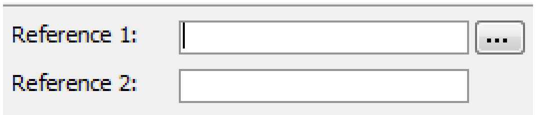
5. You can choose to attach your Task to a Document, using the **Document** drop down arrow.
6. Once selected, you can then use the Search button: ..., to then search for the document required. If this task is not connected to a Document, then leave this field blank.
7. Use the **Notes** box to add any additional notes that may be required.
8. You can use the **Attachment(s)** field to attach any particular documents, files etc that are linked to the Task being created.

For example you may want to add a Quote which needs to be emailed to a customer.

9. To do this, click on the Search button: and the system will display the **Attached Files** screen:



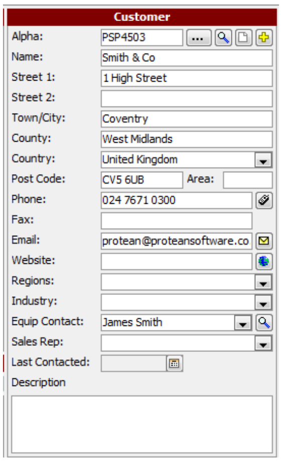
10. Then click on the **Add File** button shown in the bottom left hand corner of the screen: Add File.
11. Search for the File required and then click on the **Open** button. Then click on the **Close** button.
12. This Task can be linked to a **Sales Opportunity** by clicking on the Search button: and the system will display a list of existing Sales Opportunities already created in the system.
13. You can also create a new Sales Opportunity, by clicking on the Create New button: .
14. Up to 2 additional fields of reference can be entered in the **Reference 1** & **Reference 2** fields. The descriptions of these fields can be setup in **System > More > User References** and then selecting **Tasks.** Enter the new descriptions required:



15. Then click on the **Close** button.
16. You can also link this Task to an existing **Sales Campaign**, by clicking on the Search button: .

Customer Section:

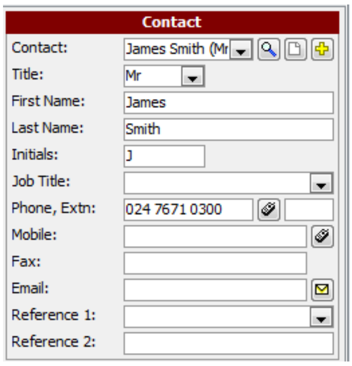
1. Enter the **Alpha Code** of the Customer / Site / Prospect if know, or use the Search button: . Once the required record is selected, the system will display the Customer details and any Contact details if applicable:



In this screen, the details shown can be added, amended as required.

Contact Section:

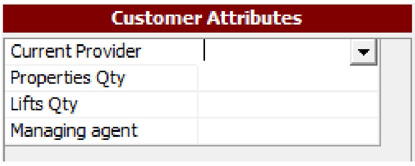
If already attached to the Customer record already selected, details of the Contact will also be displayed:



In this screen, the details shown can be added, amended as required.

Customer Attributes Section:

If Customer Attributes have been setup in **Settings > CRM > Customer Attributes**, they will be listed in this section:



In this screen, the details shown can be added / amended as required.

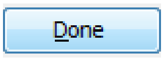
History Section:

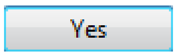
This will display the CRM history of the Customer and will be completed by the system as various Actions / Tasks are completed.

Follow Up Section:

You can use this section to setup a follow up task if required.

Completing a Task:

Once all of the information has been entered, click on the 

button. After clicking on the 

button to confirm that you wish the Task to be marked as Complete, the CRM History is then updated accordingly:

Sales Opportunities

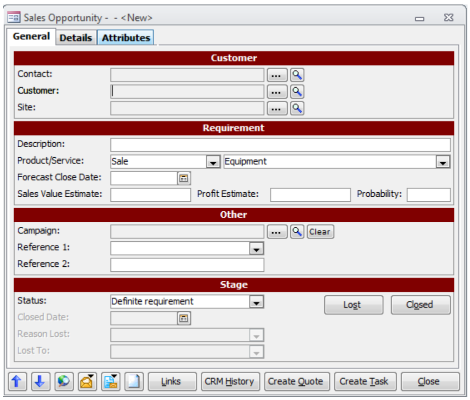
This is when you can set-up a customer as a prospective customer to start – depends on the site as to the way you want to integrate the Customer/Tasks/Sales Opportunity.

You could perform the following routine – Start with a customer entered as a prospect – sending an information pack out would be a task – then maybe adding another task to call them and if they are interested. From there you could set-up a sales opportunity.

Creating a new Sales Opportunity:

To create a new Sales Opportunity, click on the drop down arrow below the **Sales Icon** and select **Create Opportunity**:

The system will then display the Sales Opportunity screen:



<u>**General Tab:**</u>

1. **Contact / Customer / Site:** Choose the contact at this customer, if you select the **Contact** first the system will automatically default to the correct customer and site.

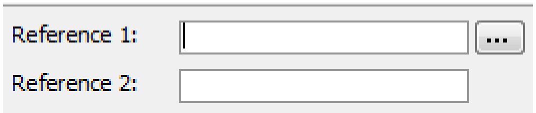
NB: You will not be able to close the **Sales Opportunity** unless a **Contact** has been selected. If the customer has already been set-up as a prospect then you can select the relevant details from the Customer Search Screen by using the Search button: .

NB: When searching for a **Prospective** customer, ensure that the Prospect status tick box is checked. If this is a new prospective customer, then you can set it up here, by clicking the **Create** button.

2. **Description:** Enter a description of the customer’s requirements i.e. Sale of a new truck or a maintenance contract, hire contract and so on.
3. **Product / Service:** Select the type of product/service the customer is interested in, i.e. Hire, Job, Maintenance, Sale. The options available in the second drop down box are determined by the selection made in the previous field.
4. **Forecast Close Date**: When does the salesmen expect the customer to make a decision on this opportunity?
5. **Sales Value Estimate:** Enter the amount (in GBP), of business this opportunity may be worth. This can be used later for analysis purposes.
6. **Profit Value Estimate:** Enter the estimated profit (in GBP), that might be achieved with this sale. This can be used later for analysis purposes.

7. **Probability:** Enter the estimated probability of your Company getting this sale as a percentage. This can be used later for analysis purposes.
8. **Campaign:** Use the Search button: ... to link this Sales Opportunity to an existing Sales Campaign if required. Up to 2 additional fields of reference can be entered in the **Reference 1** & **Reference 2** fields.

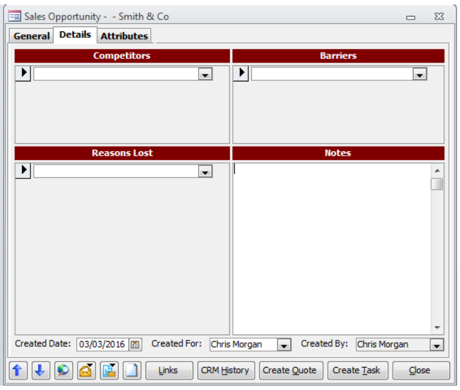
N.B: The descriptions of these fields can be setup in **System > More > User References** and then selecting **Sales Opportunity.** Enter the new descriptions required and then click on the **Close** button:



9. **Status:** Using the drop down arrow in the Status field, select the appropriate status from the list to reflect this Sales Opportunities current position. These can be setup in **Settings > CRM > Sales Opportunity Statuses**.
10. **Lost button:** When this button has been clicked, the status of the Sales Opportunity will change to Lost and the close date field will automatically be completed with the date the button was clicked.
11. **Closed button**: When this button has been clicked, the status of the Sales Opportunity will change to *Closed* and the close date field will automatically be completed with the date the button was clicked.
12. **Closed Date:** This will default to the date that you press the **Lost** or **Closed** button
13. **Reason Lost:** A drop down list of the reasons why the Sales Opportunity was lost, which can be used for reporting purposes. These reasons are set up in **System > General > Cancellation Reasons.**
14. **Lost To:** A drop down list of the competitor who has secured the sale, which can be used for reporting purposes. These are set up in **System > CRM > Competitors**.

<u>Details Tab:</u>

In this screen you can enter additional information regarding the Sales Opportunity.

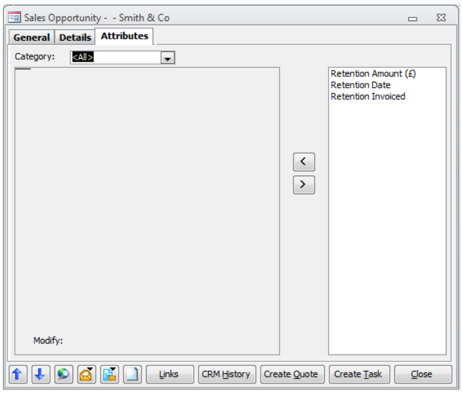


1. **Competitors:** Using the drop down arrow icon, select any Competitors that you may be up against. These are setup in **Settings > CRM > Competitors**.
2. **Barriers:** Using the drop down arrow icon, select any Barriers that you may be up against. These are setup in **Settings > CRM > Sales Barriers**.
3. **Reasons Lost:** Using the drop down arrow icon, select a reason why the Sales Opportunity was lost if required. These are setup in **Settings > More > Cancellation Reasons**.
4. **Notes:** A memo field for general notes on this sales opportunity.
5. **Created For:** Using the drop down arrow icon, select from the list the member of staff (Sales Rep), that this Opportunity is to be assigned to.

Attributes

This tab is used to add additional information regarding the Sales Opportunity, by using pre-set attributes e.g. current supplier, source of lead etc.

These are setup in **Settings > CRM > Sales Opportunity Attributes**:



Buttons

- **Arrow buttons** – moves between Sales Opportunity records
- **View Global Enquiry** – this will bring you into the global enquiry screen for Sales Opportunities
- **Create a Message** - used to create an internal or external message
- **Output a Report** – allows you to Print, View, mail, Export or Fax the standard Sale Opportunity report
- **Create New** – allows you to add a new Sales Opportunity on the system
- **Links** – displays a list of links to other Protean modules
- **CRM History** – displays any CRM history for this Sales Opportunity – i.e. any record of phone calls made, any tasks attached to the Sales Opportunity and so on.
- **Create Quote:** Used to create a quote for this Sales Opportunity. The type of sales screen displayed when this button is clicked depends on which Product/Service has been selected on the General tab e.g. Sale – Equipment will take you into a new equipment sales order, you will then be able to complete the necessary quotation details i.e. – enter in the truck that they were interested in buying.

Find the quote on each of these screens:

1. Job – Charges - Quote
2. Sales – Other Details – Quote
3. Hire – Contract – Quote
4. Maintenance Contract – Contract – Quote

The current Sales Opportunity number will displayed in the **Quote** section on the applicable screen.

- **Date Quoted:** Enter the date.
- **Attached Quote:** this is where you can attach a quote which has been created outside of Protean i.e. as a word or excel document. Click the […] to the right of this field to add, view or remove any attached quotes. When you go back to the Sales Opportunity, it will now show as quoted and you will be able to look at the attachment.
- **Create Task:** this allows you to create a new task related to this Sales Opportunity.

Completing the Sales Opportunity:

Closing the Sales Opportunity will save all of your input.

Quotations:

There are three ways of creating quotes:

1. Via the **create quote** button on the sales opportunity screen.
2. From a third party document using **Attachments.**
3. Using the Word/Protean templates and attachments.

Quote button on Sales Op screen:

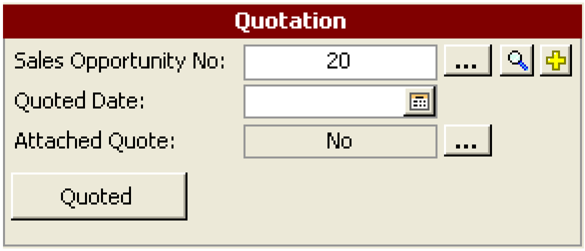
The product/service will determine the quote to be raised, e.g. a Sale will open the sales order with the customer details and type of order. Enter the details and click the **print quote** icon. The quotation field in each type of product/service will display the link to the relevant Sales Op.

Third Party documentation:

If the quotation or other documentation is prepared elsewhere, i.e. Word, Excel or the like then this can be attached to the relevant product/service which is in turn linked to the Sales Opportunity using the **Attached Quote** function.

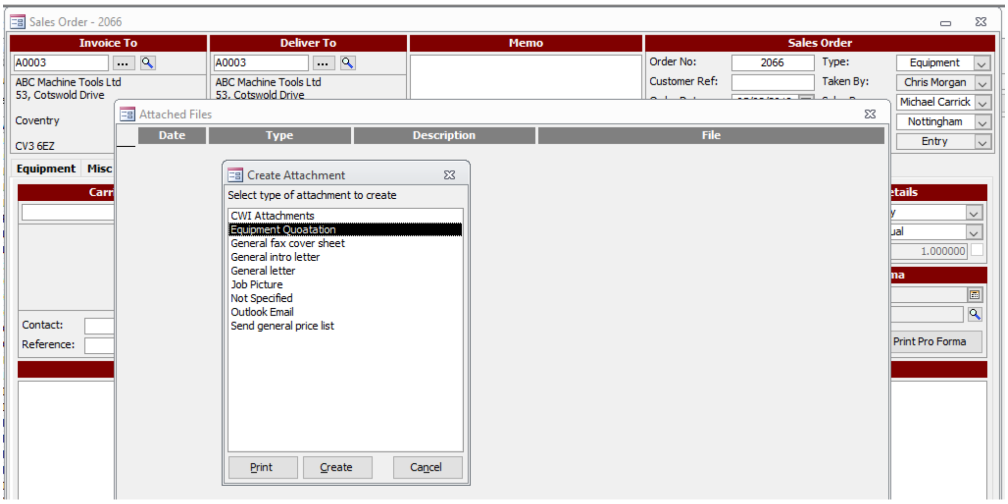
Word/Protean templates:

Create a word document adding in the Protean bookmarks where required (see supplementary sheet) and save as a **template (DOT)** file (e.g. salesquote.dot); ideally a specific folder should be set up for these templates.



Set the path in **System > CRM > Attachment types**, then go to the Sales Opportunity and click Create Quote. On the relevant sales screen, find the **Quotation** section and click [...] next to **Attached Quote**.

Select **Create** and the list of creatable attachments is displayed, click on the relevant template and click **Create**.



All the bookmarked fields will be populated by Protean, make or add any information you require and then **Save As**, the path to the new attachment is then listed in the Attached Files list.

Sales Campaigns

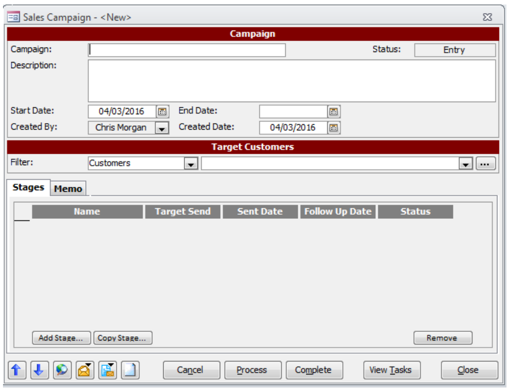
You can use this process to create mailshots & e-shots or simply a list of telephone calls based on user-definable filters running on prospective or existing customers. Follow-Up Tasks can also be automatically created.

Creating a Sales Campaign:

NB: Always Test In Practice Company First

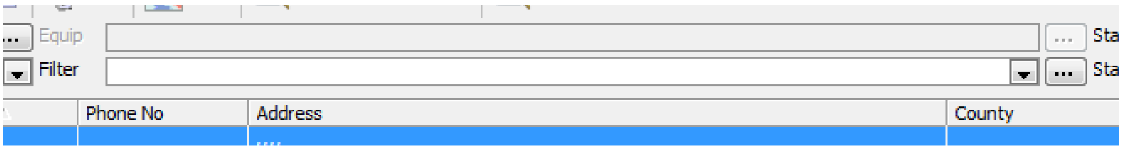
To create a new Sales Campaign, click on the drop down arrow below the **Sales Icon** and select **Create Campaign**:

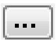
The system will then display the Sales Campaign screen:



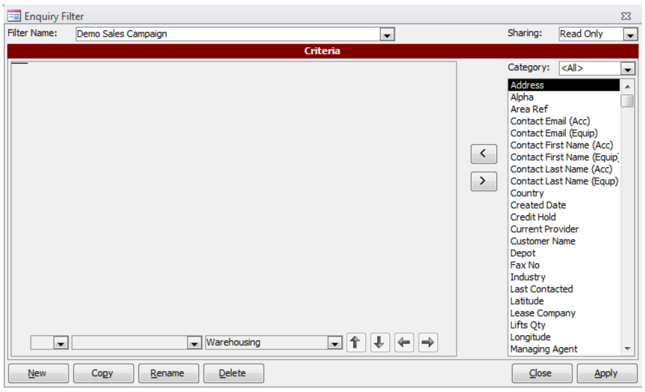
1. Enter a **Campaign name** and **Description**.
2. Enter a **Start date** and **End dat**e (if required e.g. having a discount for a set period).
3. **Created By:** Will default to the user's login name.
4. **Created Date:** Will default to "todays" date.
5. **Filter:** Select the area of the system that the Sales Campaign is for using the drop down arrow icon.

NB: Filters can be setup before creating the Sales Campaign, by using the Filter feature in either the Customer, Equipment, Hire Contracts, Jobs or Maintenance Contract Global Enquiry screens:

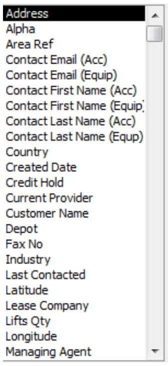


You can use the Search button:  to amend an existing Filter or to create one whilst in this screen.

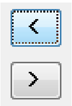
If you create a Filter, the system will display the Enquiry Filter screen:



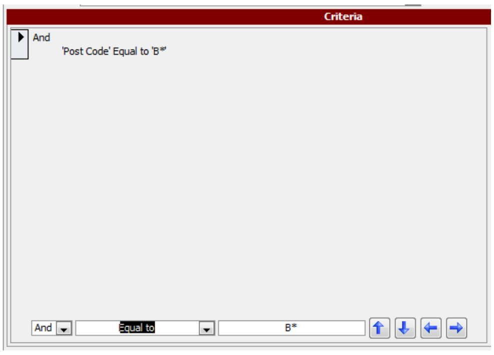
Depending on which area of the system you chose earlier, you then have a selection of various Fields shown on the left hand side of the screen:



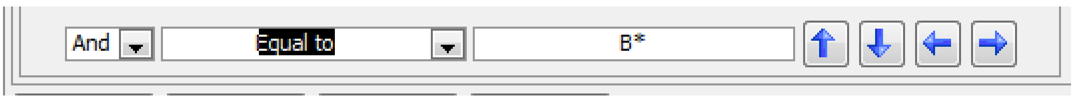
That you can select by high lighting the field and using the 2 arrows to select and un-select as required:



Then select the Field chosen and then apply the condition required:

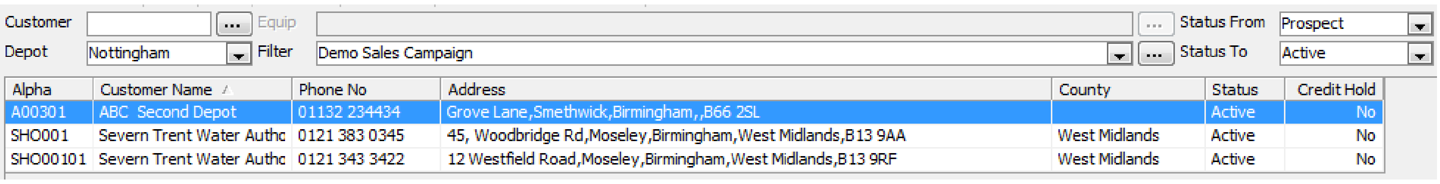


For example: Select the field called Post Code and then use the Condition "Equal to" and then enter the text "B*" will then find all Customers that have a post code beginning with B:



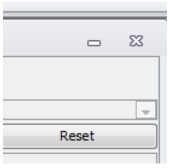
By choosing various fields with various conditions, you can create a defined list of records to be used on the Sales Campaign being setup.

Once the Filter has been setup, click on the Apply button to view the results of applying the condition:



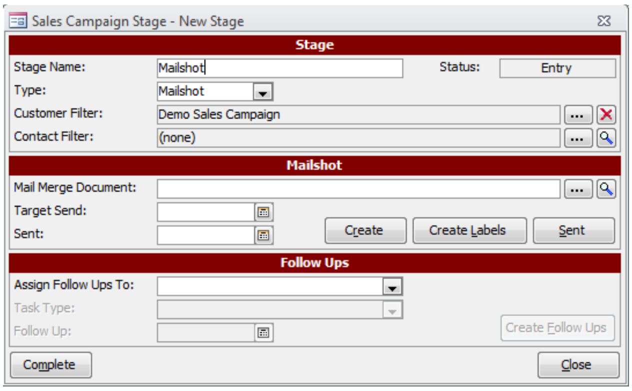
Alpha	Customer Name	Phone No	Address	County	Status	Credit Hold
A00301	ABC Second Depot	01132 234434	Grove Lane,Smethwick,Birmingham,,B66 2SL		Active	No
SHO001	Severn Trent Water Authc	0121 383 0345	45, Woodbridge Rd,Moseley,Birmingham,West Midlands,B13 9AA	West Midlands	Active	No
SHO00101	Severn Trent Water Authc	0121 343 3422	12 Westfield Road,Moseley,Birmingham,West Midlands,B13 9RF	West Midlands	Active	No

If you are happy with the results, simply close the Global Enquiry using the Cross symbol in the top left hand corner:



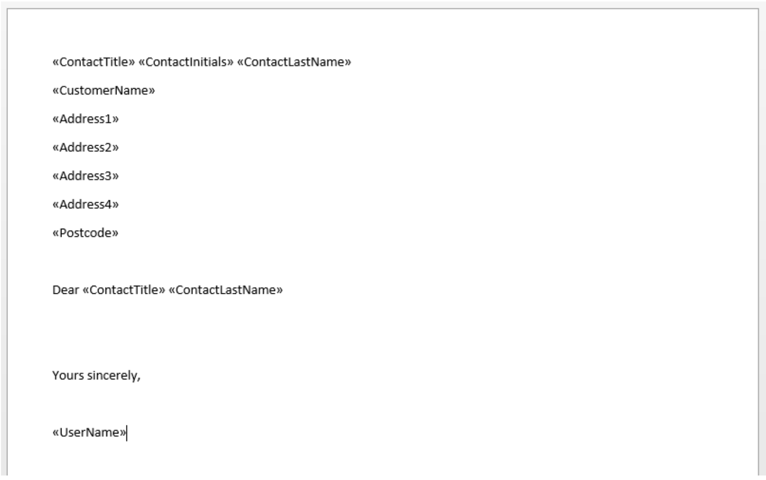
The system will return you back to the Sales Campaign screen seen earlier, with the Filter just setup displayed in the Filter field:

6. Click on the Add Stage... button and the system will display the Sales Campaign Stage screen:



7. **Stage Name:** Enter a name for this stage of the Sales Campaign.
8. **Type:** Use the drop down arrow icon to select the type required.
9. **Mail Merge Document:** Use the Search button: ... to select and browse to the prepared document OR leave blank.
10. Click on the Create button to create the merged document (this will take you to Microsoft Word). A message will be displayed if you used a pre-prepared template document 'the document already exits', click YES to continue.

11. The system will then open up Microsoft Word with some pre-loaded Merge fields:

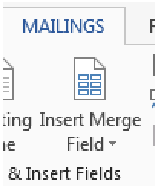

«ContactTitle» «ContactInitials» «ContactLastName»
«CustomerName»
«Address1»
«Address2»
«Address3»
«Address4»
«Postcode»

Dear «ContactTitle» «ContactLastName»

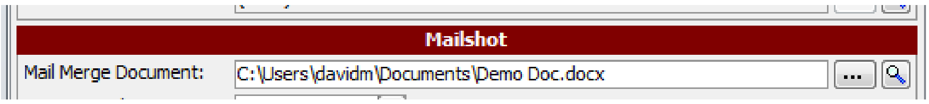
Yours sincerely,

«UserName»

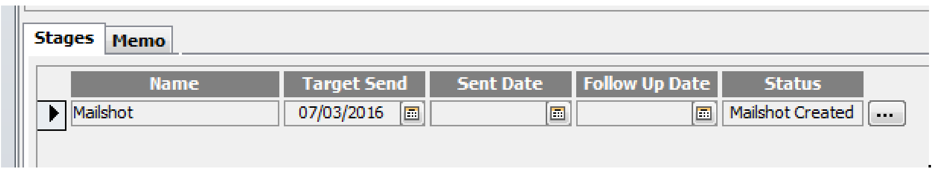
12. Amend the layout of the document and insert additional merge fields if required, using the Insert Merge fields icon:



13. Enter the main body of text required on the mailshot as required.
14. Once completed, **Save** the merged document.
15. The system will then return you to the Sales Campaign Stage screen with the Mail Merge Document just setup as shown below:

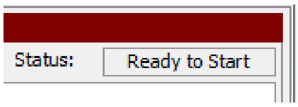


16. **Target Send**: Enter the date on which you plan to send the mail shot/campaign.
17. Then click on the Close button to close the stage.
18. The system will then return you back to the main Sales Campaign screen seen earlier, displaying the Stage just setup:

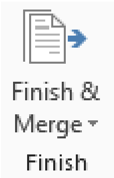


Name	Target Send	Sent Date	Follow Up Date	Status
Mailshot	07/03/2016			Mailshot Created

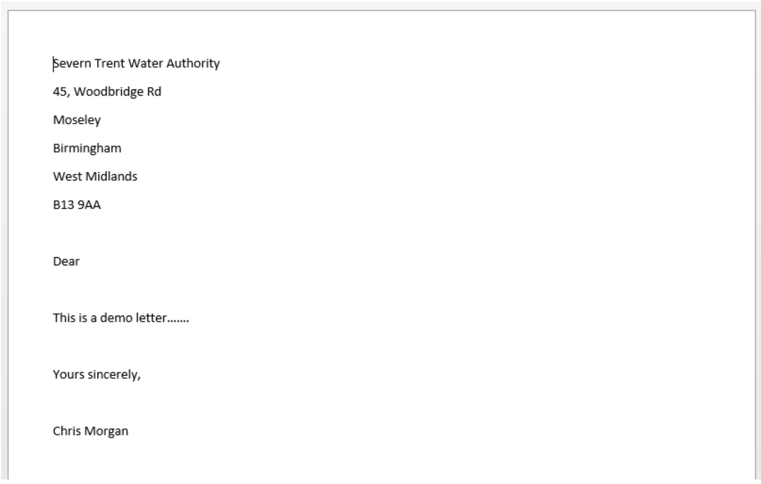
19. Click on the Process button to start the campaign.
20. The message ‘Process Campaign, are you sure?’ will be displayed, click YES. The status of the campaign will now be “Ready to Start”:



21. Access the Mail Merge document created earlier and use the Finish & Merge icon:



22. To merge the filtered list created earlier, with the document:



Severn Trent Water Authority
45, Woodbridge Rd
Moseley
Birmingham
West Midlands
B13 9AA

Dear

This is a demo letter……

Yours sincerely,

Chris Morgan

23. Produce the documents as required in the standard way.
24. Once the documents have been created, click the  button when the document has been sent, a link to the document will appear in each of the customers CRM history and the Sent field will have a date entered into it.
25. View tasks - based on system setting (as set up per point 1 above) - this determines what task are created following the mailshot.

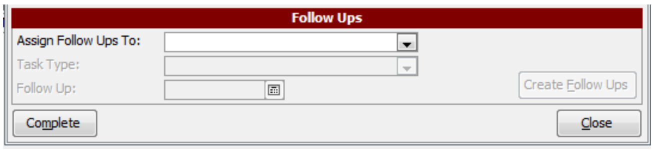
***NB:* For labels,** select **Create Labels** in Protean, then create as you would normally in word by selecting the required label format, then clicking on the **Propagate Labels** button before using the **<<abc>>** button to create the name and address data.

In order for your contact names to be pulled through on the mailshot document, ensure that the "Equipment Contact" field on the customer screen is filled in with the main contact name.

If you are using protean via terminal services you will need to ensure that your hardware manager has set you up with sufficient access rights to access word through your TS session.

Follow Up Section:

Once a Mailshot has been sent, Protean allows you to create follow up tasks from the Stage:



1. **Assign Follow Ups To:** Select the Sales Rep to assign the follow up tasks to, or if more than one Sales Rep will be dealing with follow ups, create a group in **System > CRM > Sales Groups**, then select the group from the drop down list.
2. **Task Type:** The type of follow up task to be created.
3. **Follow Up:** The date that the follow up task will be due when created.

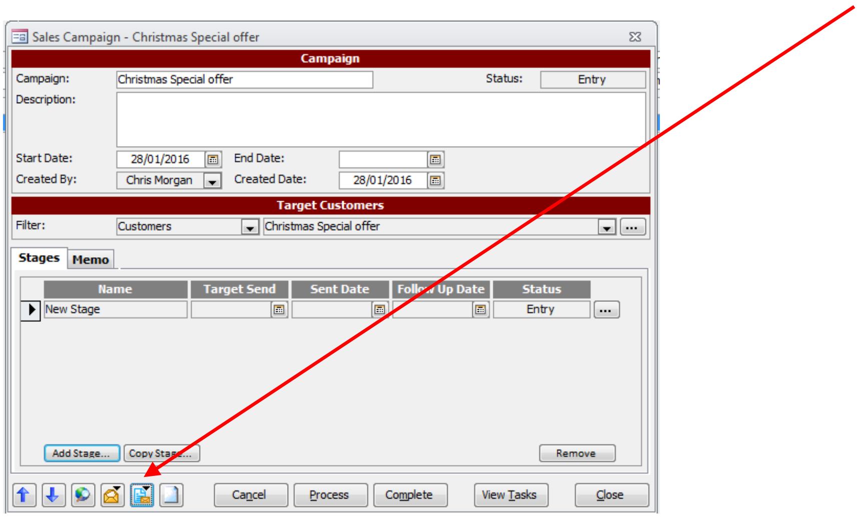
When these details have been entered, click **Create Follow Ups**. A stage will automatically be completed when all follow up tasks have been completed.

If no follow ups have been created, you can close the stage using the "**Complete**" button. Where follow ups have been created, if you click the **Complete** button, you will be asked if outstanding follow up tasks should be cancelled.

Back on the main **Sales Campaign** screen you can use the "**Complete"** button to complete the campaign, once all stages have been completed and the **View Tasks** button to display all of the follow up tasks related to this Sales Campaign.

Sales Campaign Reports:

Two standard **Sales Campaign** reports can be accessed from the **Output a Report** button on the **Sales Campaign** screen:

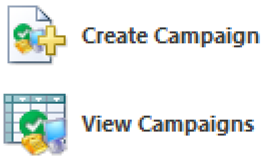


The reports are:

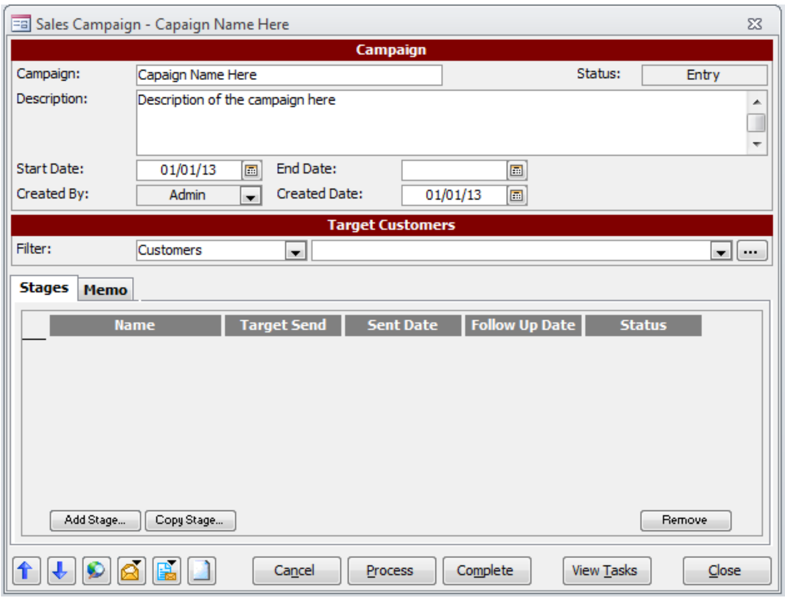
1. Sales Campaign Progress
2. Sales Campaign Effectiveness – Summary.

E-Mailshots

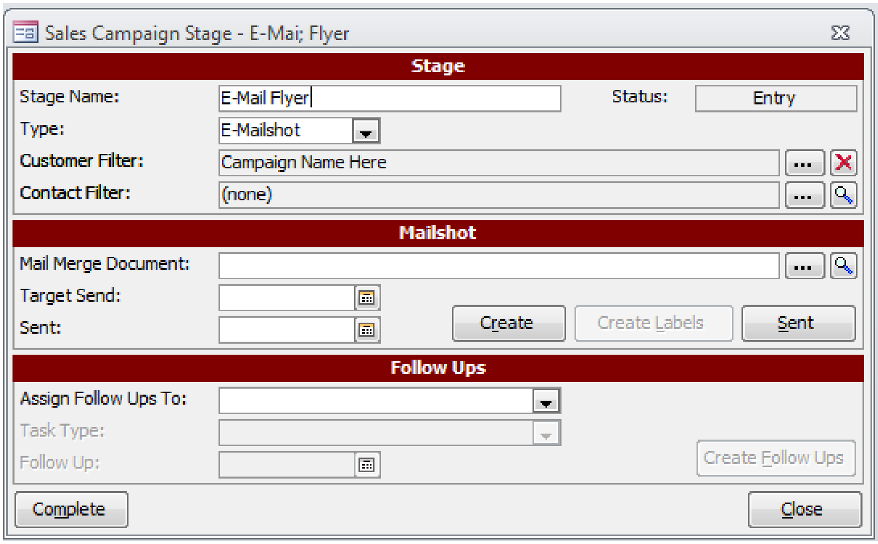
In order to create an e-mail mail shot you will first need to create a Sales Campaign; this can be done by clicking on the menu under Sales and then selecting 'Create Sales Campaign'.



You are then presented with the Sales Campaign window; add a title and description for the campaign.



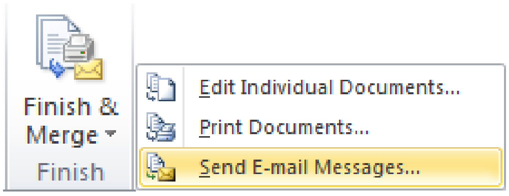
1. You must now create a filter by clicking the '…' button in the Target Customers section; alternatively you can select a filter that has been created earlier.
2. For further information on setting up filters, please see **Global Enquiry - User-Defined Filters** in the help section on Protean.
3. Once you have created the filter click 'Add stage…'

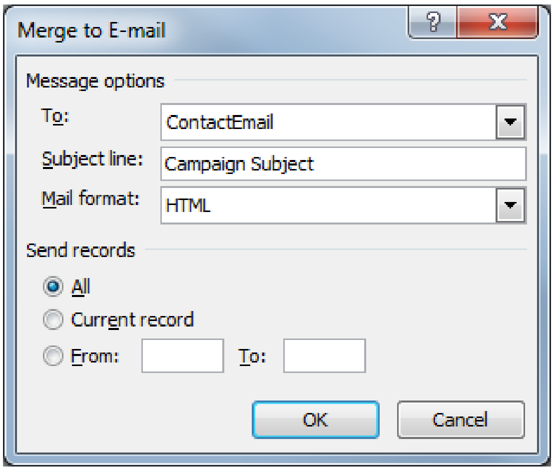


4. Type in a 'Stage Name' and ensure the 'Type' is set to 'E-Mailshot'.
5. Now click on the '…' next to the contact filter and select the 'Job Types' of the contact you want to send the message to, then click on the magnifying glass. This will show you all of the contacts that the e-mailshot will be sent to.
6. **Note: The results of the filter must have an e-mail address or you will not be able to proceed at the later stages**
7. Now click 'Create' under the 'Mailshot' section.

Mail Merge Document

A word document will now appear where you can edit the contents of the e-mailshot, once you are happy with the layout and content you should click 'Send E-mail Messages…' under the 'Finish & Merge' menu.



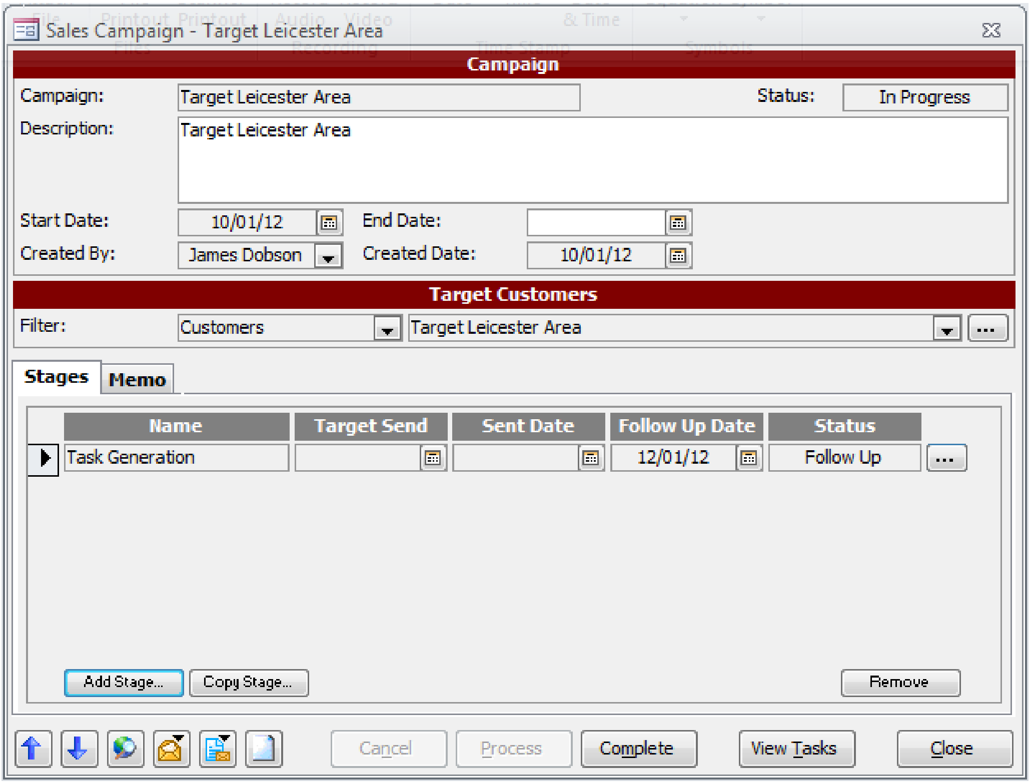


It is important that you set the 'To' box to 'Contact Email' and ensure the 'Mail format' is set to 'HTML', if you prefer the email to be sent as an attachment set the 'Mail format' to 'Attachment'. To complete the process you should click 'OK'.

**Note: The emails will be sent using your Outlook email client. **

Sales Campaigns Procedure (Creating Tasks only)

We recommend you run through this in the practice company first.

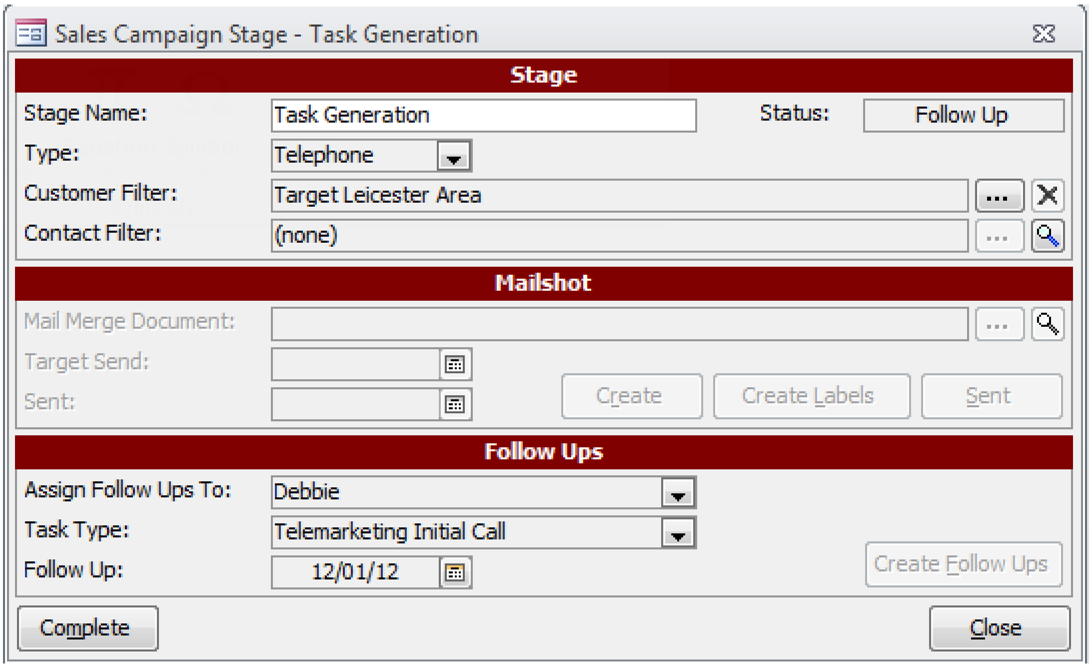


1. Go to the **Sales** menu and select **Create Campaign.**
2. Enter a **Campaign name** and **Description.**
3. Enter a **Start date** and end date (if required e.g.: having a discount for a set period).
4. **Created by** - will default to the user's login name.
5. **Select filter for campaign** OR amend the filter using the **[...]** button.

   Adjust filter (for a full list ensure the filter is set to include all statuses).

   Apply, then **Close** list **–** the filter will automatically be saved in the campaign.

6. Click **ADD STAGE** – then enter a stage name.



7. Select type **Telephone.**

8. Go to **Follow-ups section.**

9. In **Assign Follow-ups To** enter the name of the person or group that you want to receive the Tasks.

10. Enter type of Task you want the system to create in **Task Types**.

11. In **Follow Up** enter the due date for the Tasks that will be created.

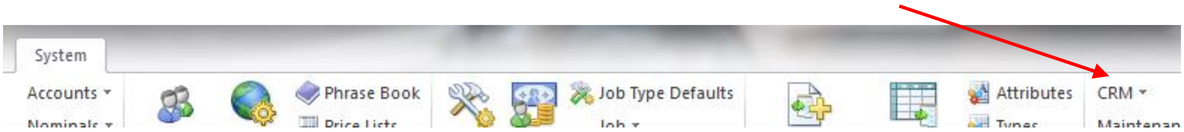
12. You will need to close the Stage before you can click the **Create Follow Ups** button.

    On the main Sales Campaign screen click **Process** to make the Campaign active. You will now be able to go back into the Stage and click **Create Follow Ups.**

13. Click on **View Tasks** to view the Tasks generated by the Campaign.

CRM Setup

In order to use the Protean CRM system, a number of pre - determined settings and lists must be setup. This is done, by clicking on the **System tab** and then selecting the various options in the **CRM** section:



1. Attachment Types: This allows you to set up pre-formatted templates for creating letters, quotes & other documents in the CRM system.

2. Competitors: Used to setup a list of Competitors that are used on Sales Opportunities, to allow you to allocate known competition on potential sales deals. This can be useful for reporting purposes.

3. Job Titles: Allows you to maintain the list of Job Titles available when creating Customer & Supplier Contacts.

4. Sales Barriers: Reasons and/or difficulties that could prevent successful completion of the sales opportunity.

Examples:

- Brand Resistance
- Price
- Supplier loyalty
- Prospect finance
- Technical fit

5. Task Types: User defined list of the types of tasks to be carried out. Generally sales related, but tasks can also be set as reminders for other areas of the system, including internal.

Examples:

- Canvass call
- Internal reminder
- Presentation
- Quote
- Sales call
- Send information
- Send specific letter
- Visit.

6. Customer Attributes: Any relevant info the users may wish to analyse the prospective customers by.

Examples:

- Current supplier (List type).
- Next Fleet Renewal (Date type).
- Maintenance Contract Renewal (Date type).
- Number of Trucks (Numerical field).

7. Sales Opportunity Attributes: Information that the user requires to further analyse prospective customers and/or sales opportunities. Listed below are some of the benefits of using attributes:

- **Information Storage:** Attributes allow you to store information about a Sales Opportunity. They are completely user-defined, allowing you to hold as much or as little information as you wish. Each Attribute can also be Categorised (again using user-defined Categories) to enable you to control long lists of information.

- **Printing & Reporting:** Attributes can be printed on CRM Reports, or any report in Protean that refers to Sales Opportunities.

- **Searching:** Using the **Advanced Query** option in the **Global Enquiry screen,** you can also search on Attributes.

8. Sales Opportunity Statuses: Indicates what status the opportunity is at, these are user definable and the sequence can also be defined. Please note that 3 statuses are pre-set and cannot be re-sequenced: Cancelled (always 1st); Lost and Closed (always the last two in the list).

Examples:

- (Cancelled)
- Short-listed with known competition
- Indicator of preferred supplier.
- Secured formal recommendation.
- Definite requirement.
- Submitted for capital approval.
- Verbal confirmation order to be placed.
- Requirement Confirmed
- Demo Arranged
- Sent Quote
- Short listed
- Decision Expected
- Verbal Order
- Written Order
- (Lost)
- (Closed)

In this way via Global Enquiry and CRM Reports you can track potential sales through from first contact to closure, in as detailed or generalised way as you wish.

CRM Reports

Protean has the following standard reports available: