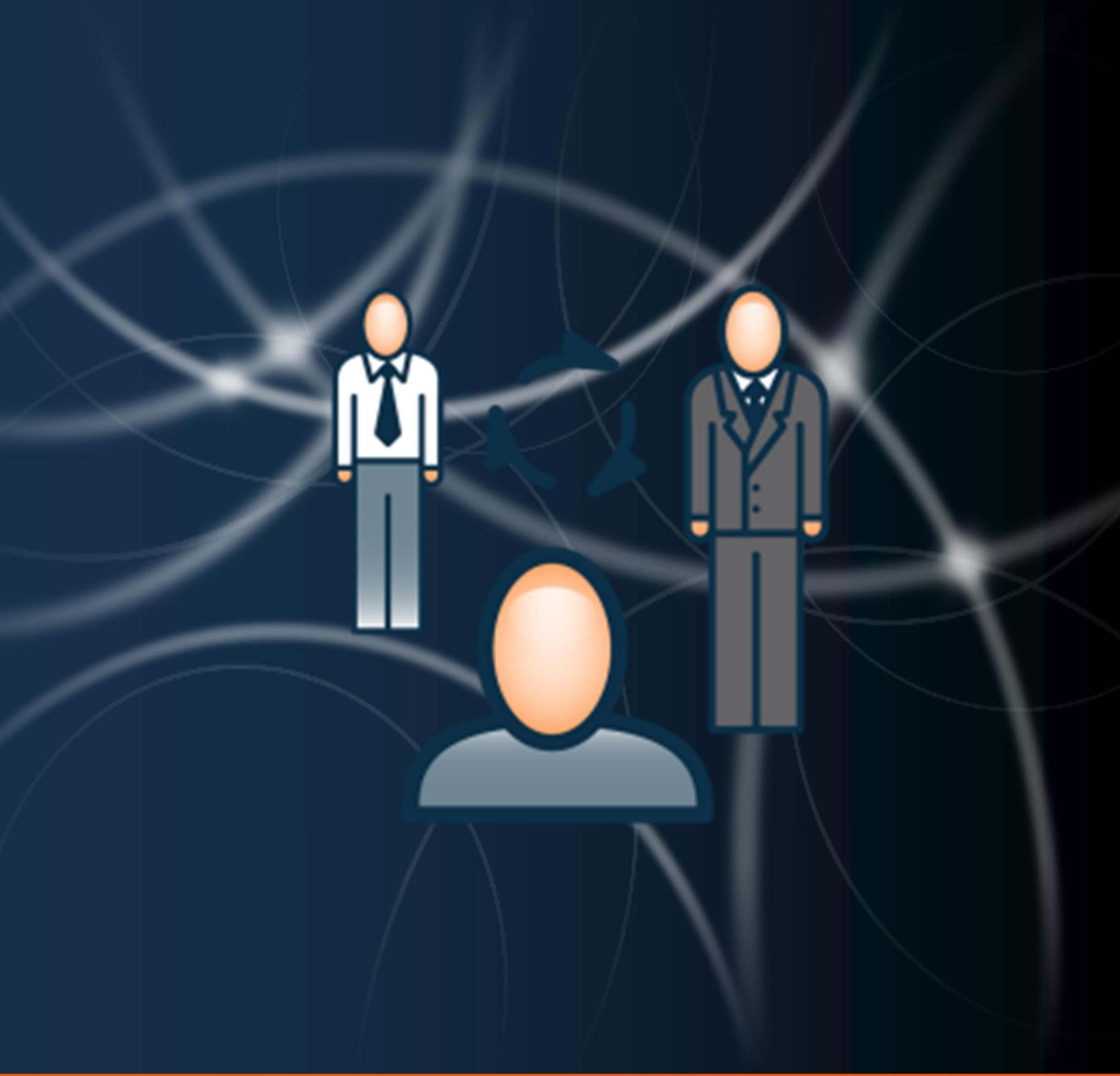

CRM

User Manual

The instructions in this manual are for informational purposes only and are subject to change. Protonic Software GmbH assumes no liability. The software described in this manual requires a license.

The individual functions are described using screenshots. Depending on your easyjob license, operating system or Office version, the functions and screenshots you have in your environment may differ from this manual or may only be available in later versions.

Manual Version June 2018

Documentation based on easyjob® Version eng 6.8.2.74

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Germany

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INTRODUCTION

Information about the structure and content of this document can be found here.

Important notice

This manual will help you get started with the easyjob 6 rental software CRM module.

The development of the easyjob rental software as well as the documentation has been done with great care. The individual program functions are constantly checked through our Quality Assurance Process. However, errors can still occur.

Main Office

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http://www.protonic-software.com

Support

You can find more information about the support options on-line at http://www.protonic-software.com/en/easyjob/corporate/support/.

In addition, there is a support forum where you can exchange information with other users. The support forum can be found at http://forum.protonic-software.com

Training

We offer customized training programs for the following extensive topics.

To learn more, please visit our website at

http://www.protonic-software.com/en/service/training/ and our sales office at

sales@protonic-software.com.

About this manual

The individual functions are described using screenshots of easyjob license 6. Depending on your easyjob license, the forms you have in your environment may differ from the screenshots shown in the manual.

How to use this manual

This document uses the following standards

Functions that require a license

Individual program functions are made available in your easyjob environment based on your license. This may concern individual program functions or entire modules.

Functions that are only available in individual modules are marked with minimum-edition symbols **S**, **M**, **L** or **XL**. Some functions are limited in easyjob S. There is no indication of this. You can find the limitations in the version comparison matrix on our website.

Functions that are only available by subscription are marked with the symbol .

For example:

L	The function is only available in easyjob L and easyjob XL
L	The function is only available in easyjob L and XL with a current subscription.

easyjob-specific terms

In order to make a description better understood, in some cases easyjob-specific terms are highlighted with a color.

For example: with the Project and Job groups, you also have the possibility to select a Template.

Work steps, buttons, actions and menu paths

Individual work steps, actions, menu paths or clicks are separated from each other or initiated by the symbol "".

Buttons, menus, tabs, etc. used in context are highlighted in color.

Example 1: Check the box in the Activating the List Editor field.

Example 2: easyjob Menu View Monthly Overview

Example 3: Help

Example 4: Ok

Reference to other chapters

References to other chapters and sections are underlined and displayed in orange.

Example: See section Important information.

Important information

Important information is highlighted in orange and presented with a light bulb.

Example:

This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important.

Special keys

Special keys are represented with the following symbols:

	Windows key
Tab	Tabulator key
↓ ← → ↑	Arrow keys
	Return key
	Context Menu key
Esc	Escape key
F1	Function key 1
Ctrl + A	Control key. Keep the control key pressed down and press the A button.
Alt + H	Alt key. Keep the Alt key pressed down and also press the H button
Del	Delete key

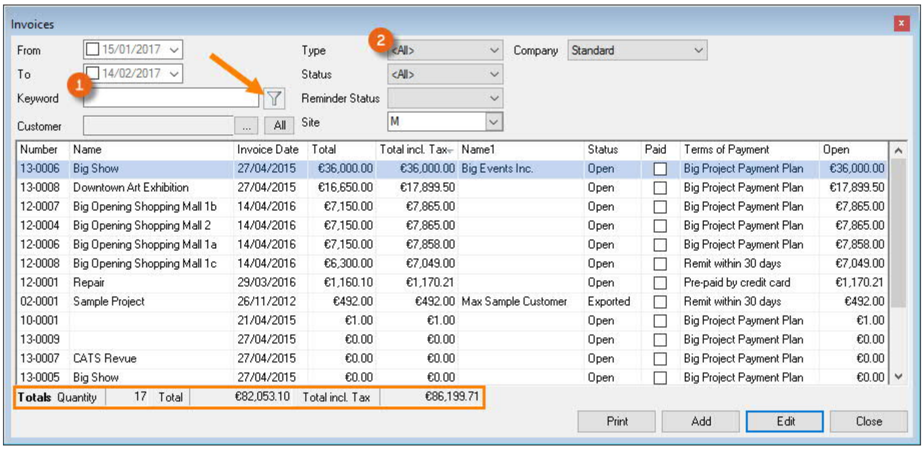
Phrasing

In this manual and in the easyjob examples, terms such as employee, assistant, technician or carpenter are used both for men and for women.

Screenshot explanations

The screenshots will be explained using numbers ① ② ③ and arrows ➡ marked.

Screenshot highlights will be marked with orange frames.



Additional documentation

In order to make it easier to become acquainted with and consult the easyjob documentation, we have divided it into multiple sections.

You can find an overview of all documentation on the following website.

http://www.protonic-software.com/en/service/downloads/

CRM

The easyjob Customer Relationship Management CRM helps you optimally manage and document your customer relationships.

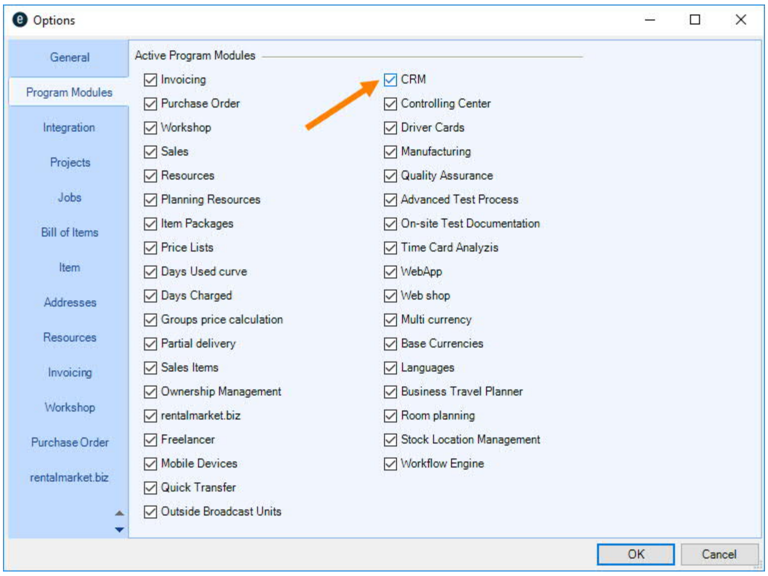
The easyjob CRM (Customer Relationship Management CRM) module helps you optimize your communication with customers, partners and suppliers. You can directly address your customers with activities, campaigns and marketing lists. With the CRM Dashboard, you can provide your Sales Team with a wide range of information and data in order to recognize sales potential and improve customer loyalty.

Installation and activation

Go to the easyjob program settings to activate the easyjob CRM module: A separate installation is not required.

Activating the CRM module:

1. easyjob Menu ⇨ Tools ⇨ Settings
2. ⇨ Programm Modules tab
3. Select CRM



4. ⇨ Ok

easyjob must be restarted to activate the settings.

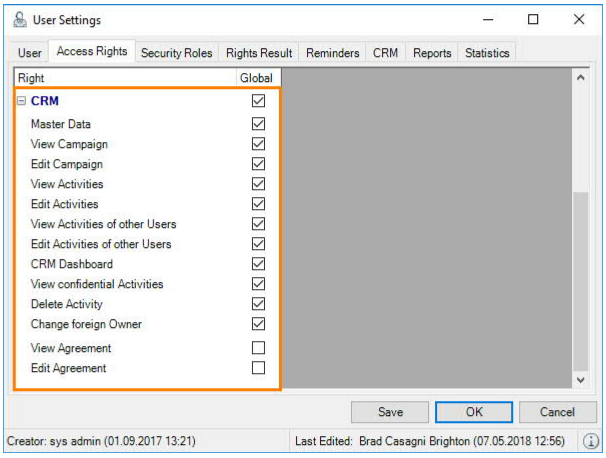
Configuration and settings

User settings

There are various rights available for the CRM module in the User Rights Manager.

Assigning the user rights for CRM:

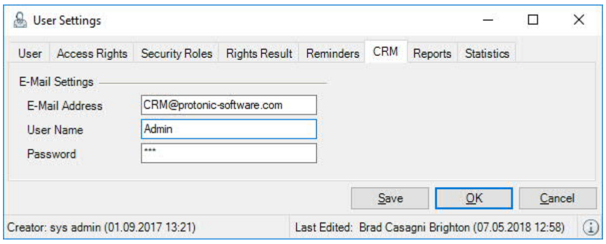
1. easyjob Menu → Tools → Manage Users
2. → Select a User
3. → Edit
4. → Access Rights tab
5. → General
6. Assign the desired rights (e.g. view confidential activities or agreements, etc.)



7. → Save
8. → Ok

User email addresses

In the user settings, you can define a specific email address as well as the user-related SMTP access data for each user. All outgoing emails will be sent within the context of the user. If emails should be sent with a global email context, keep the email address open.



Setting up the e-mail address for a user:

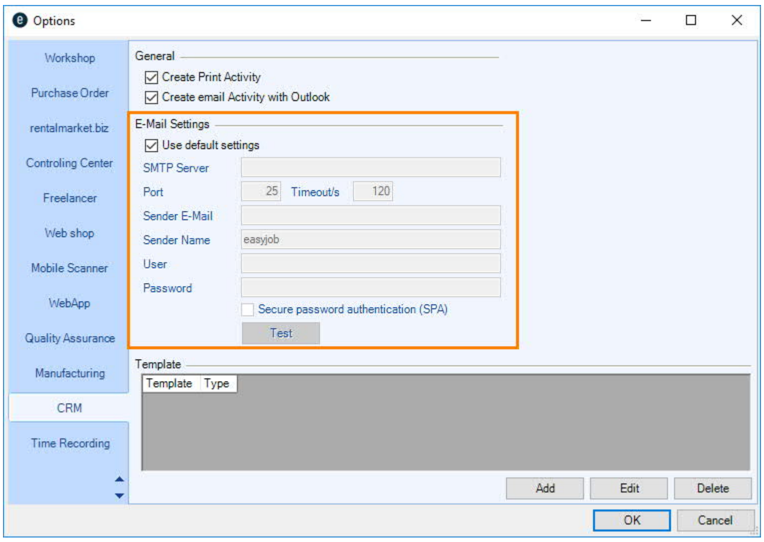
1. easyjob Menu ↪• Tools ↪• Manage Users
2. ↪• Select a user ↪• Edit
3. ↪• CRM tab
4. Enter the e-mail settings
5. ↪• Save
6. ↪• Ok

SMTP email settings

easyjob sends all email messages directly via SMTP. No additional email program is necessary. Simply configure your email parameters in the easyjob program settings.

Defining the email settings:

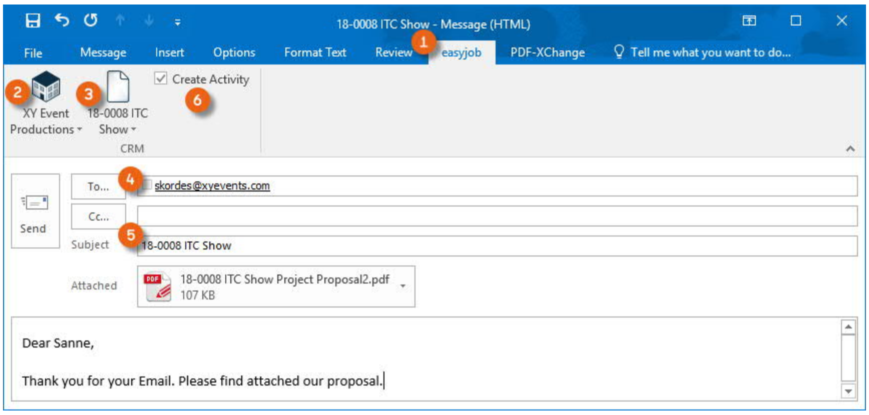
1. easyjob Menu ↪• Tools ↪• Settings
2. ↪• CRM tab
3. Enter the corresponding data under email settings
4. Use Test to test the account settings.
5. ↪• Ok



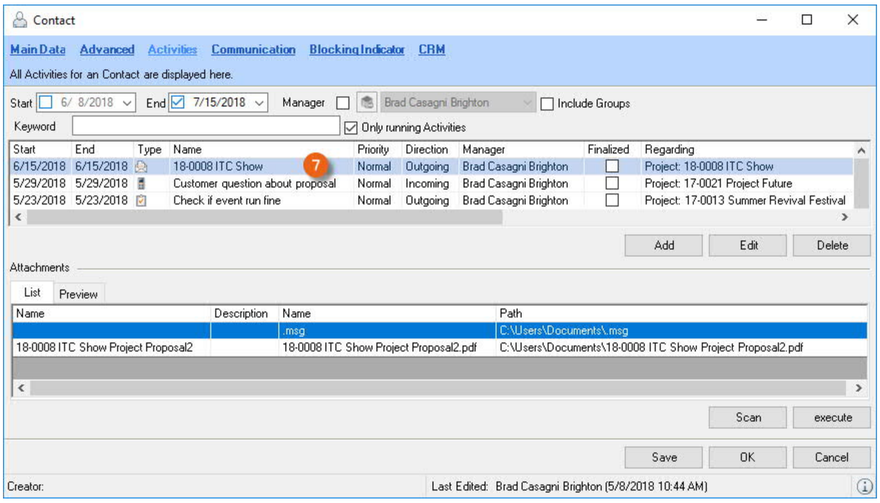
easyjob must be restarted to activate the settings.

Email activities using Outlook

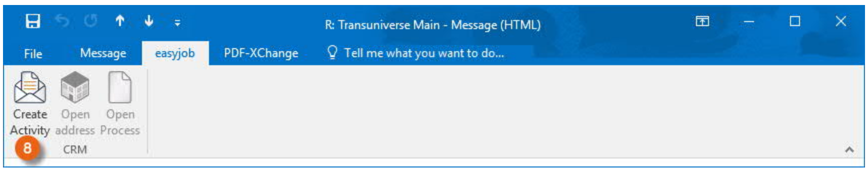
You can use the CRM email toolbar to create various email activities directly via Outlook. When creating a new email, you can assign Addresses ② and Processes ③ (see also Activities in the reference type) from easyjob on the easyjob tab ①. The selected email address and the name of the workshop activity are automatically entered in the Recipient ④ and Subject line ⑤.



The emails are automatically assigned to the activities of the respective Processes ⑦, if Create Activity ⑥ is activated.

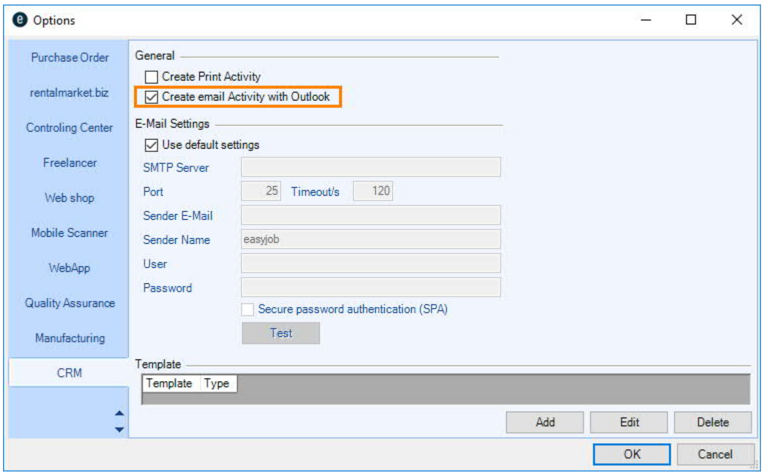


When you receive an email, you can create a new Activity ⑧ from it directly.



Setting up the CRM email tool:

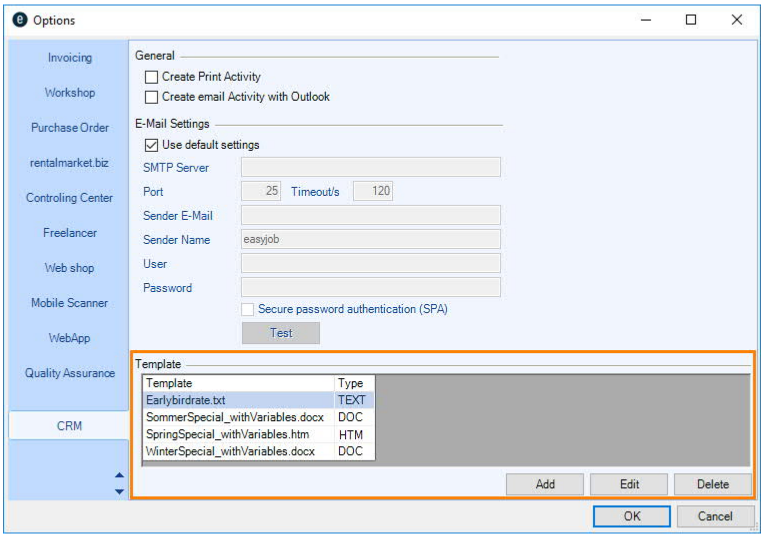
1. easyjob Menu ➜ Tools ➜ Settings
2. ➜ CRM tab
3. Check the box Create email Activity with Outlook
4. ➜ Ok



easyjob must be restarted to activate the settings.

Templates

With the help of templates, you can initialize Document and Email activities. First create a Word document, assign a name to it, enter the desired content and then save it. You can use DOC or D files for the document type. Email templates are saved in HTM format (TXT format for Outlook).



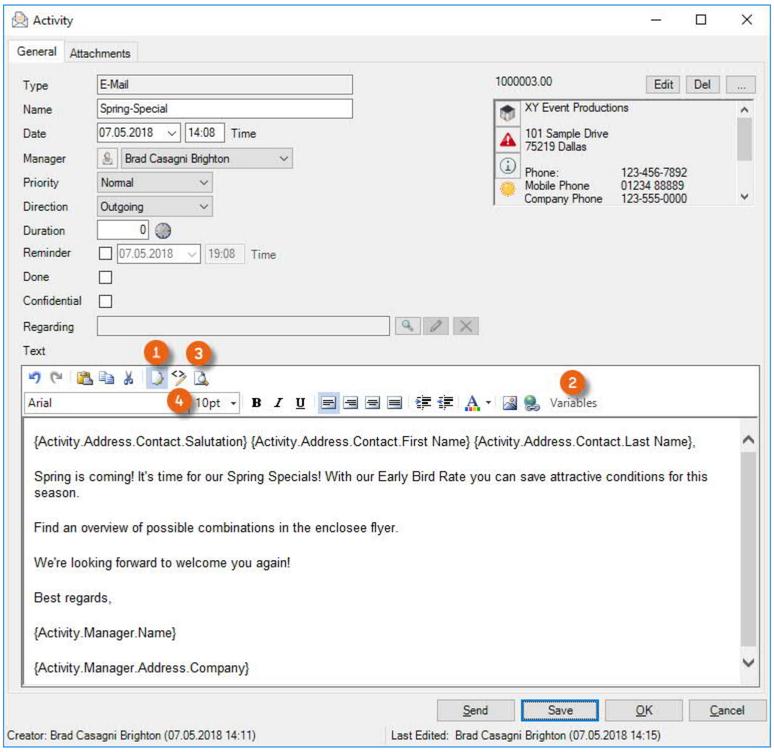
Defining the templates:

1. easyjob Menu ➜ Tools ➜ Settings
2. ➜ CRM tab
3. ➜ Add
4. ➜ Select the template
5. ➜ Ok

easyjob must be restarted to activate the settings.

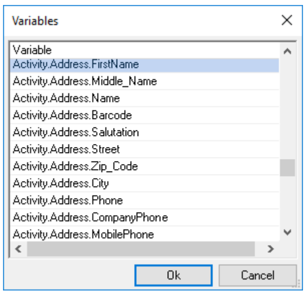
Variables

In CRM, there are many variables that you can integrated into your templates for documents and emails. When performing the activity, the variables used will be replaced with the respective data that was created in the activity (e.g. name, address). The selection of the variables ② can be found in Design mode ① of the activity email ②. With Preview ③ you can check your entries. You can copy the created content to a Word document and manage the layout as you prefer. If your want to prepare an email template, we recommend after creating the Source text ④ to save it in HTM or TXT format.



Creating a template with Variables for documents/emails

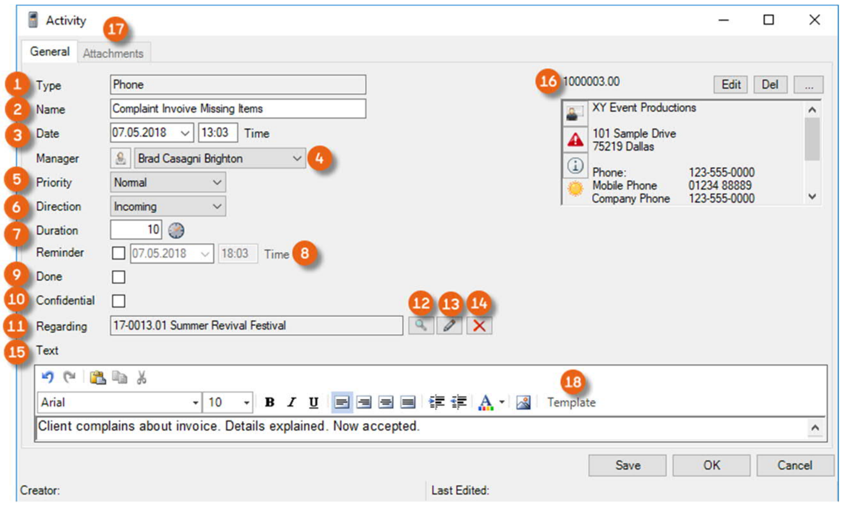
1. easyjob Menu ⇨ CRM ⇨ Activities
2. ⇨ Add
3. ⇨ Email type
4. ⇨ Ok
5. ⇨ Variables
6. Select the desired Variables



7. ⇨ Ok
8. Manage the content as you prefer

Activities

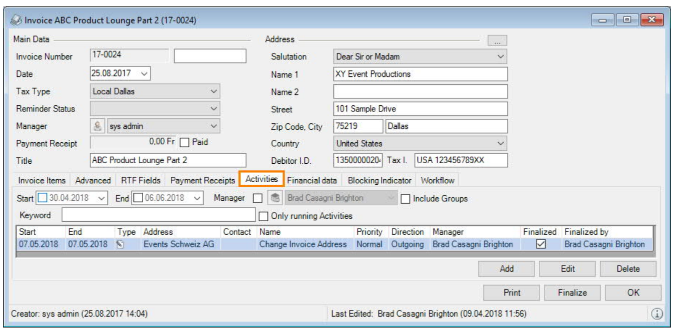
Activities document all types of correspondence inside and outside your company. When creating an Activity ①, select the type. (e.g. task, phone or appointment). More information can be found in the Activity Type section. You can enter a wide range of details for every activity and filter them as required (see Activity overview) or analyze them using the easyjob Business Information Center.



Enter the Name ②, Date and Time ③, the Manager who created and documented the process ④ (this can be changed if you want to assign the Activity to a colleague, see also CRM Owner. You can also assign activities to a User Group, assign the Priority ⑤ (high - normal - low), the Direction ⑥ (incoming - outgoing), the Duration ⑦, a Reminder ⑧ (date - time), mark the activity as Done ⑨, as Confidential ⑩ (see also User settings), select a process regarding this activity ⑪, add a text ⑮ and attachments ⑰. You can create RTF Templates for Activities. More info can be found in easyjob 6 manual.

Each activity refers to an Address ⑯. When you create a new activity, you must select an Address in order to save the activity.

The process to which the activity refers is called the Reference Type. This means, for example, an Address, a Project, a Rental Job, an Invoice, a Purchase Order, a Sales Job, an Item or a Workshop Activity. You can use the magnifying glass ⑫ to open the Reference Type selection, and at the end you can select the related process, edit existing ones ⑬ or delete them ⑭. By selecting the Reference Type, (e.g. invoice) and the related Process (e.g. project name) Activities are automatically assigned to the selected invoice.

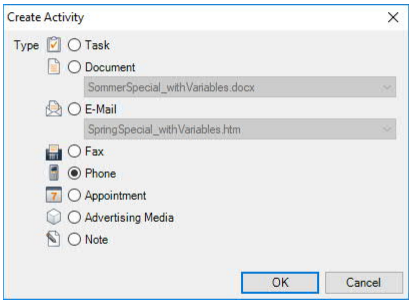


Creating activities

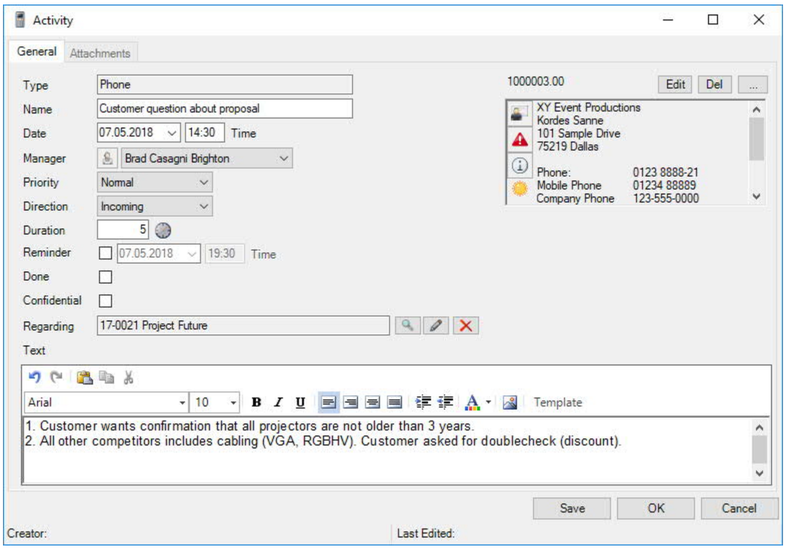
The process for creating activities is identical in all areas.

Creating activities, e.g. in a project:

1. easyjob Menu → Projects → Edit Project
2. Select a project
3. → Ok
4. → Activities tab
5. → Add



6. Select the type of activity
7. → Ok
8. Enter all the information about the activity



9. → Ok

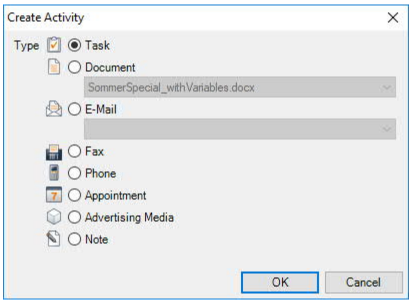
Creating activities from the easyjob Menu:

1. easyjob Menu → CRM → Activities
2. → Add

You can add additional documents to an activity. Select the Document tab and click Add. More information can be found in the easyjob 6 user manual in the Document Management chapter.

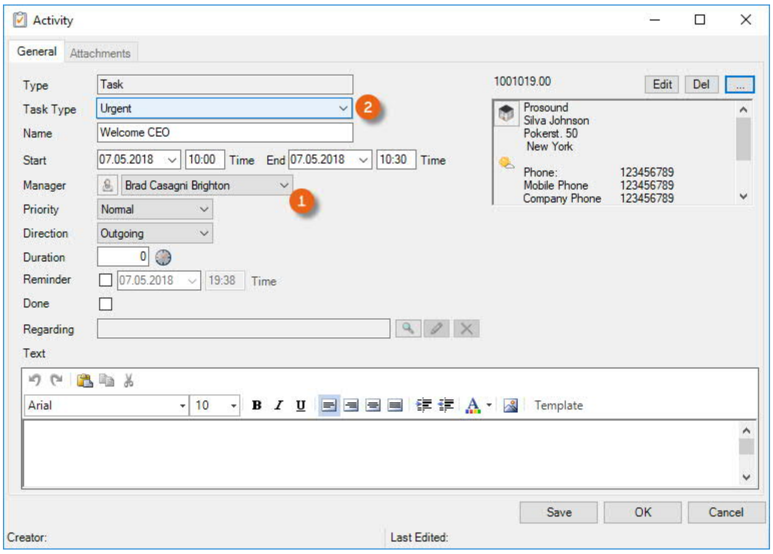
Activity Type

You can create different types of activities, such as Task, Document, E-mail, Fax, Phone, Appointment, Advertising Media, Note or Event.



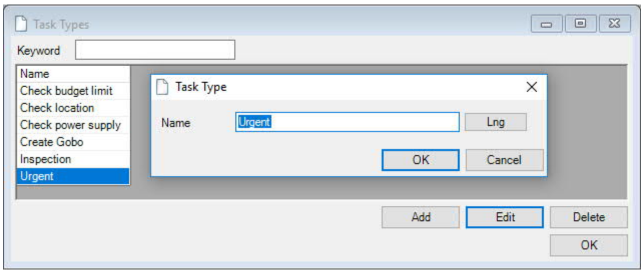
Task

By using the task Activity Type, you can create ①, edit and track as many tasks required for yourself or others. You can freely define the Task type ② in the Master Data.



Adding the task type in the Master Data:

1. easyjob Menu Master Data Task Type
2. Add
3. Enter a Name
4. Ok



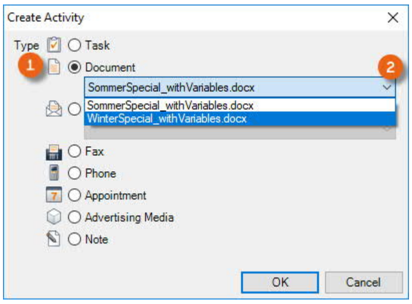
5. Ok

Quick Task

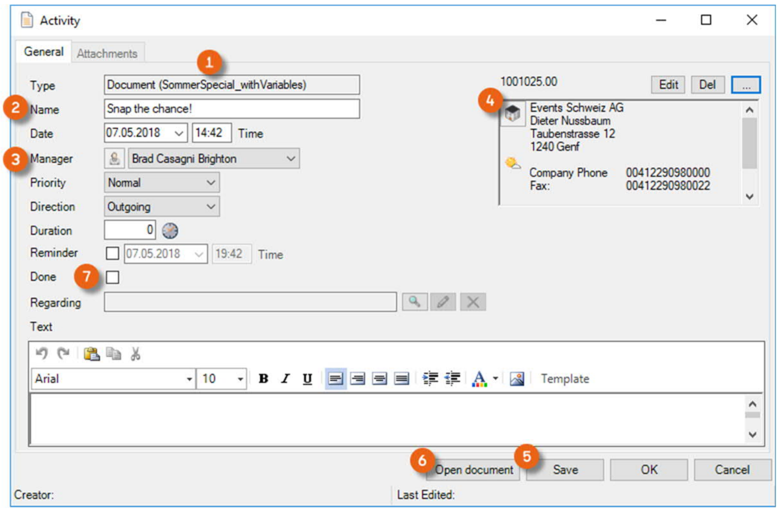
You can create a task type activity even faster using the key combination CTRL +T. Regardless of where you are in easyjob, this combination opens a new activity and you can assign a task to yourself or others.

Document

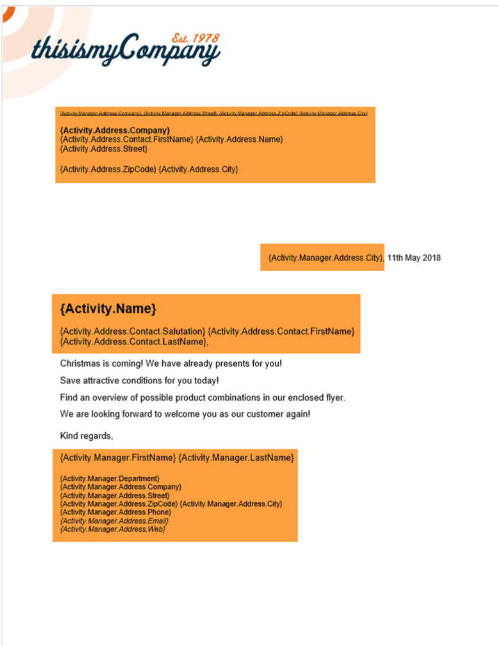
With the document activity, you can select Word documents that you previously created as a template and edited as required.

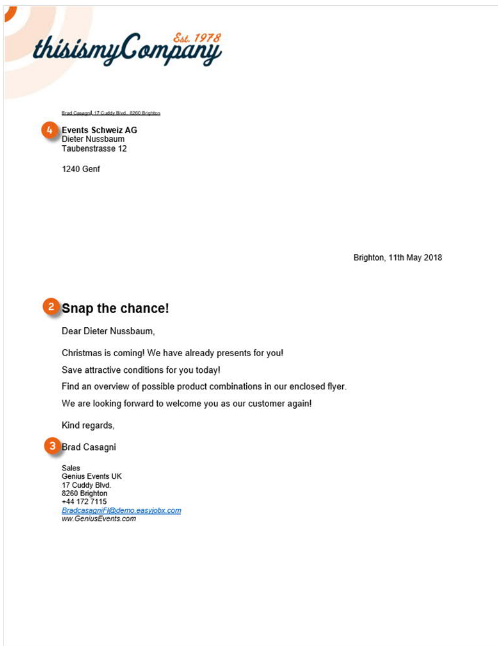


The templates can contain Variables, which are populated with various details from the activity (salutation, first and last name from the Address) when the document is opened. See also Templates and Variables.

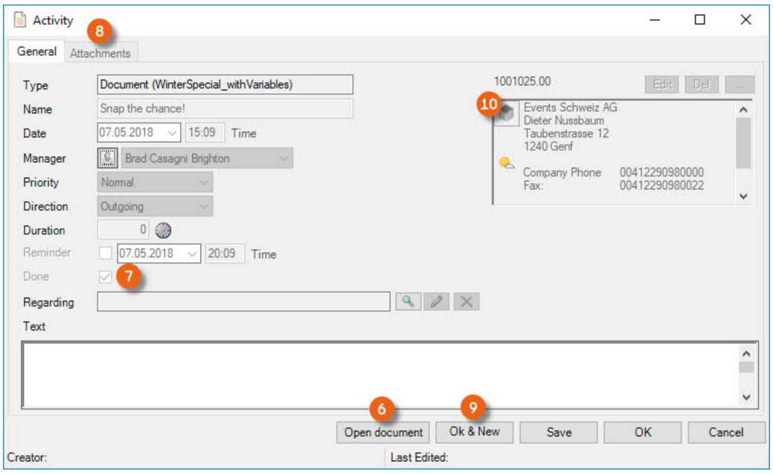


The name of the selected document ① is displayed in brackets. In this Word example, Variables are set for the fields Name ②, Manager ③ and Address ④. After pressing Save ⑤ and Open document ⑥, the created document is opened.





You can now print out the document and continue using it. After the document is opened ⑥, the activity is automatically set to Done ⑦ and the created document is saved in the activity under Attachments ⑧.

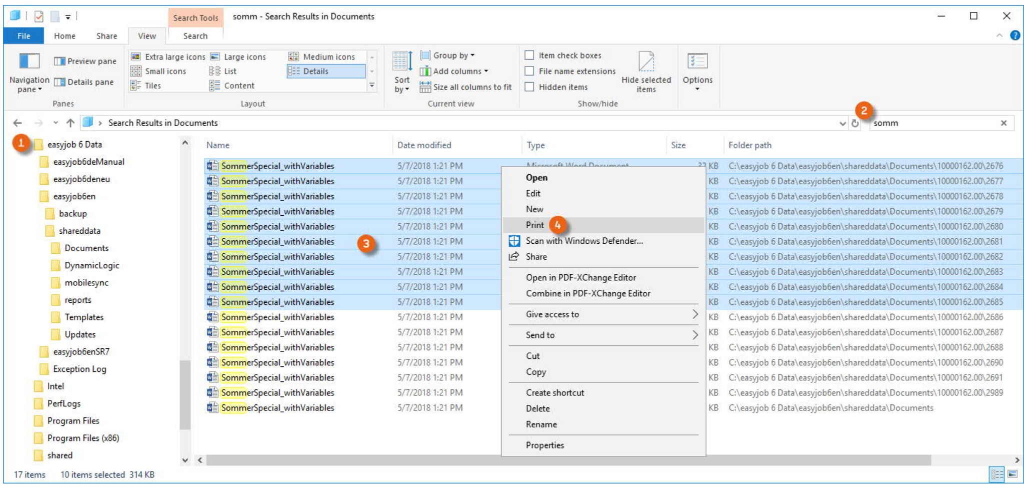


Create a new activity with Ok & New ⑨. All entries are kept and you can create the same document for another customer by changing the address ⑩.

If you want to create and print out this document for many customers, we recommend creating this activity in a campaign. In order to print all documents together, you can select them in your easyjob global directory after starting the activity and print them out together.

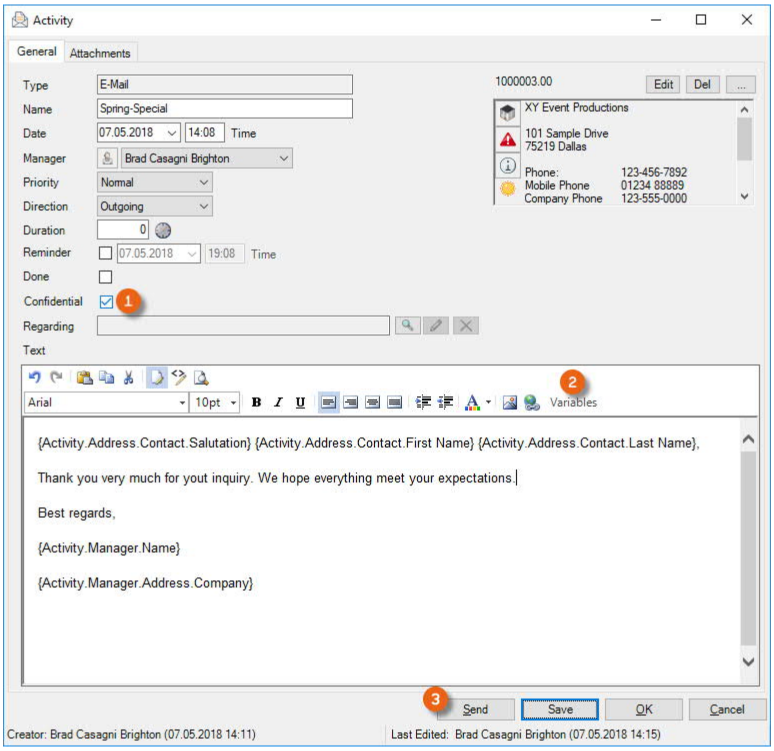
Printing documents created in a campaign together:

1.) Open the global directory ①
2.) Enter the name of the created document as search text ②
3.) Highlight all documents to be printed ③
4.) ⮎• Print



E-mail

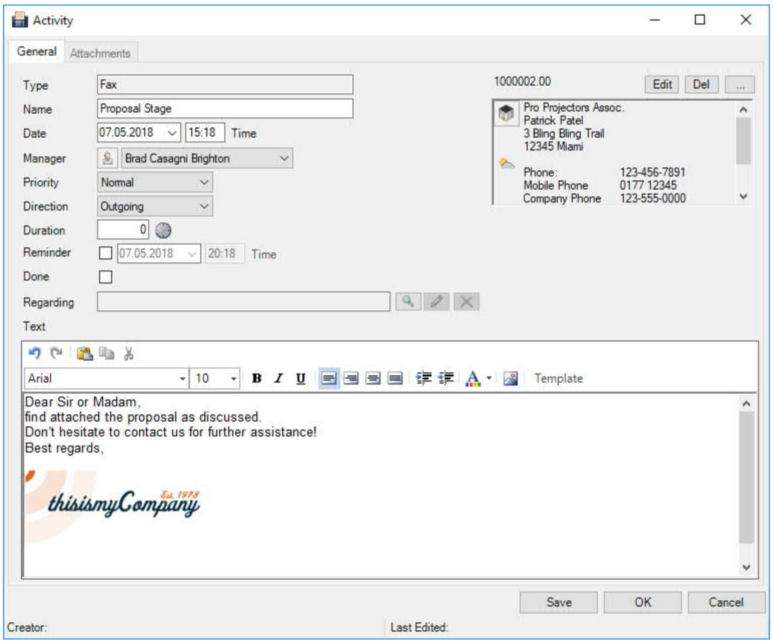
With the E-mail activity, you can create, manage and document all processes that are handled via e-mail. An e-mail activity can be marked as Confidential ① and viewed only with a separate user right. More information can be found in User settings.



You can create templates with Variables ② in the same way as for documents. More information can be found in Templates and Variables. Some settings are required before an e-mail can be sent. See also SMTP email settings or Email activities using Outlook.

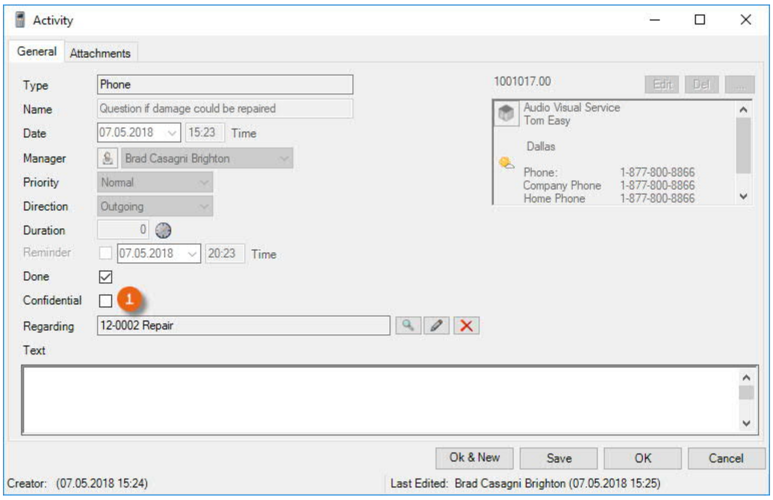
Fax

With the Fax activity, you can document incoming and outgoing faxes.



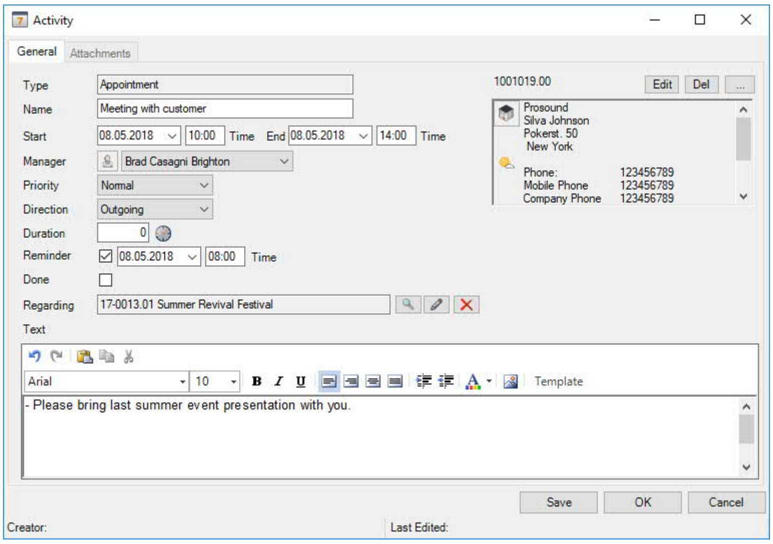
Phone

Here you can document all activities that are handled on the phone and, if necessary, mark them as Confidential ①.



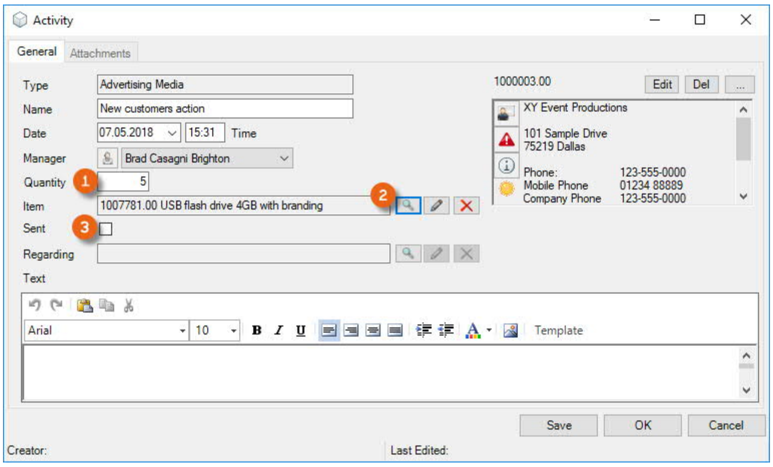
Appointment

Here you can create, document (e.g. attach the diary and the record as a document) and manage appointments,



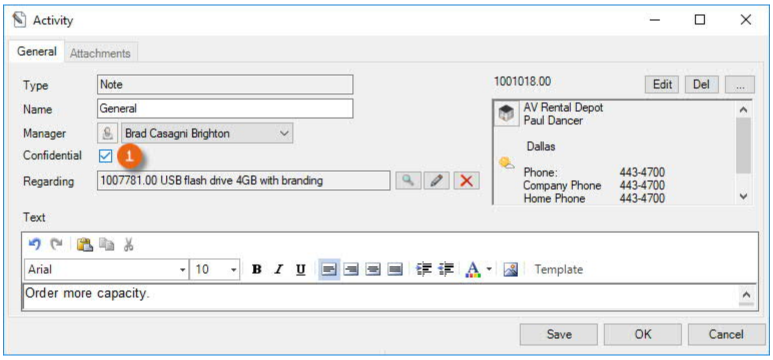
Advertising Media

The Advertising Media type of activity supports the distribution of Advertising Media. You can create the Advertising Media in the item master data as Expendable Items. Select the Quantity ① and the Advertising Media ② in the activity. By checking the Sent ③ box, an Inventory Deletion is created.



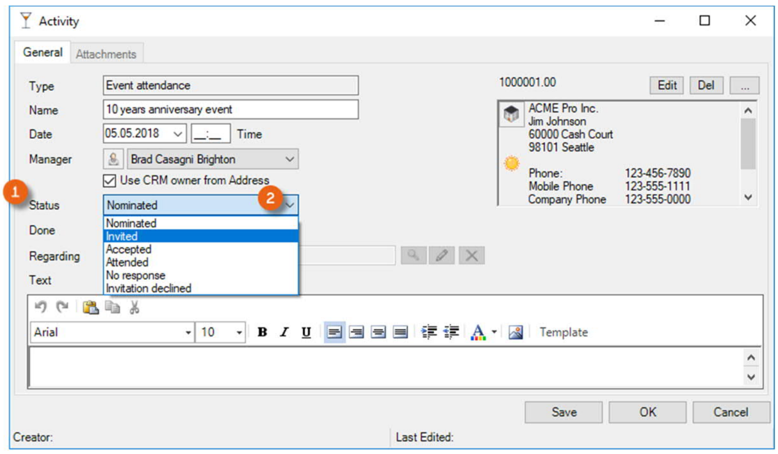
Note

For a simple note, you can create an activity and mark it as confidential, if necessary.



Event

You can create an Event activity in campaigns. You can document the status ① of the event attendance via a selection menu ② which provides you with an overview in the campaign of the status of the individual participants. See also Event attendance.

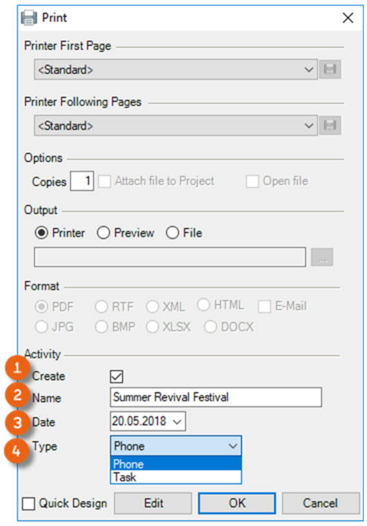


Activity in the print dialog

After you have created a Proposal, for example, you can create an activity (e.g. a phone call to discuss the Proposal, or a task for expired Proposal deadline).

Creating an activity from a print dialog:

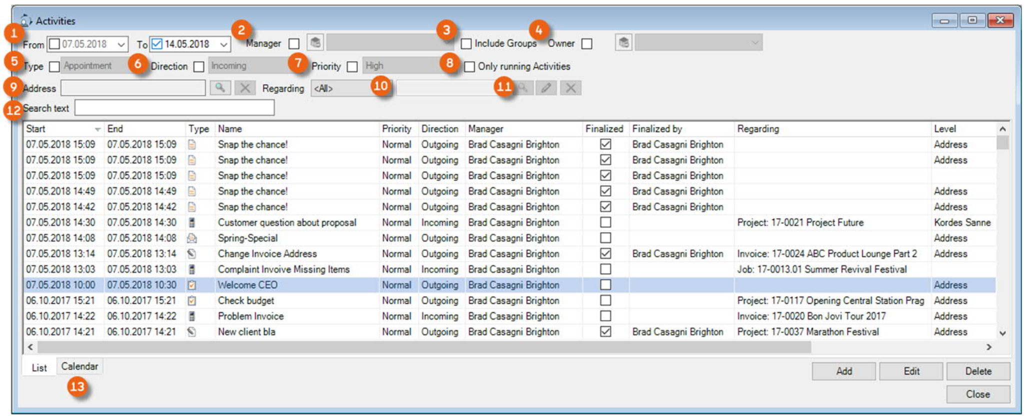
1. Click the Print Icon on the toolbar
2. Select the report for a Job Proposal
3. Select the desired Job
4. Ok



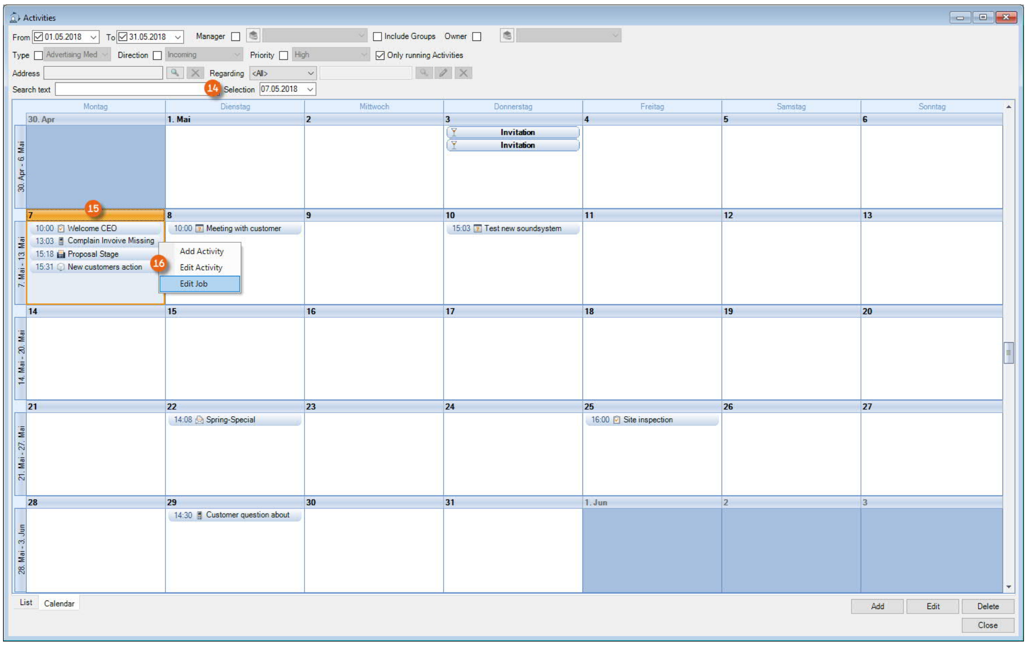
5. Under Activity, check the Create 1 box
6. Enter a Name 2, a Date 3 and set the Activity Type 4
7. Ok

Activity overview

You can display activities in the overview according to various filter criteria. In addition to the Period ①, you can limit the selection via the Manager ②, Include Groups ③ in which the selected manager is a member, the CRM Owner ④, Type ⑤, Direction ⑥, Priority ⑦, selection of Only running Activities ⑧, Address ⑨, Reference Type ⑩, the Process it concerns ⑪ and using a search text ⑫.



A graphical overview is provided on the Calendar ⑬ tab. The Selection ⑭ field shows the currently selected Day ⑮. You can carry out further actions - depending on the reference type - using the right mouse key context menu ⑯.

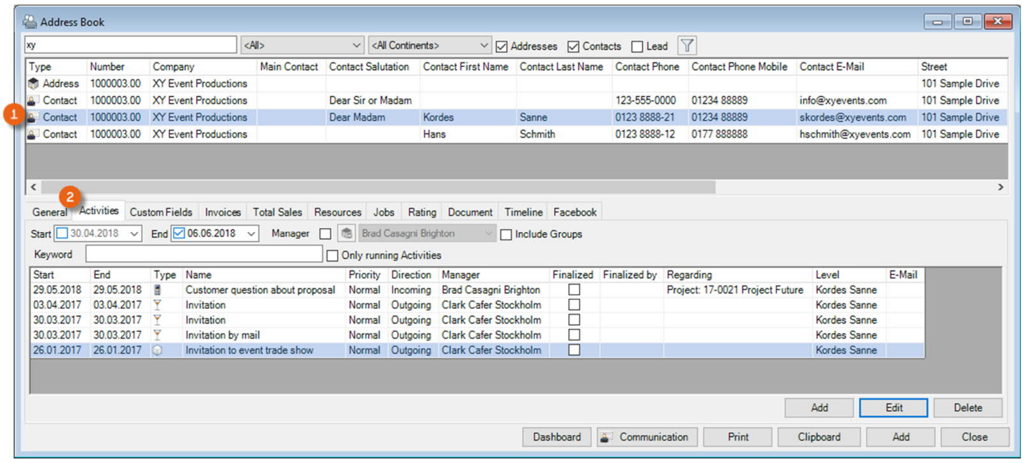


Selecting activities from the overview:

3. easyjob Menu ↬• CRM ↬• Activities
4. Set the filters as required
5. Select an activity
6. ↬• Edit

Activities in the Address Book

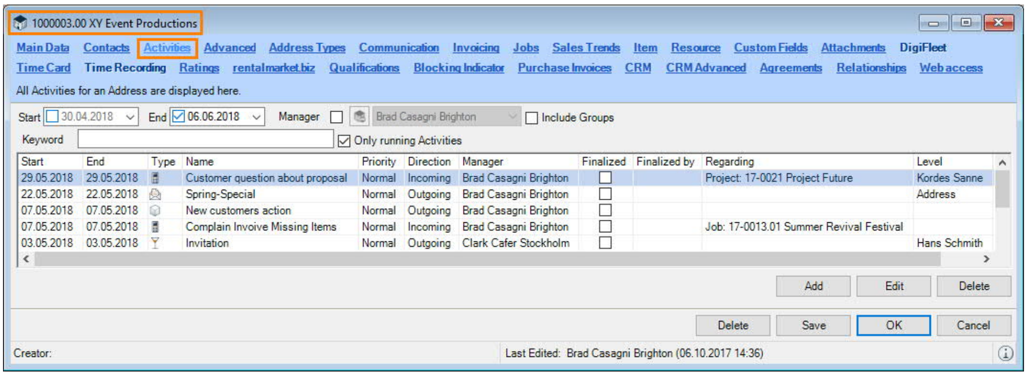
You can use the Address Book to create an overview of the activities related to the selected Address or the selected Contact and edit them if necessary. Use the up/down arrow key to select the Contact or the Address ①. The related Activities ② will be displayed in the information window. Also a timeline is available. See also Timeline in the Address Book.



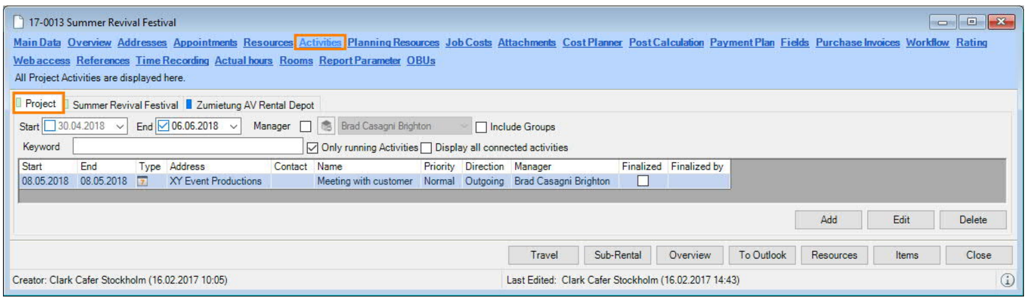
Activities in the reference type

The created activities are can also be found in the associated reference types (Addresses, etc.) Available filter options include Period, Manager, Keyword search or Only running activities. Activities can be added, edited or deleted.

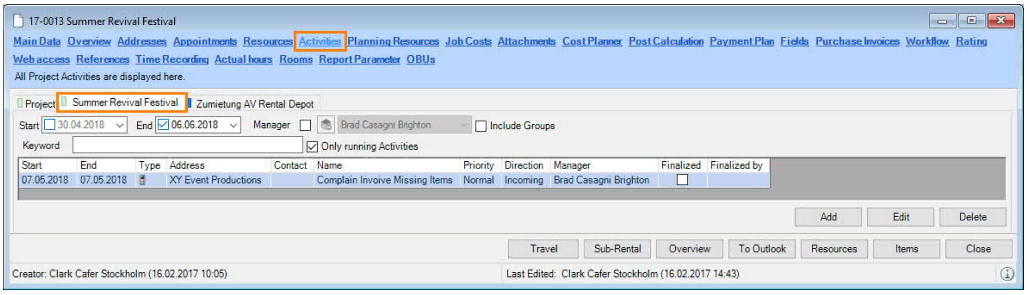
Address



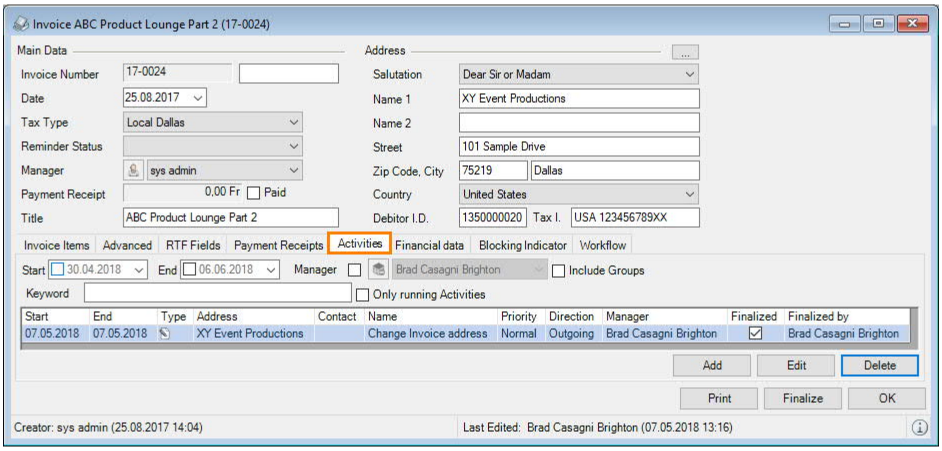
Project



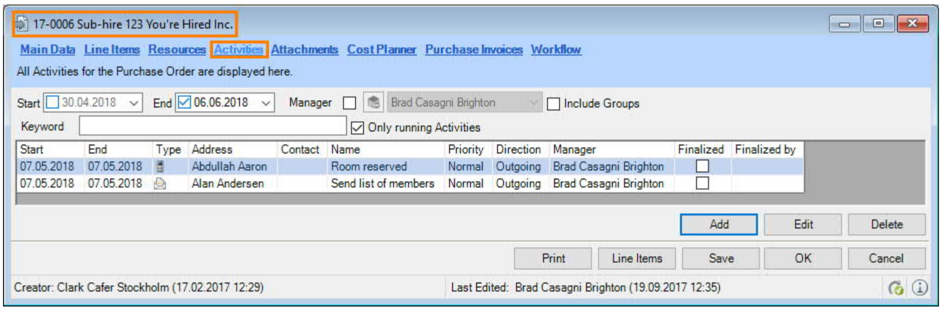
Job



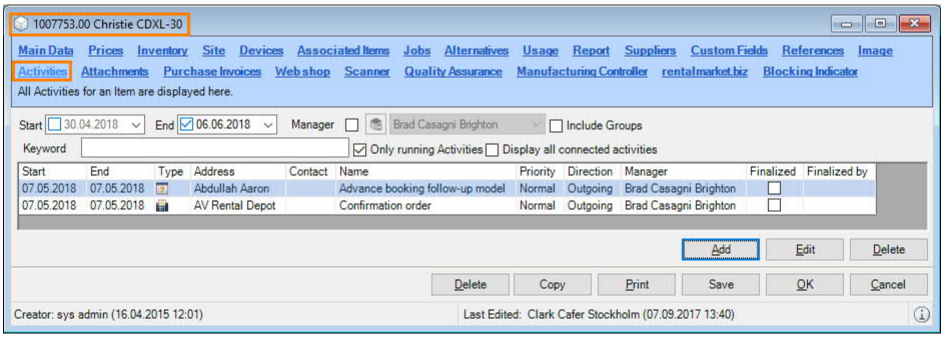
Invoice



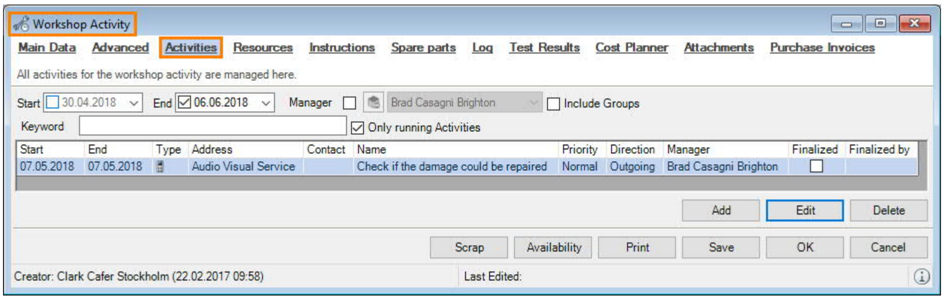
Purchase Order



Item

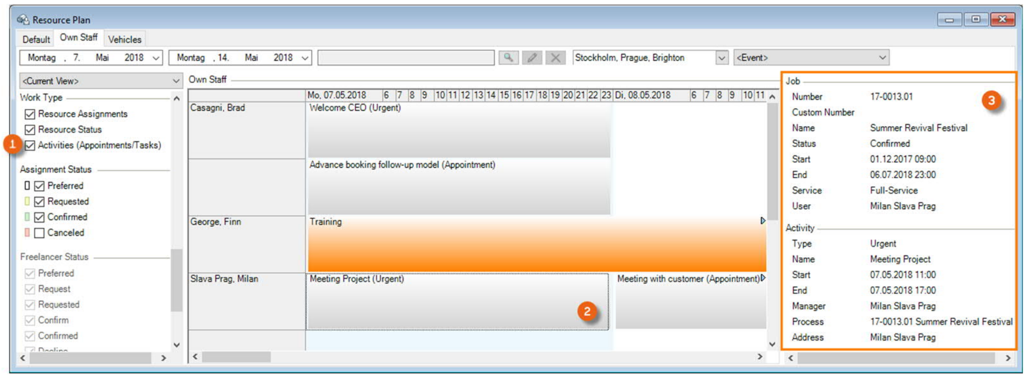


Workshop activity



Activities in the Resource Plan

Activities, such as the manager's tasks or appointments, can be displayed in the Resource Plan. To activate the display, select Activities ① in the filter under Work type. Clicking the Activity ② displays the relative Details ③.

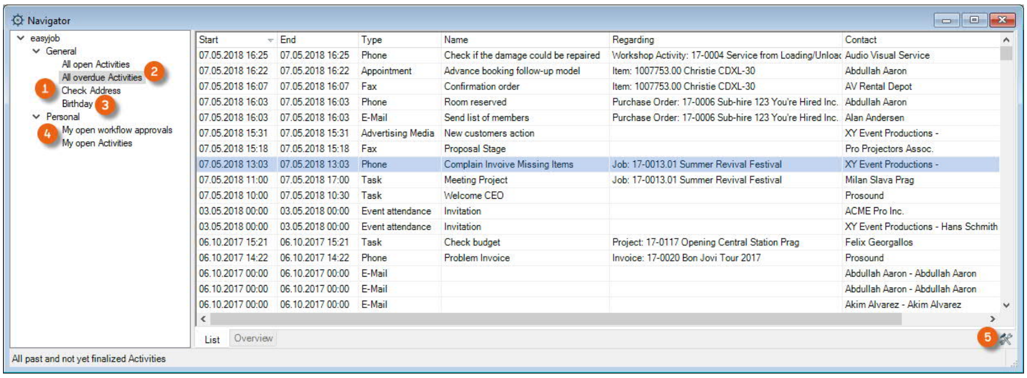


Activities at a glance

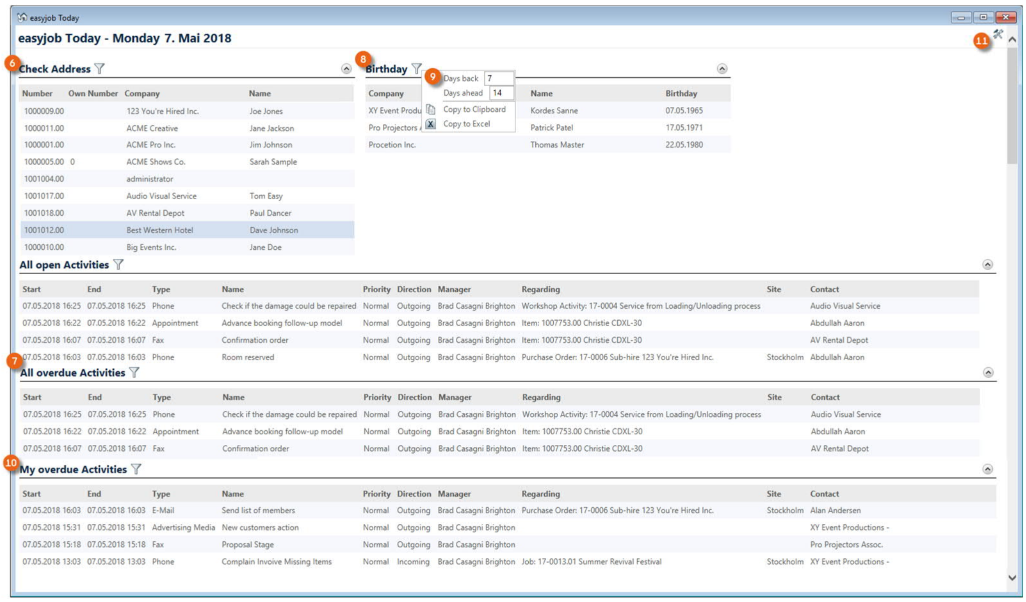
To see open and overdue activities at a glance, the Navigator, easyjob Today and the reminder screen are available.

Navigator and easyjob Today

You can create various overviews in the Navigator and in easyjob Today. In addition to the Check Address function ①(⑥), all open and overdue Activities ②(⑦) can be seen in the General area. Birthdays ③(⑧) can also be displayed. In the Personal area, you can display My open and My overdue activities ④(⑩). To add overviews in the Navigator, click Settings ⑤ and drag & drop the desired views to the left side.



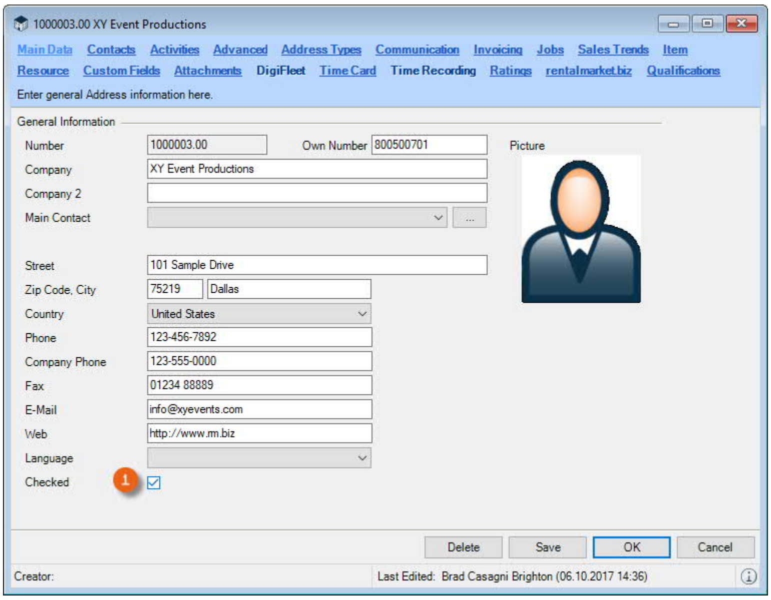
The same information sources are available in easyjob Today and in the Navigator. You can limit the period selection for Birthdays ⑧ using a Filter ⑨. To create your individual View in easyjob Today, switch to the Setting mode ⑪, select the desired Line Item and click Add View.



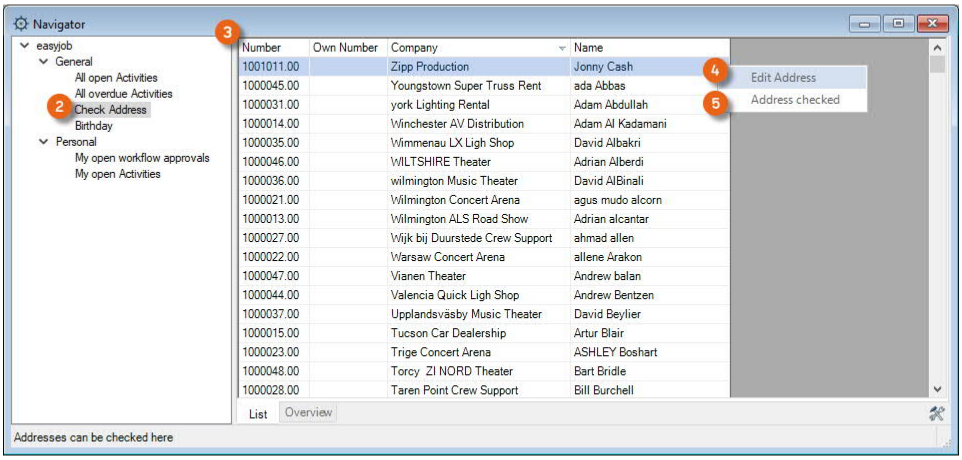
You can find a detailed description about customizing the settings for the Navigator view and easyjob Today in the easyjob 6 User Manual.

Checking an Address

Already created Addresses can be edited if necessary and marked as Checked in the Main Data ①.



With the Check Address ② function in the Navigator or easyjob Today, all Addresses that were not yet checked are displayed in a List ③, from where they can be directly Edited ④ or marked as Checked ⑤.



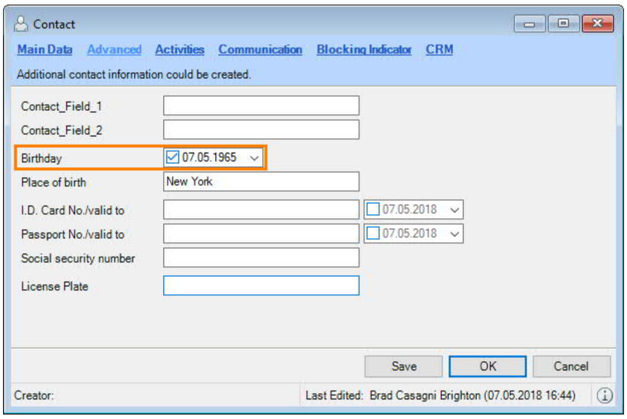
Checking Addresses with the Navigator view:

1. Click the Navigator Icon on the Toolbar
2. ↪ Settings icon
3. Drag and Drop Check Address to Navigation
4. Click the Settings icon to exit the mode
5. Select the desired address
6. ↪ Right mouse button
7. ↪ Edit Address and then mark it as ↪ Address checked

The list will only show Addresses that were not yet checked.

Birthdays

You can be informed automatically about birthdays. This View is available to you in easyjob Today and in the Navigator. You can enter the birthdays under Contacts in the Address Main Data



Entering a birthday in the Contact:

1. easyjob Menu View Address Book
2. Select an address
3. Edit Address
4. Contact tab
5. Select a Contact
6. Edit Address
7. Advanced tab
8. Enter the birthday
9. Save

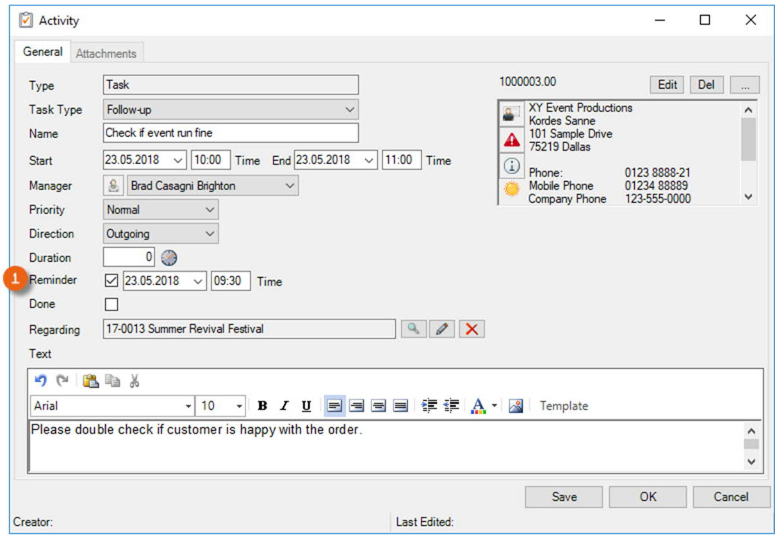
Displaying the birthday in the Navigator view:

1. Click the Navigator Icon on the easyjob Toolbar
2. Settings icon
3. Drag & Drop Birthdays to Navigation
4. Click the Settings icon to exit the mode

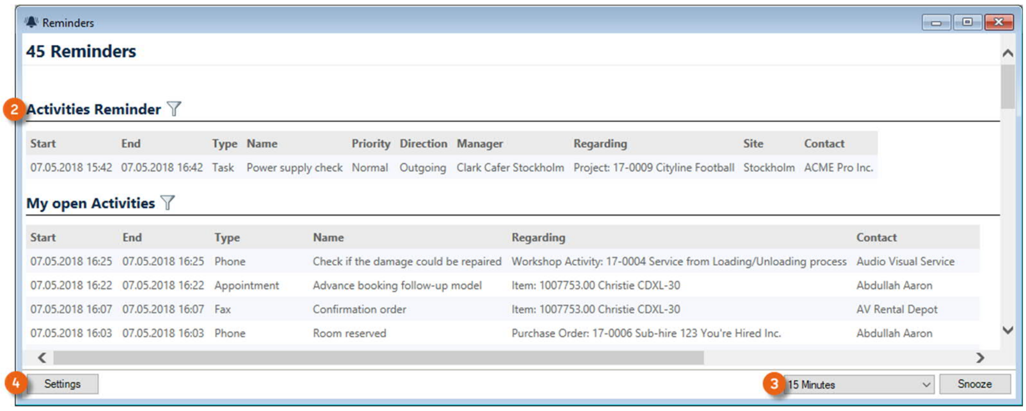
Displaying birthdays in easyjob Today:

1. Click the easyjob Today icon on the toolbar
2. Settings icon
3. Select a Line Item and Add View
4. Select Birthdays
5. Ok
6. Click the Settings icon to exit the mode

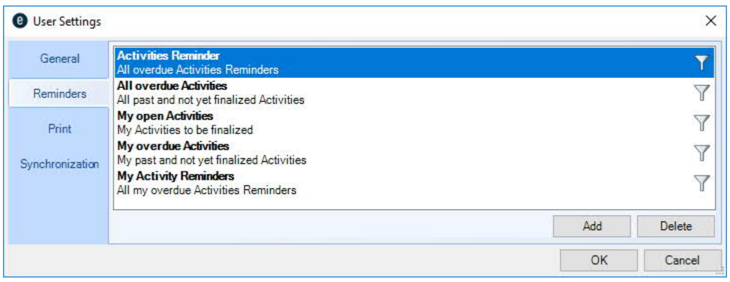
Reminder Screen



If you set a Reminder ① for an activity, you can have this activity displayed on the Reminder window ② and specify the Reminder interval ③.



With Settings ④ you can select from among various reminder views.



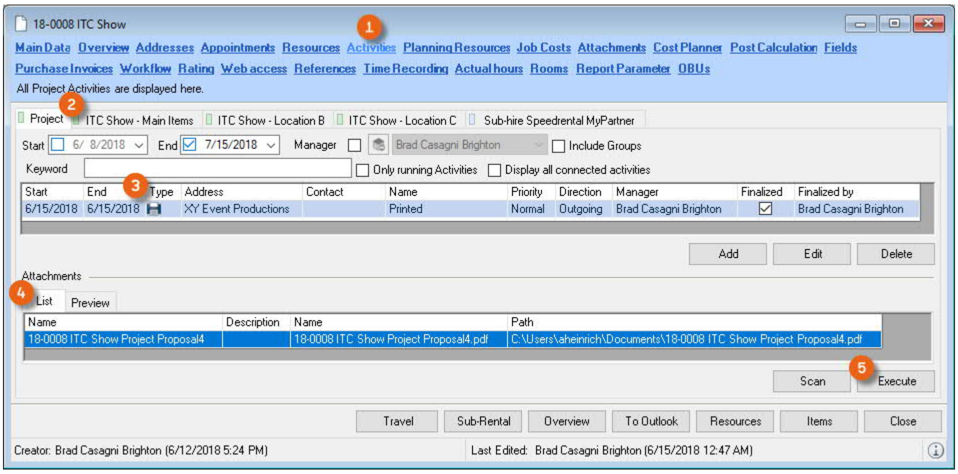
Activating reminders from the easyjob Menu:

1. easyjob Menu ↪• Tools ↪• User Settings
2. ↪• Reminders tab
3. ↪• Add
4. Select the desired settings and any filter options
5. ↪• Ok

easyjob must be restarted to activate the changes.

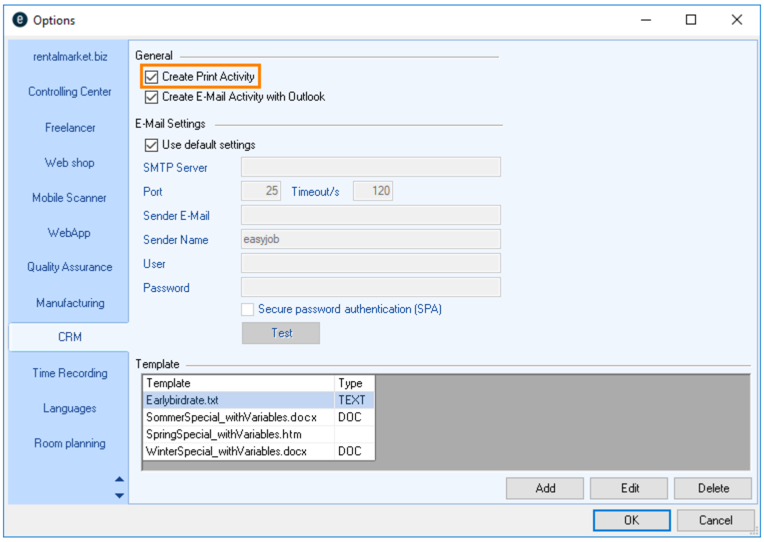
Print activities

When printing a report (e.g. Proposal) in a project and in a Job you can automatically create an activity. This creates a Print activity ③ in the Activity overview ① for the Project/Job ② with various information such as the Print date, Address, Contact, Manager, etc. The relative PDF document ④ will be saved and can be reopened at any time with Execute ⑤ or by double clicking it.



Activating automatic print activity creation:

1. easyjob Menu ➜ Tools ➜ Settings
2. Select the CRM tab

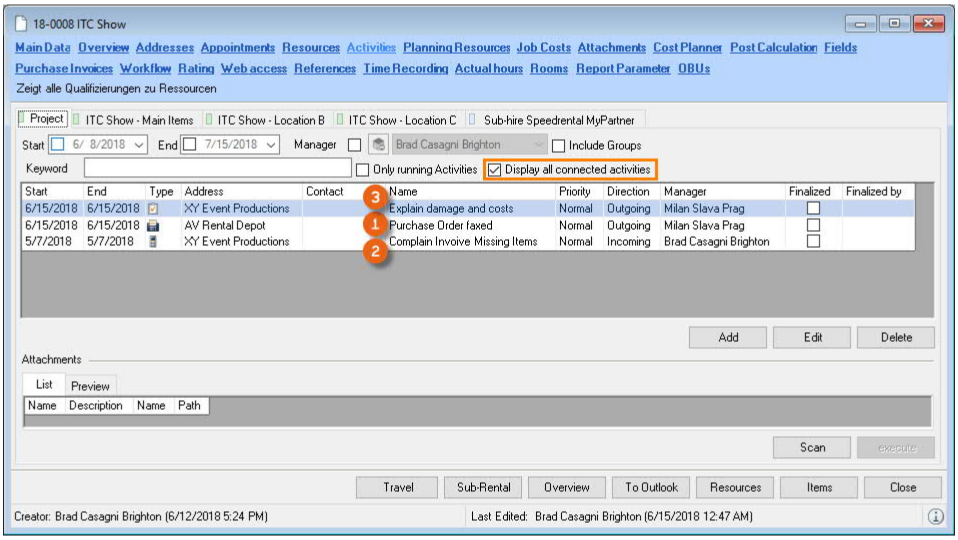


3. Check the Create print activities box
4. ➜ Ok

easyjob must be restarted to activate the changes.

Connected activities

In order to be informed in a project about all of the CRM activities related to this project, you can use the function Display all connected activities. If this selection has been activated, all activities for the relevant Purchase orders ①, Invoices ③ and Workshop activities ② will be displayed in the Job activities.

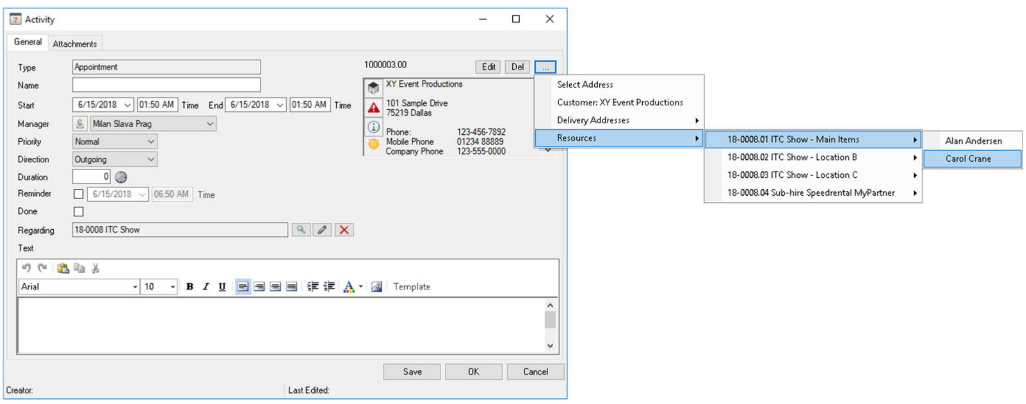


Activating all connected activities:

1. easyjob Menu ⇆• View ⇆• Projects
2. Select a project
3. ⇆• Edit
4. ⇆• Activities tab
5. Check the box for Display all connected activities

Quick Change of the Address in the Project

If an activity is created in a project, the project customer is automatically preset. Via the address selection Quick Change function, you can display all Addresses present in this project to use them for a new activity.

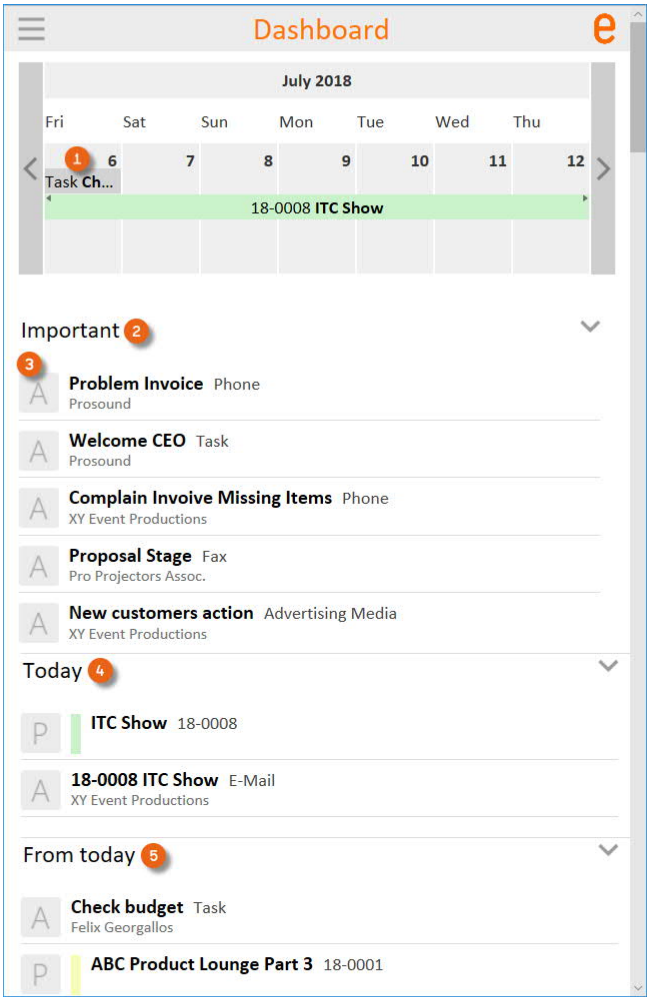


Activities in the WebApp

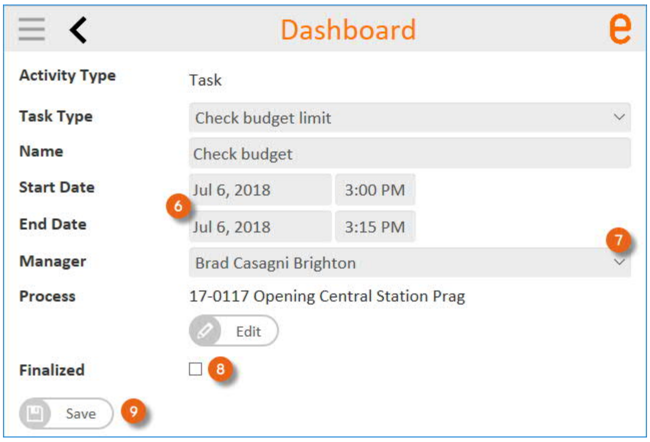
Information from CRM can be viewed and managed using the easyjob 6 WebApp.

Dashboard

The WebApp Dashboard provides you with an overview of your activities. In the calendar overview, you can see the Activities ① scheduled for the day and can open and edit them. Your open activities are displayed under Important ②. Activities are indicated with an A ③. Your activities are also displayed under Today ④ and From today ⑤.

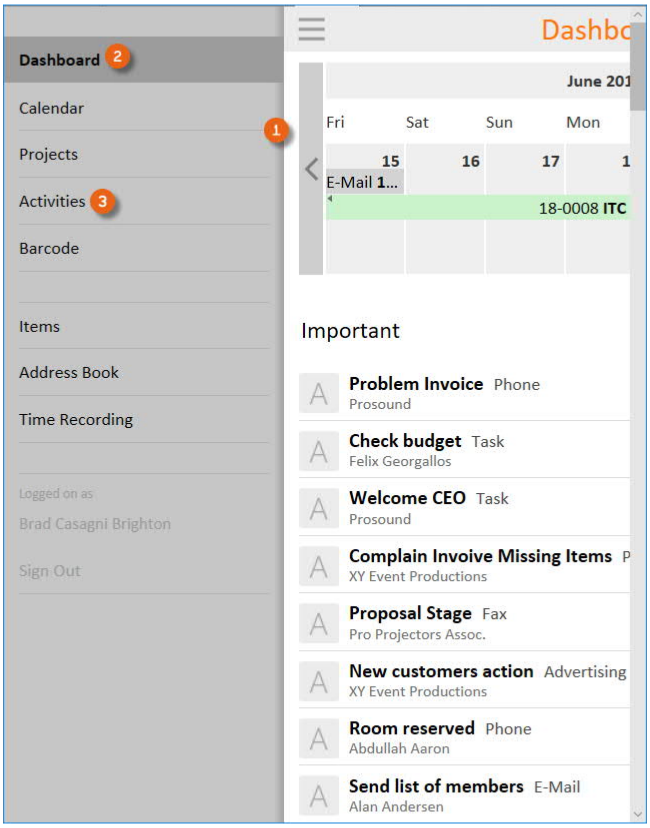


To edit an activity, tap it and you can change the start and end time ⑥, the Manager ⑦ and the Address ⑧, mark the activity as Done ⑨ and save your entries ⑩.

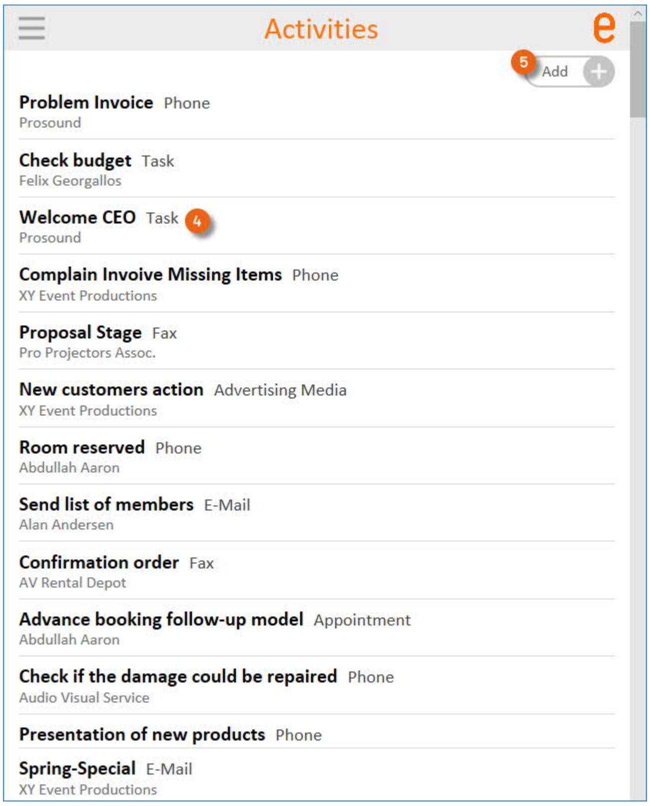


Activities

With the WepApp Menu ① you can switch from the Dashboard ② to Activities ③.

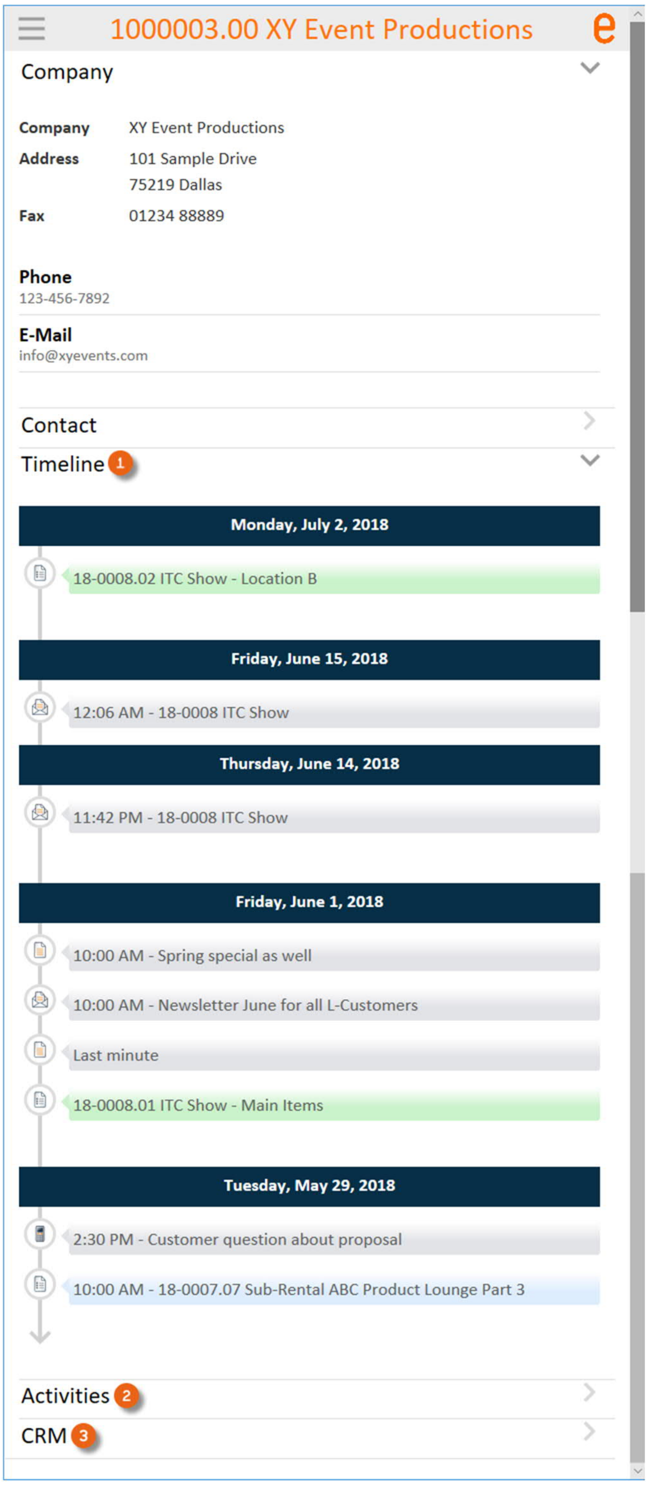


There you can Edit activities ④ or Add new activities ⑤.



Address Book

The Timeline ①, all the activities assigned to the Address ② and the CRM Advanced ③ information is available in the Address Book.

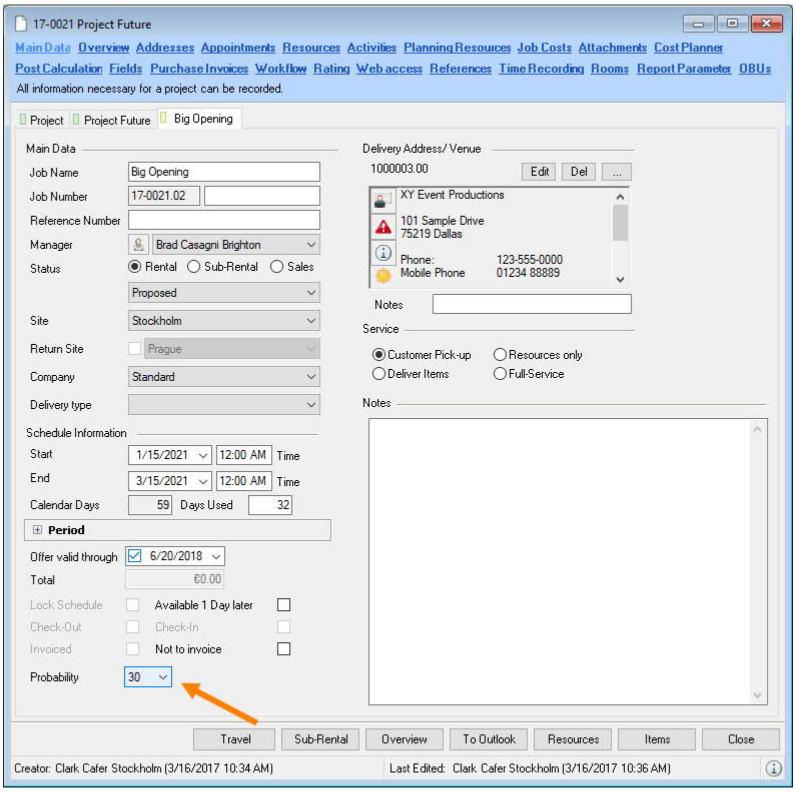


Project management

In Project Management, in addition to the project or job related activities, it is also possible to collect and evaluate CRM relevant information (probability, cancellation reason, etc.).

Probability

When creating a Project or a Job, you can assign a probability to it.

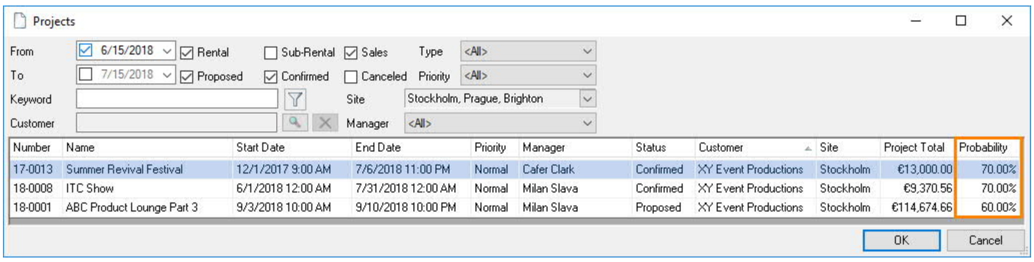


Entering the probability:

1. easyjob Menu → Projects → Edit Project
2. Select a project
3. → Ok
4. → Main Data tab
5. Enter the desired probability

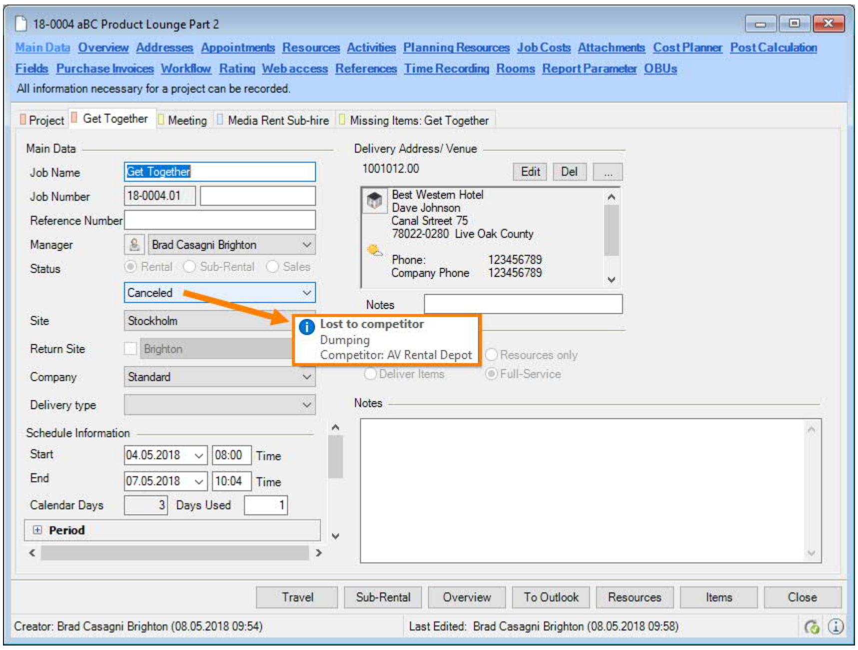
You can assign a probability only to Projects and Jobs with a Proposed status.

The probability is displayed, for example, in the Project/Jobs View. The entries can be evaluated in the easyjob Business Information Center.



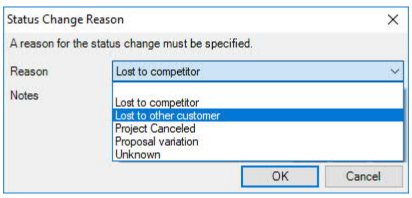
Cancellation reason

When a Job or Project is Canceled, you can enter the cancellation reason for future evaluations. Cancellation reasons include Proposal variation (if you created multiple Proposals at the same time for the same Request), Project Canceled, Unknown, Lost to other customer (if, for example, another agency for which you are a subcontractor received the order – in addition you can add the new, confirmed project) or Lost to competitor (in this case, you can enter the competitor). In all cases, you can enter a remark. The information you entered is displayed with MouseOver.



Canceling a Project/Job:

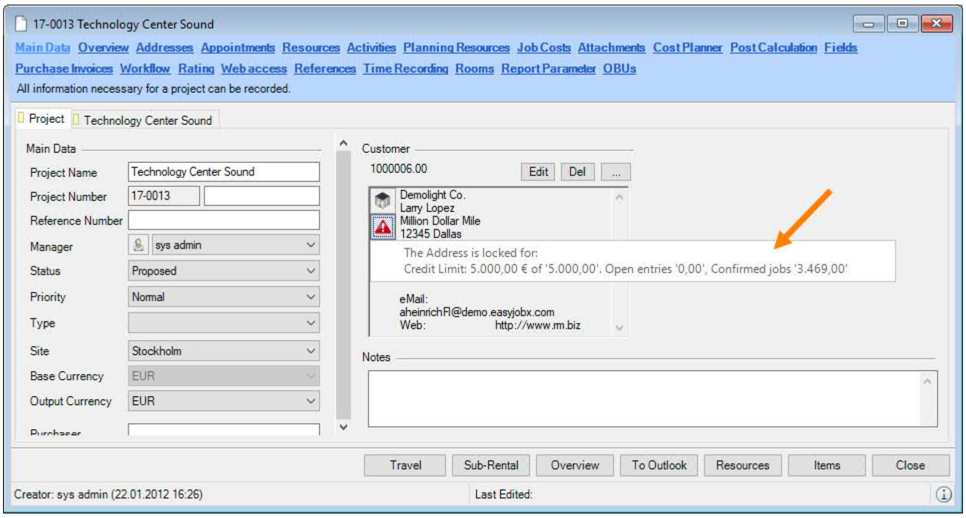
1. easyjob Menu Projects Edit Project
2. Select a project
3. Ok
4. Select a Job if necessary
5. Main Data tab
6. Set the status to Canceled



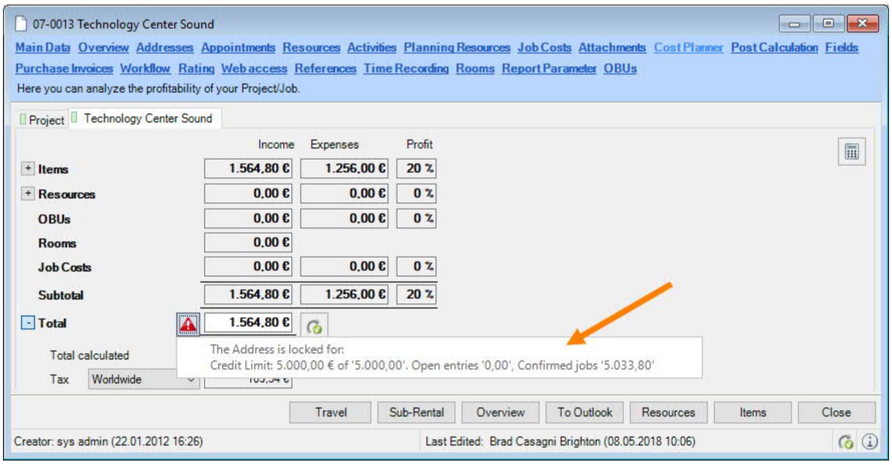
7. Enter the reason and any other information
8. Ok

Credit Limit in the Project

If you have set a Credit Limit in the Address Master Data, this will be displayed with the amount of the Credit Limit and the sum for Open Entries and the sum for currently Confirmed Jobs.



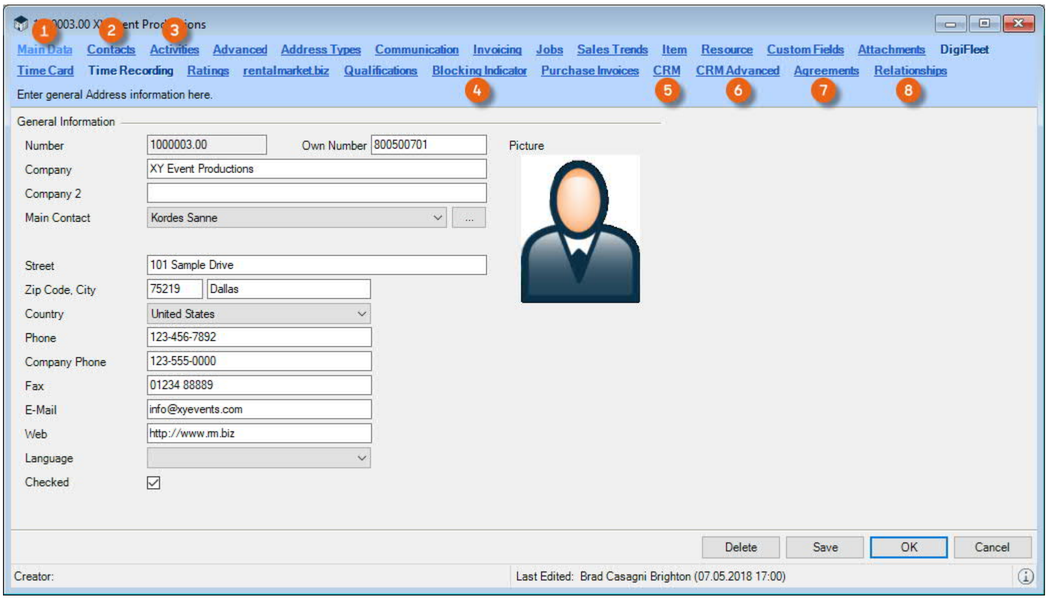
A warning is displayed in the Job and the Cost Planner if the Total exceeds the Credit Limit.



See also Credit Limit Blocking Indicator.

Address Master Data

You can enter a wide range of information for an address in the Address Master Data. CRM fields are available on the Master Data ①, Contacts ②, Activities ③, Blocking Indicator ④, CRM ⑤, CRM Advanced ⑥, Agreements ⑦ and Relationships ⑧ tabs.

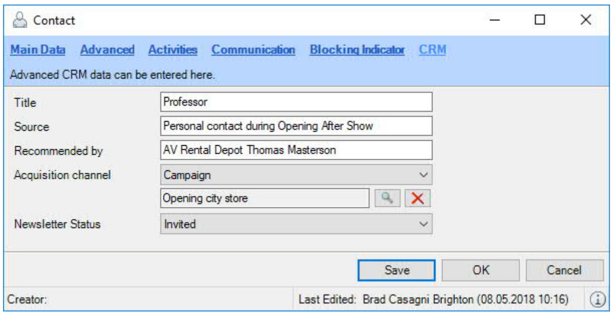


Main Data

See Checking an Address.

Contacts

For Contacts, you can enter information such as the Title, Source, Recommended by, Acquisition channel and the Newsletter Status.



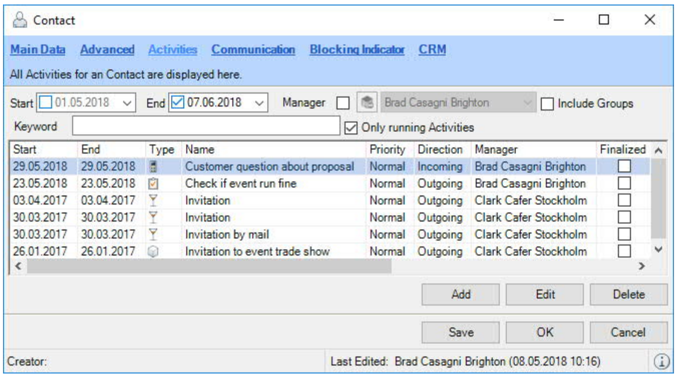
Entering CRM information for a Contact:

1. easyjob Menu ⇒ View ⇒ Addresses
2. Select a Contact ⇒ Edit
3. ⇒ CRM tab
4. Enter the information
5. ⇒ Save

You can assign specific activities to the Contact and enter a Blocking indicator.

Entering activities for a Contact:

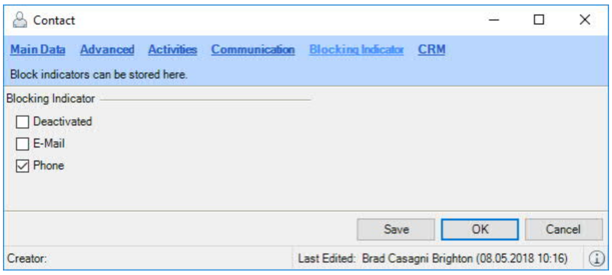
1. easyjob Menu ⇨ View ⇨ Addresses
2. Select a Contact ⇨ Edit
3. ⇨ Activities tab



4. Create the desired Activities
5. ⇨ Save

Activating a Blocking indicator in the Contact:

1. easyjob Menu ⇨ View ⇨ Addresses
2. Select a Contact
3. ⇨ Edit
4. ⇨ Blocking Indicator tab
5. Enter the desired Blocking indicators



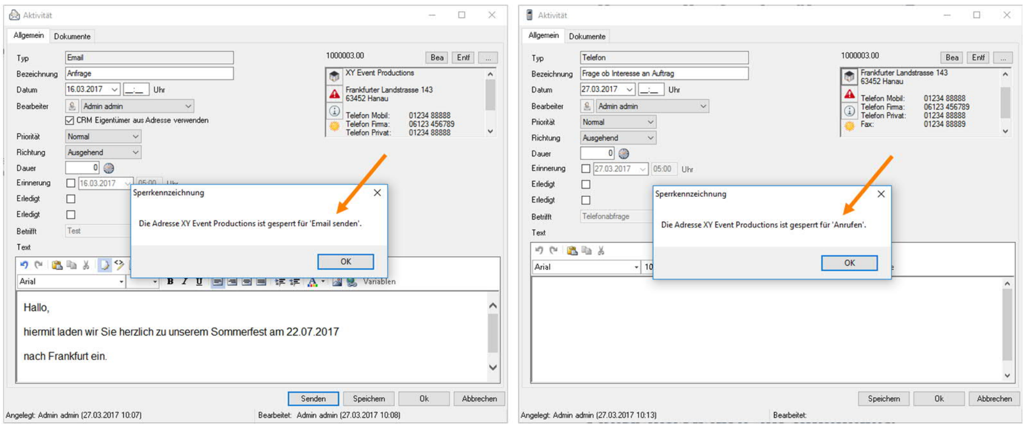
6. ⇨ Save

Activities

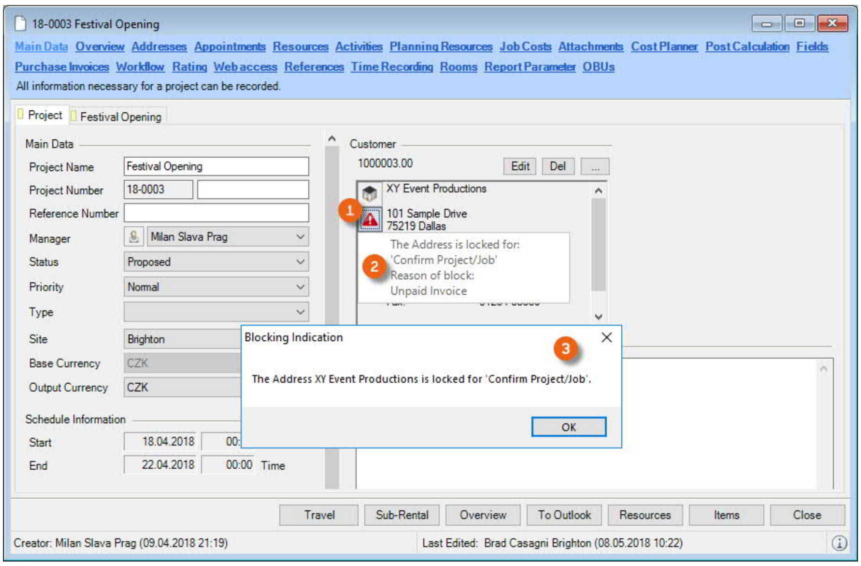
Here you can find an overview of the activities assigned to this Address See also Activities in the reference type.

Blocking indicators

Blocking indicators are available on an address and contact level. With a Blocking indicator, you can block various activities for this Address. For example you can block the creation of a Reminder or limit the CRM Communication channels for the respective Address or Contact, if the customer does not want to receive e-mails in general or does not want to be called.



If you have activated a Blocking indicator for a customer, a symbol ① will appear in the address field. With the left mouse button, the name of the Blocking indicator and the reason for the block ② are displayed. If an attempt is made to perform an activity (e.g. Confirm Job) for which a Blocking indicator has been set, a dialog window opens and the activity cannot be carried out.



When changing Blocking indicators, a log entry is made for the address. In this way you can see who set or released which Blocking indicator and when it was done.

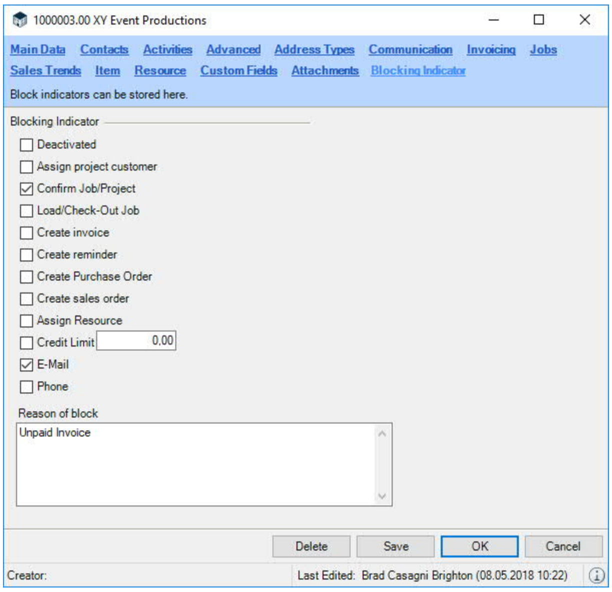
Credit Limit Blocking Indicator

You can enter an individual value for the Credit Limit Blocking Indicator. If a customer is selected for a new project, the sum of the open entries and the sum of the confirmed Jobs is added and you will receive a corresponding message. See also Credit Limit in the Project.

Blocking indicators in an Address

Activating Blocking Indicators for an Address:

1. easyjob Menu View Addresses
2. Select an address
3. Edit
4. Blocking Indicator tab



5. Enter the desired Blocking indicators
6. Save

Blocking indicators in a Contact

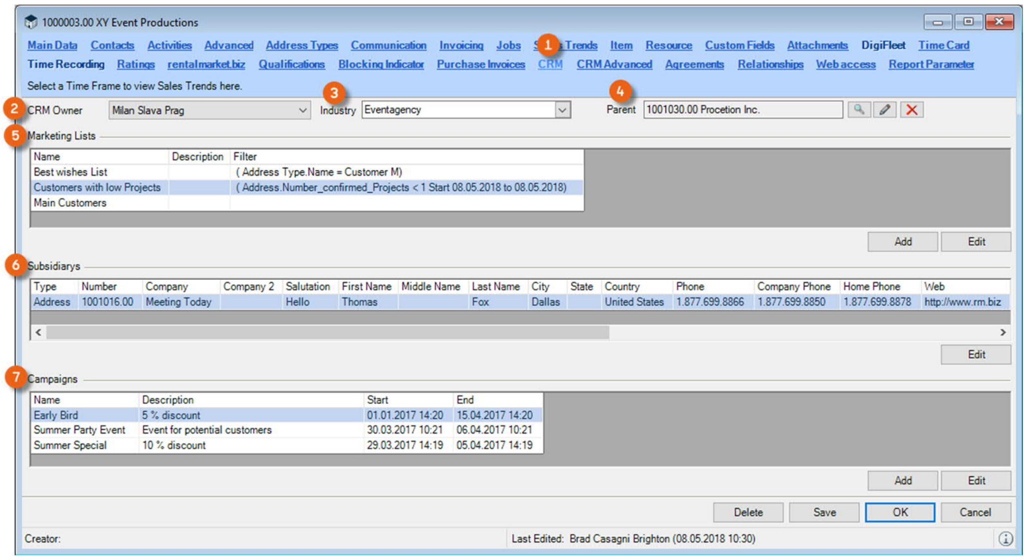
See Contacts.

Deactivate address

You can also deactivate individual addresses. The Address can no longer be selected. Any Activities in which the Address was used prior to deactivation will remain saved. You can assign separate user rights for deactivation and for viewing Deactivated Addresses.

CRM

The CRM ① tab provides you with an overview of the CRM Owner ②, Industry ③ (Supplier/Stand builder/etc.), Parent address ④ (if the customer is a subsidiary), Marketing Lists ⑤ in which the customer is a member, Subsidiaries ⑥ this customer owns and Campaigns ⑦ in which the customer was involved or will be in the future.



In this overview, you can Add Marketing Lists and Campaigns or Edit already existing ones. The Address Master Data for the Subsidiaries can be edited.

Making CRM entries for an Address:

1. easyjob Menu ⇒ View ⇒ Addresses
2. Select an address
3. ⇒ Edit
4. ⇒ CRM tab
5. Enter the desired content
6. ⇒ Save

CRM Owner

The Address can be assigned to a user. This is the Employee that takes care of this customer from a CRM point of view. With entry, filters can be created, for example.

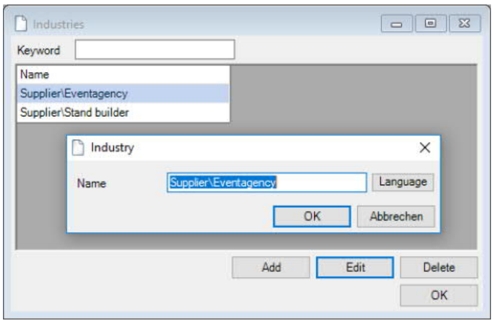
You can assign a right for Change Foreign Owner in the User settings. If this right is not activated, Addresses and Contacts cannot be assigned to other users.

Industry

The multi-level industry selection makes it possible for you to split suppliers between event agencies and stand builders, or divide the federal government into different states, and these in turn into municipalities. You can evaluate the entries in various areas (easyjob Business Information Center).

Creating an industry selection:

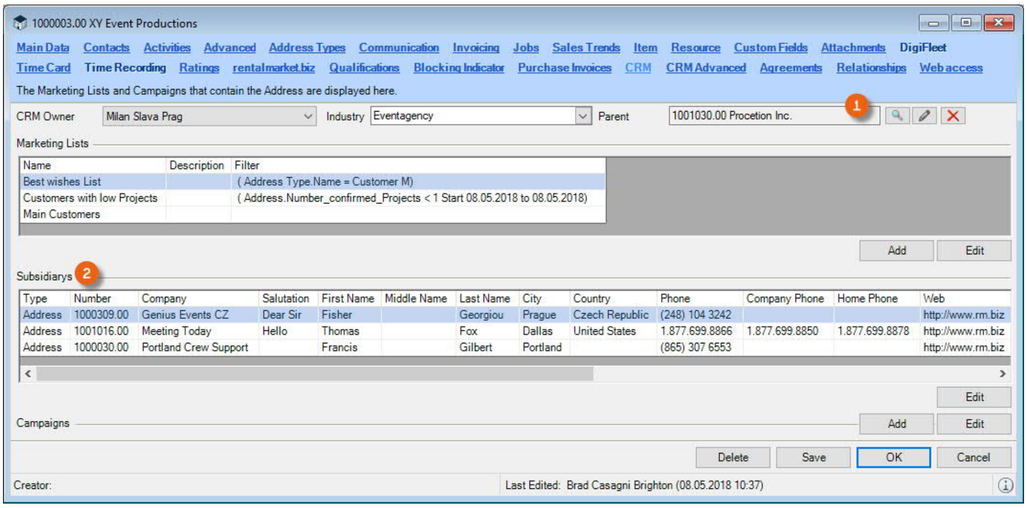
1. easyjob Menu ⇆• Master Data ⇆• Industries
2. ⇆• Add



3. Create the industry level separately with the backslash
4. ⇆• Ok

Parent address and Subsidiaries

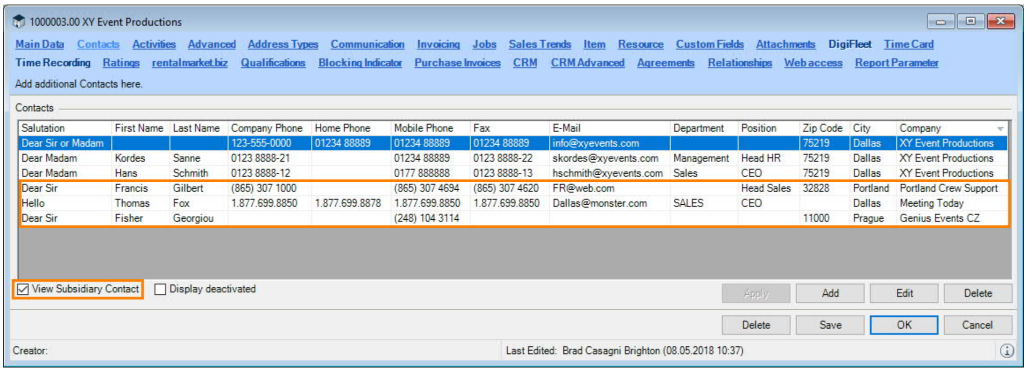
In order to better display the group structure, you can assign a Parent address ① to each Address. The assigned Address will be automatically displayed as a Subsidiary ② in the CRM address tab for the parent address.



Assigning the parent address:

1. easyjob Menu ⇆• View ⇆• Addresses
2. Select an Address ⇆• Edit
3. ⇆• CRM tab
4. Assign the parent address
5. ⇆• Save

Also the Contacts for the subsidiary can be displayed in the Contacts for the parent address.

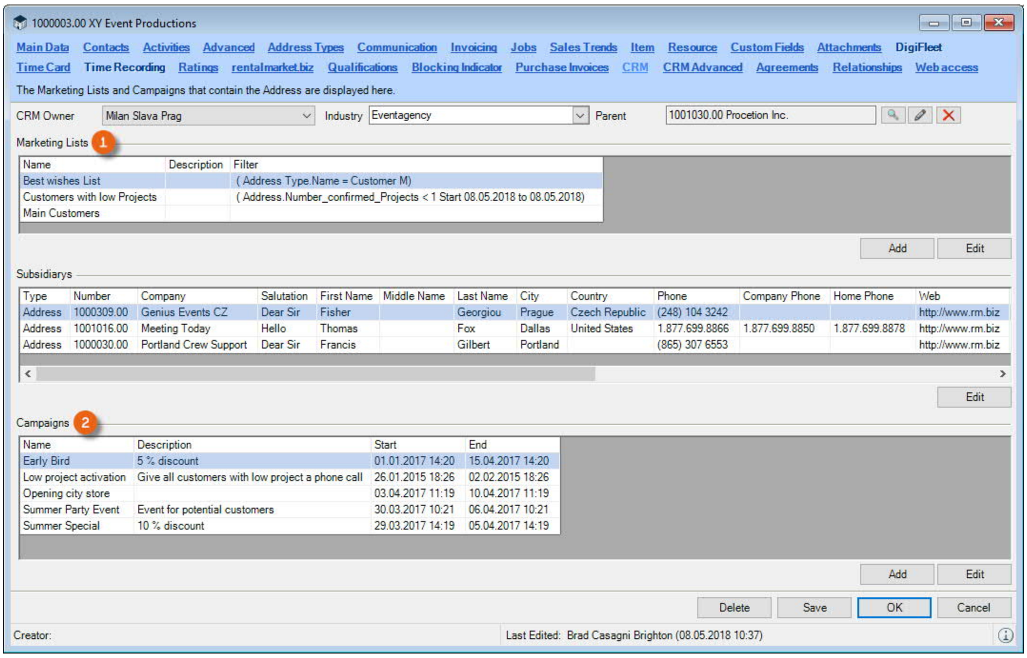


Displaying subsidiary contacts:

6. easyjob Menu ⇝ View ⇝ Addresses
7. Select an Address ⇝ Edit
8. ⇝ Contact tab
9. Check the View Subsidiary Contacts box

Marketing Lists

In order to carry out campaigns, you can create marketing lists for certain target groups in the Master Data. The CRM address tab shows which Marketing lists ① the Address belongs to. See also 🗍 Marketing Lists.

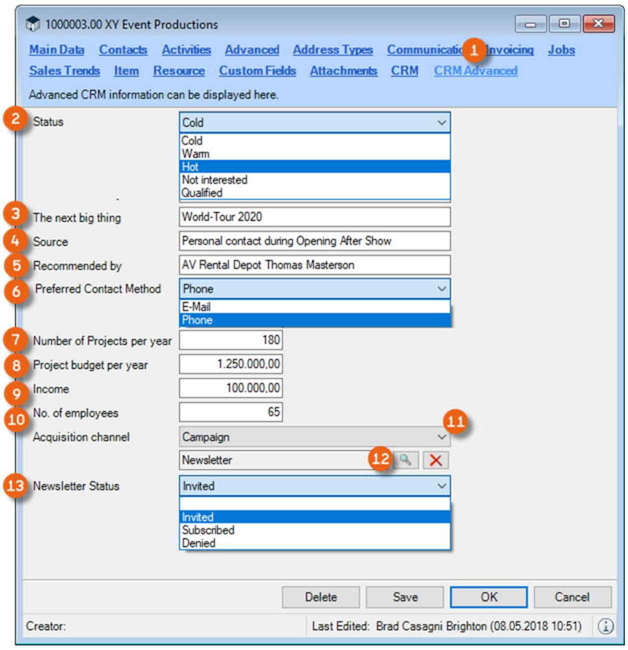


Campaigns

All Campaigns ② in which the customer was involved are displayed here. Additional campaigns can be added or already existing campaigns can be edited. Additional information can be found in 🗍 Campaign.

CRM Advanced

You can enter additional information about the address on the CRM Advanced ① tab. With details such as Status ② (Cold, Warm, Hot, Not interested and Qualified*), The next big thing ③ (the customer's next large project), Source ④ (where the information comes from), who the customer was Recommended by ⑤, Preferred Contact Method ⑥ (E-mail or Phone), Number of Projects per year ⑦, Project budget per year ⑧, Income ⑨, No. of employees ⑩, Acquisition channel ⑪ (e.g. a campaign and its name ⑫) and the Newsletter Status ⑬ (Invited, Subscribed and Denied), your sales team is able to record, evaluate and use important information about this customer.

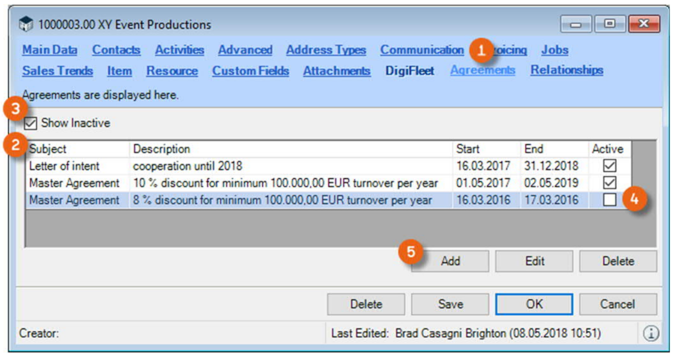


Making CRM Advanced entries for an Address:

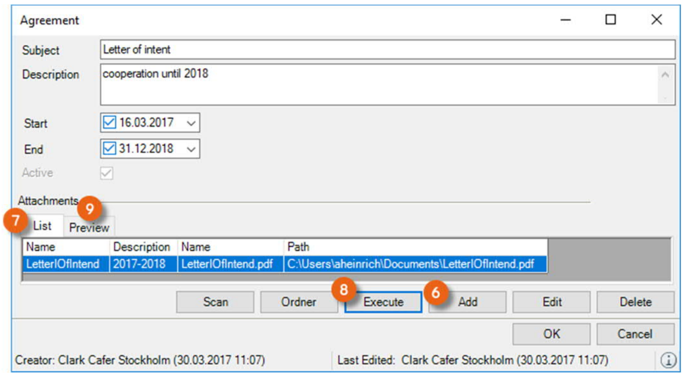
1. easyjob Menu View Addresses
2. Select an address
3. Edit
4. CRM Advanced tab
5. Enter the desired content
6. Save

Agreements

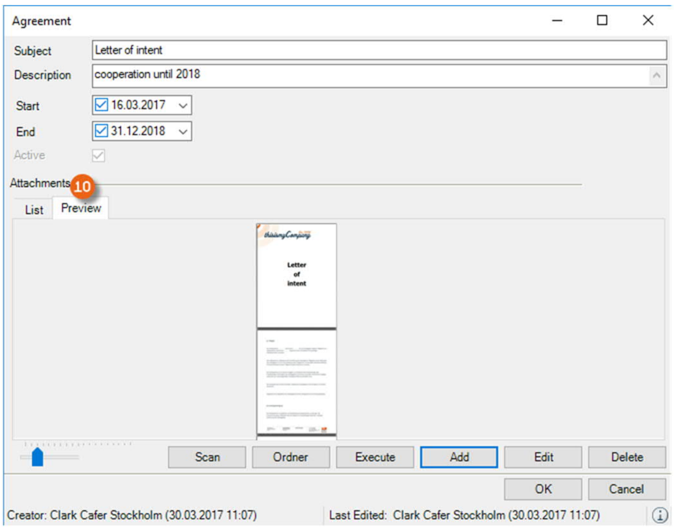
Another option for documenting your customer relationships is available on the Agreements ① tab. Master Agreements, Letters of intent, etc. can be documented and managed here in a clear manner. An Overview ② shows the topic, a description as well as the start and end of the agreement. With the Show Inactive ③ filter, you can display agreements that are no longer active ④. With Add ⑤ you can create a new agreement.



In addition, you can add Attachments ⑥ for the agreement. The corresponding documents are shown in a List ⑦, which can be opened by double clicking them or by pressing Execute ⑧.



The selected Document ⑩ is displayed in the Preview ⑨.



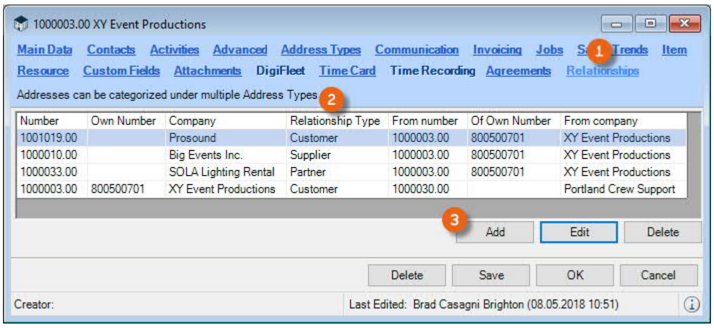
Creating agreements for an Address:

1. easyjob Menu ➜ View ➜ Addresses
2. Select an address
3. ➜ Edit
4. ➜ Agreements tab
5. Enter the desired content
6. ➜ Save

In User settings you can assign a right to View and/or Edit Agreements.

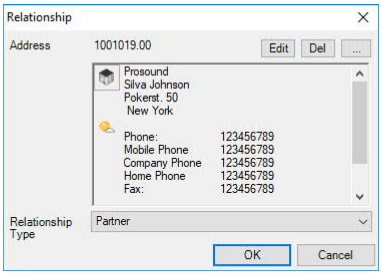
Relationships

Addresses that have a particular relationship with each other can be recorded in the Address Master Data on the Relationships ① tab. You can define the type of relationship (e.g. Supplier, Customer, Partner, etc.) ② in the Master Data. Create a new relationship with Add ③.



Creating relationships for an Address:

1. easyjob Menu ➜ View ➜ Addresses
2. Select an Address ➜ Edit
3. ➜ Relationships tab ➜ Add
4. Enter the Address and the Relationship type



5. ➜ Ok

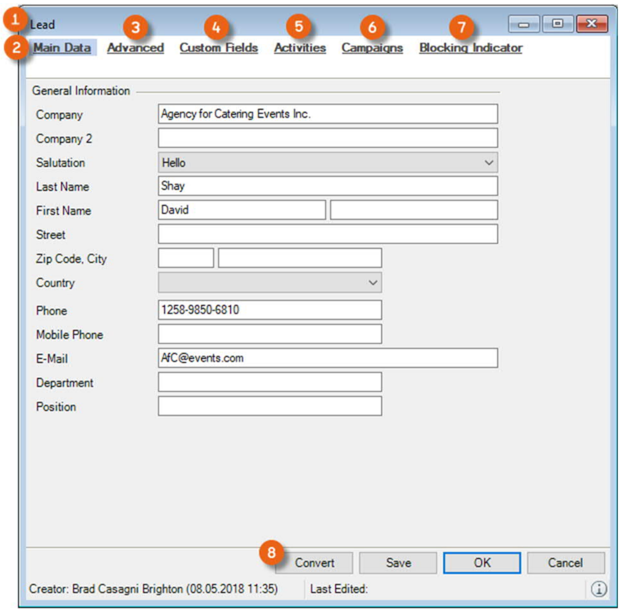
The Relationship Type and Address on which the relationship is based are also entered in the Address Master Data for the selected Address.

Creating a Relationship Type in the Master Data

1. easyjob Menu ➜ Master Data ➜ Relationship Type
2. ➜ Add
3. Enter a Name
4. ➜ Ok

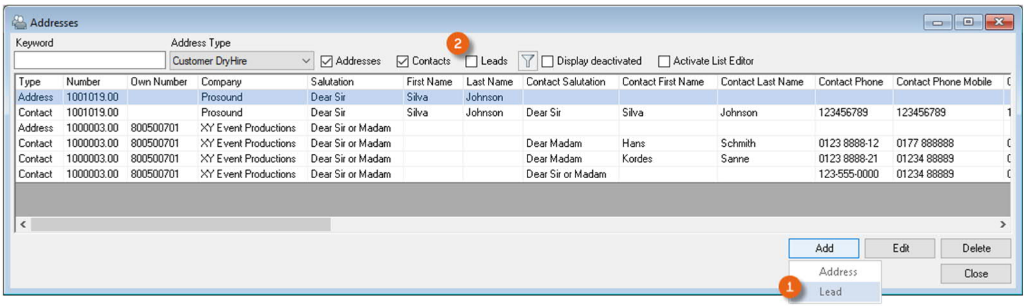
Leads

Before you create a potential customer (e.g. an interested person at a trade show) in detail in your Address Master Data, you can enter him as a Lead ① in easyjob. On the Main Data ②, Advanced ③, Custom Fields ④, Activities ⑤, Campaigns ⑥ and Blocking Indicator ⑦ tabs, you can use many CRM functions also for the Lead. If this lead becomes a customer, then the lead can be Converted ⑧ to the Address Master Data.



Creating a lead:

1. easyjob Menu ↪• Master Data ↪• Addresses
2. ↪• Add



3. ↪• Lead ①
4. Enter the information
5. ↪• Save

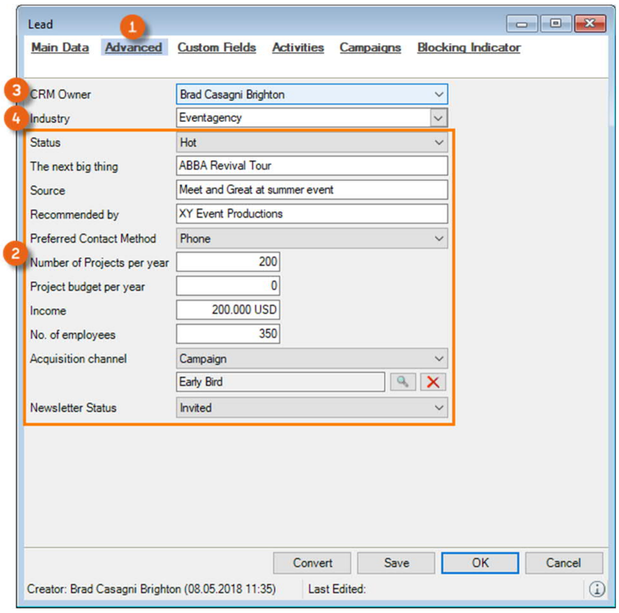
In your Address Main Data, you can not only by Addresses and Contacts, but also by Leads ②.

Main Data

Enter general information as well as communication details (e.g. CRM Owner) in the Main Data.

Advanced

The Advanced ① tab contains the same fields found on the CRM Advanced tab ② for an Address. In addition, you can enter the CRM Owner ③ and the Industry ④.

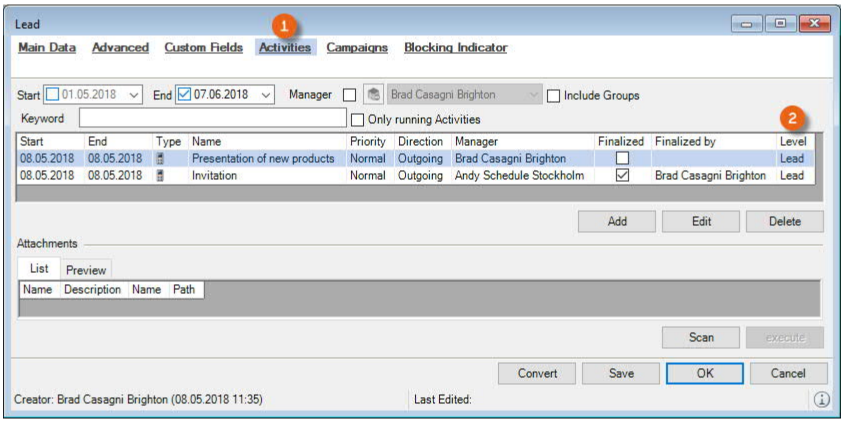


Custom Fields

The Customer Fields are identical to those for the Address Master Data.

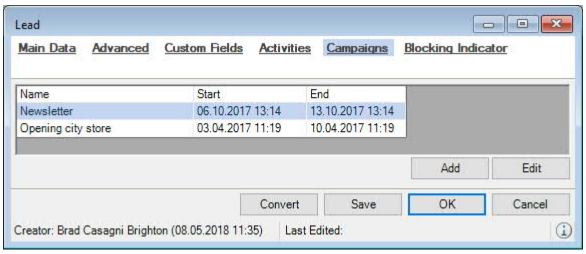
Activities

Here you can find an overview of the Activities ① assigned to this lead Address. The content of the Activities tab is analogous to the Address Master Data. The Level ② column indicates if it is a Lead, Contact or Address.



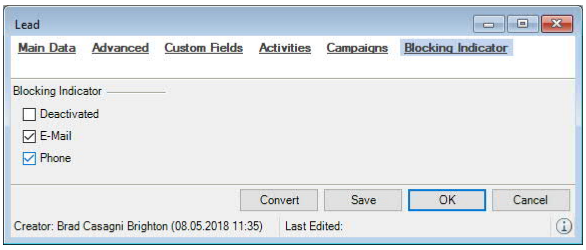
Campaigns

The campaign information is identical to the information in the Address Master Data.



Blocking indicators

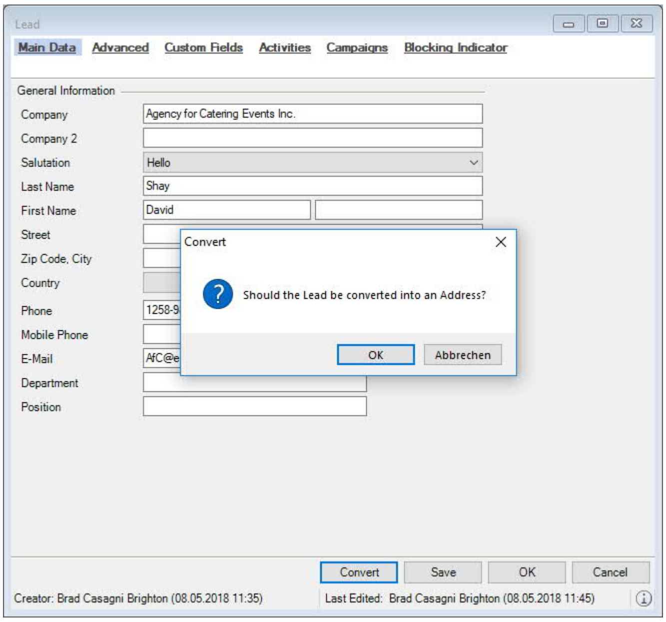
You can activate the same Blocking indicators in the Lead as in the Contact. See also Contacts and Blocking indicators.



Converting a Lead into an Address

Converting a lead:

1. easyjob Menu Master Data Addresses
2. Select the Lead
3. Convert



4. Ok
5. Enter any additional information for the Address
6. Save

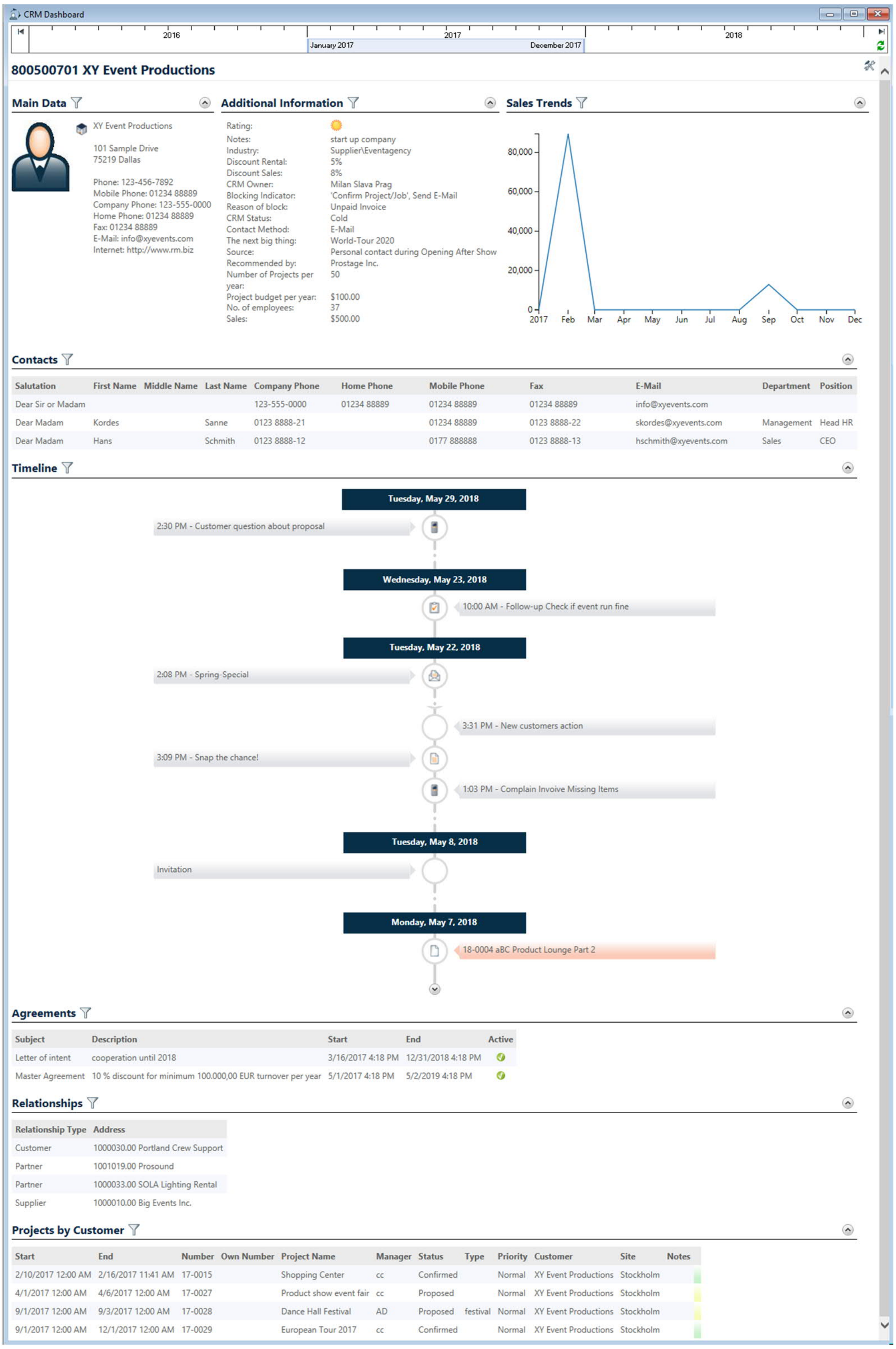
When you create a Project and select a Lead as the customer for it, it is automatically converted into an Address.

Leads in the Dashboard

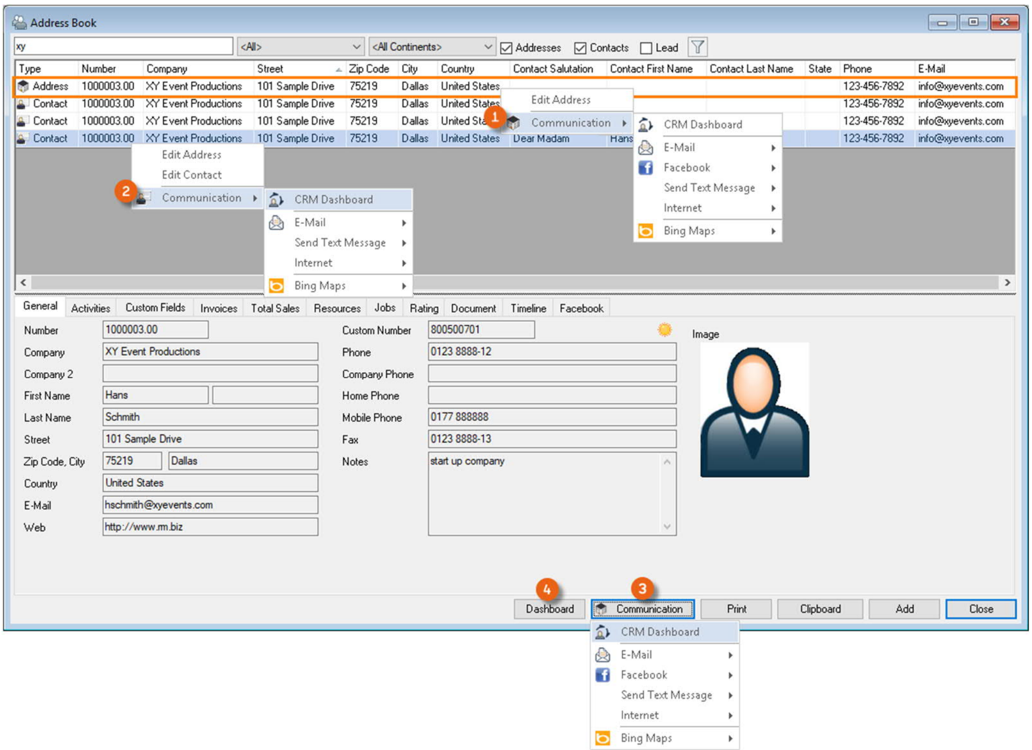
The CRM Dashboard is also available for Leads. You can display the Address Main Data, Activities, Timeline, Advanced Information, Campaigns and Events. More information can be found in Dashboard.

Dashboard

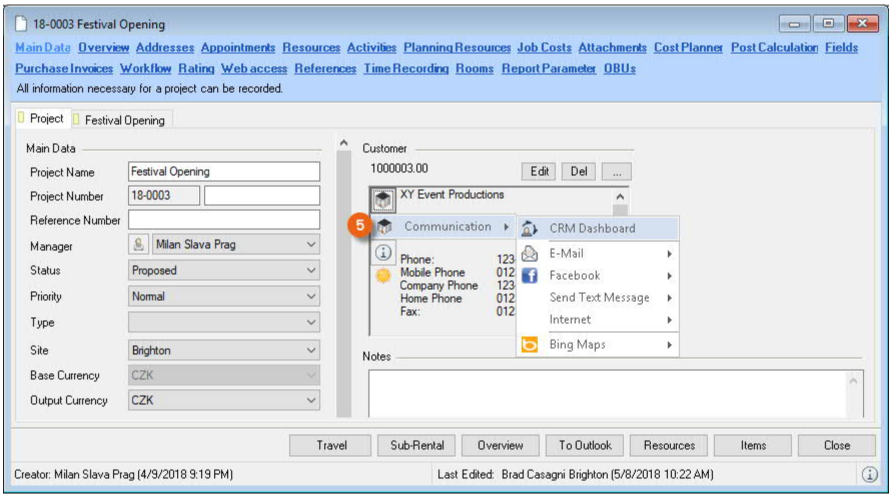
With the CRM dashboard you are informed about all processes of a selected address. You can see all information and data about your customer at a glance.



You can open the CRM Dashboard via the context menu (right mouse click) of the Address ① or the Contact ②. You can also access the CRM Dashboard via the Communication menu ③. You can also open it directly ④ in the Address Book.



In nearly all points in easyjob where an Address or a Contact is used, you can open the Communication menu with the right mouse button. For example, in the Project ⑤.



Opening the Dashboard:

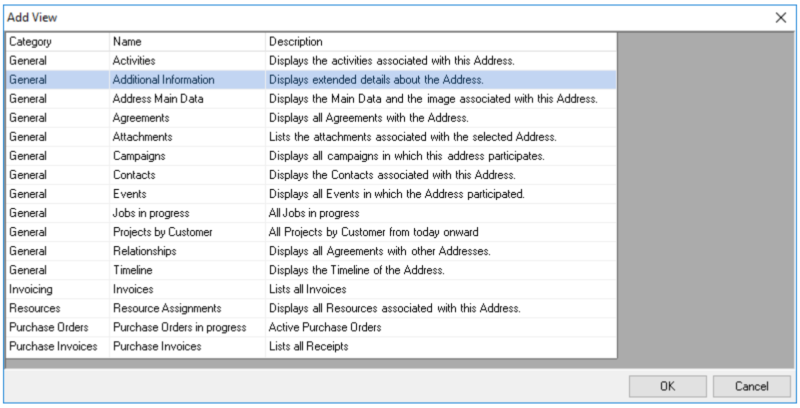
1. easyjob Menu View Addresses
2. Select an Address/Contact
3. Right mouse button Communication
4. CRM Dashboard

or

3. Dashboard button

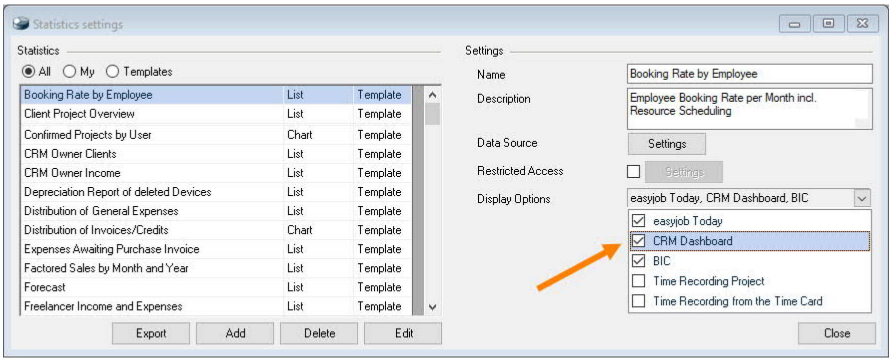
Customizing the Dashboard

Many Settings are possible on the Dashboard. You can specify individually what information should be displayed in which point and which filter should be used. Many Views are available by default.



Reports from the Business Information Center

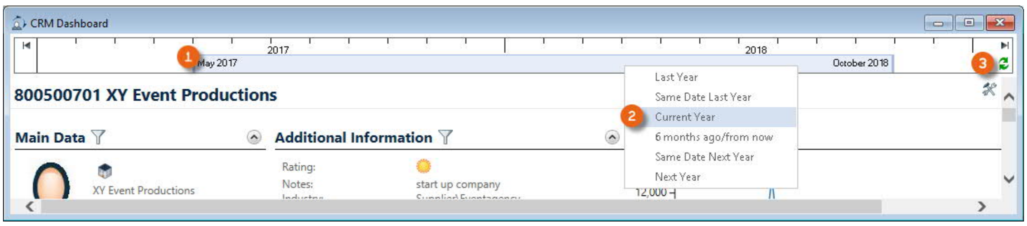
If you use the Business Information Center, you can group the individual reports and display them on the CRM Dashboard.



More information can be found in easyjob Business Information Center manual.

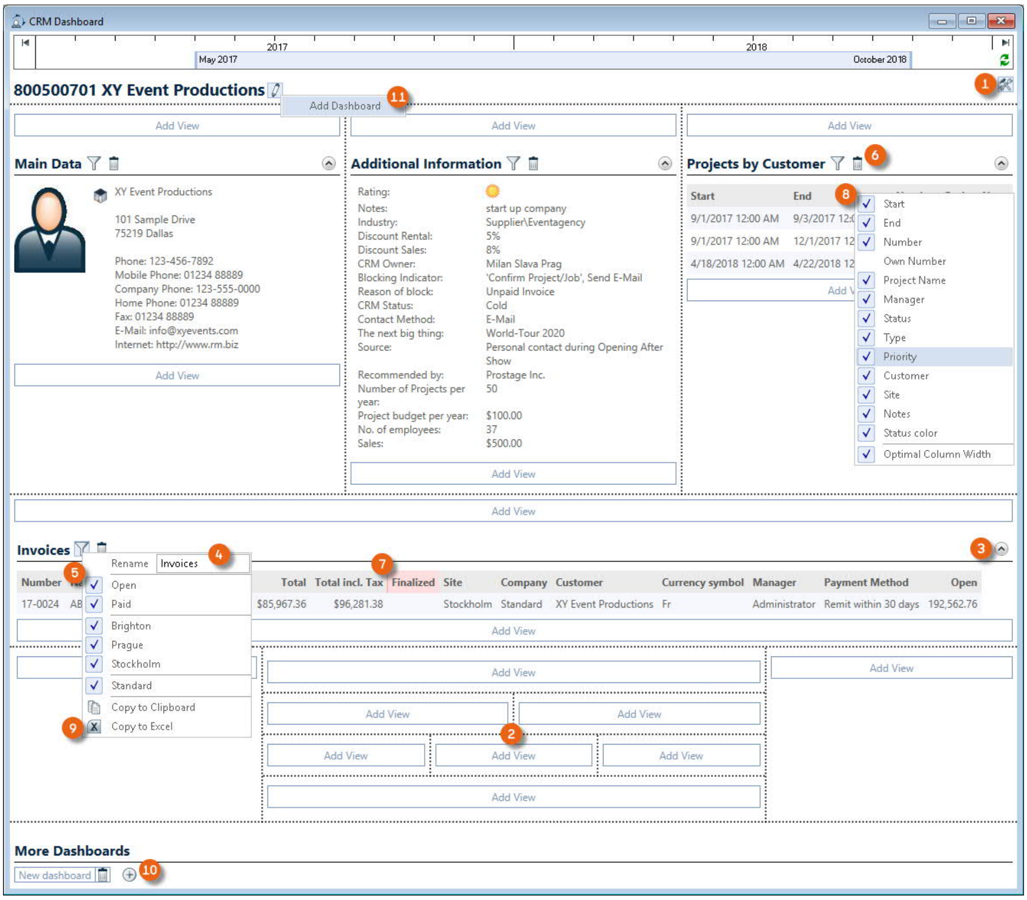
Time Frame

With the Time Frame, you can define the start and end time of your time frame related reports (e.g. Invoices). The report always starts on the first day of the indicated month and ends on the last day of a month. With the left mouse button ① you can push the time bar to the desired Line Item or use the items (e.g. Current Year, etc.) available in the drop-down menu ②. Press the Refresh button ③ to update your selected Views for the set time frame.



You selected the time frame 'Same Date Last Year', your report starts on the first day of the current month one year ago (e.g. March 1, 2017) and ends on the last day of the last month (February 28, 2018) of the year time frame. From March 2017 until March 2018 means March 1, 2017 until February 28, 2018.

Settings mode



After switching to Settings mode ① you can freely order your information screen within the Matrix ②. It is possible to Open and Close ③ as well as Rename ④, Filter ⑤ and Delete ⑥ views. You can move the Columns ⑦ as required and display or hide ⑧ them. The data for all Views can be copied to the Clipboard or to Excel for further use ⑨. If required, more Dashboards can be created ⑩. All the Information displayed in your Dashboard will be calculated in real time when opening the CRM Dashboard or when performing a Refresh. You can add as many Dashboard pages ⑩ ⑪ as you wish.

Inserting, ordering and filtering Dashboards as needed:

1. easyjob Menu ⇨ View ⇨ Addresses
2. Select an Address/Contact ⇨ Dashboard button
3. Switch to the Setting mode
4. Select the desired position within the matrix and add a view from the selection list.
5. ⇨ Ok
6. Modify the settings (rename, filter, columns, etc.)
7. Leave the settings mode

All the settings you make on the CRM Dashboard always apply for all Users.

You can manage the general use of the CRM Dashboards with the User settings .

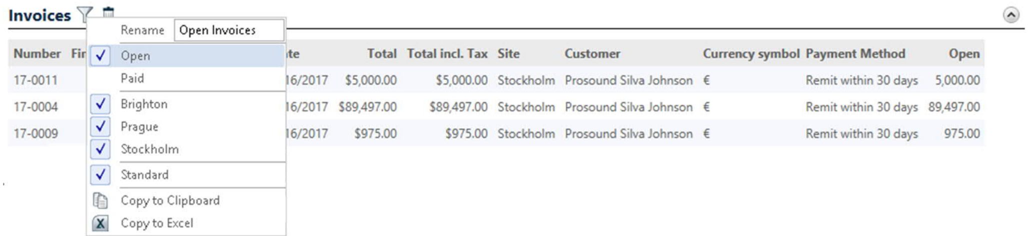
Dashboard Views

On the CRM Dashboard, it is possible to display many views from the General, Invoicing, Resources, Purchase Orders and Statistics categories.

You can add a View multiple times, filter it by different characteristics and rename it accordingly (e.g. Open Invoices - Paid Invoices)

Renaming Views:

1. easyjob Menu ⇒ View ⇒ Addresses
2. Select an Address/Contact ⇒ Dashboard button
3. Switch to the Setting mode
4. Click the filter symbol of a View
5. Set the desired filter (e.g. open)
6. Enter a new Name



7. Confirm the new name with the Return key
8. Leave the Setting mode

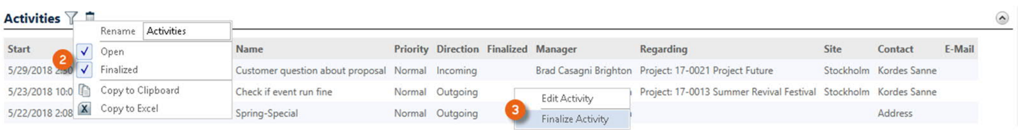
Address Main Data

It shows the main data and a picture for an Address.

No other filters. The Communication menu ① can be started directly from the Dashboard.

Activities

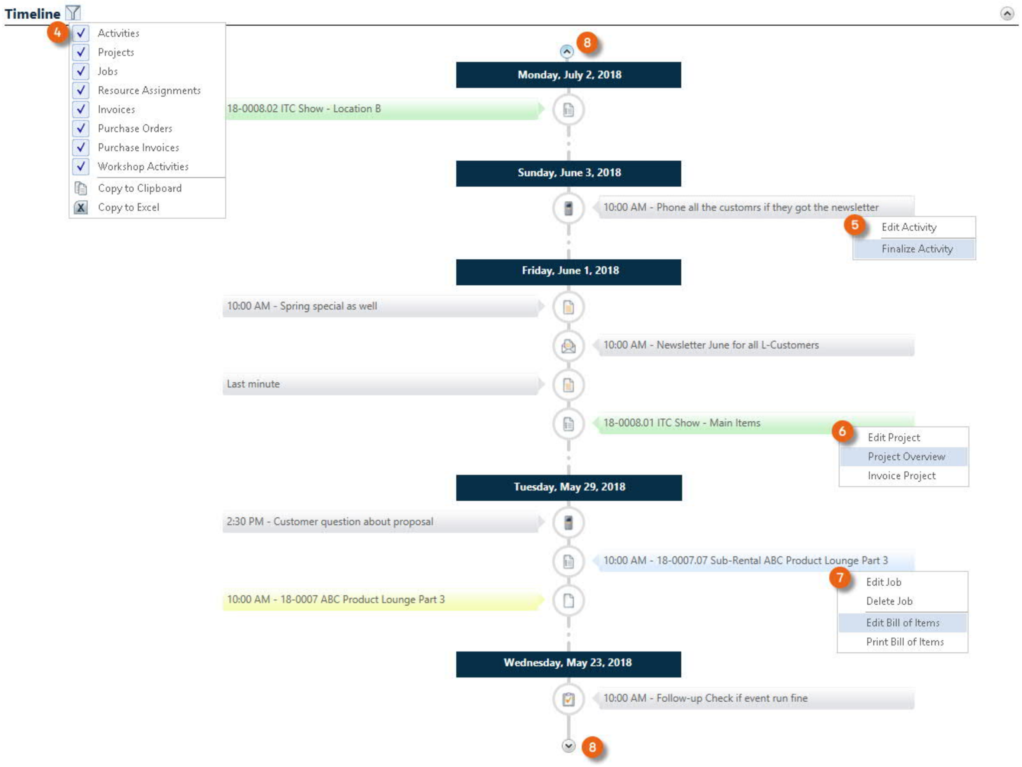
This displays the Activities for the selected Address.



Filter by Open and Finalized Activities ②. In the Context menu ③ you can set an activity as finalized or open an activity to edit it

Timeline

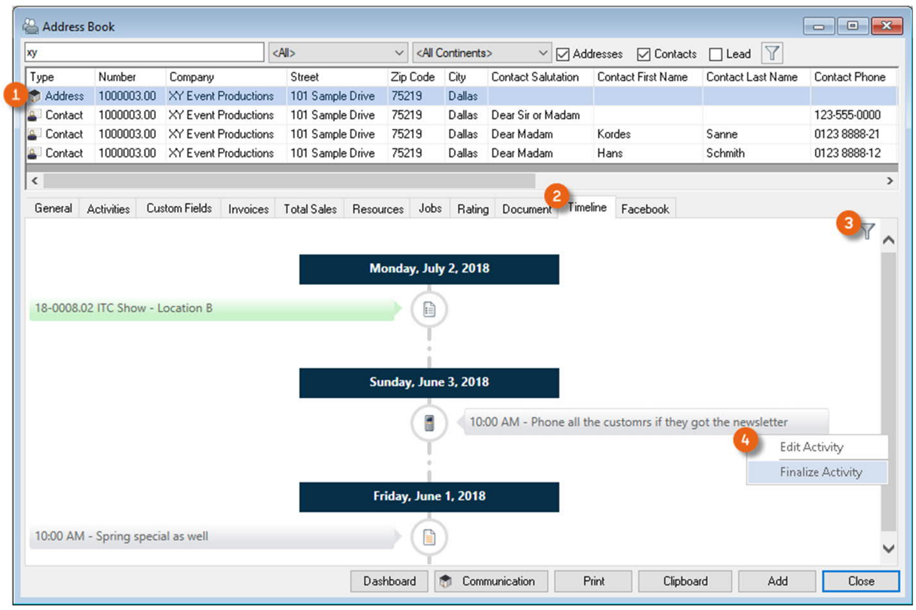
This displays the timeline for the Address.



Filter by Activities, Projects, Jobs, Resource Assignments, Invoices, Purchase Orders and Workshop Activities ④. In the Context menu ⑤ you can set an activity as finalized or open an activity to edit it. Various actions can be selected from the Context menu for Projects ⑥, Jobs ⑦, etc. The time bar for the timeline can be pushed into the past or the future ⑧.

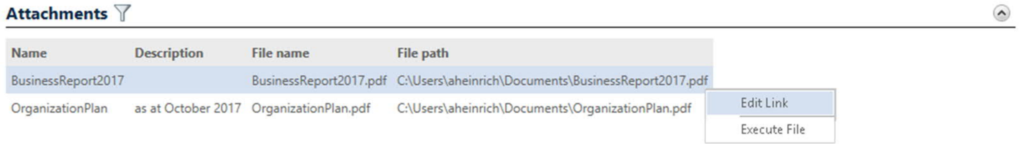
Timeline in the Address Book

The timeline is also available in the Address Book. Just like for the Dashboard, after selecting the Address ① you can view the Activities, set Filters ③ or directly edit Activities ④ on the Timeline ② tab.



Documents

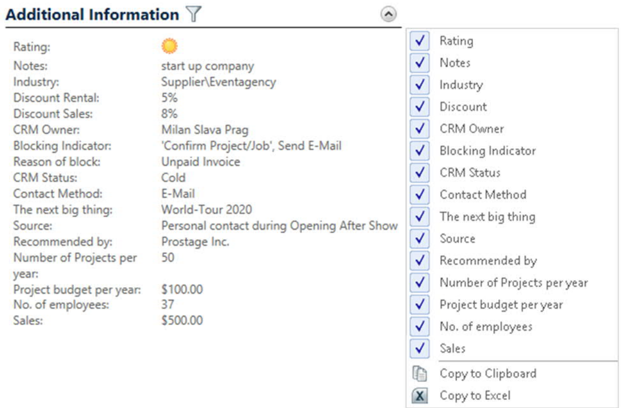
This lists all of the documents attached to the selected Address.



The document can be edited or executed via the Context menu.

Additional Information

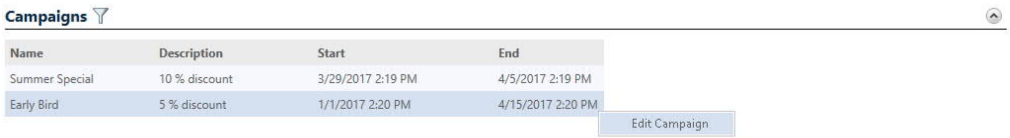
This shows additional details about the Address.



All additional information can be displayed or hidden by means of a filter.

Campaigns

This lists all Campaigns in which this Address participates.

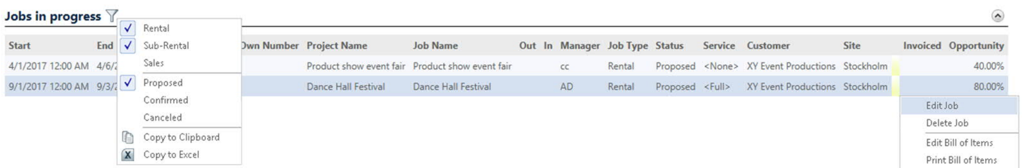


Contacts

This shows the Contacts for the selected Address.

Jobs in progress

All Jobs in progress at the moment.



Filter by Rental, Sub-Rental, Sales, Proposed, Confirmed and Canceled. Various actions can be selected for the Job in the Context menu.

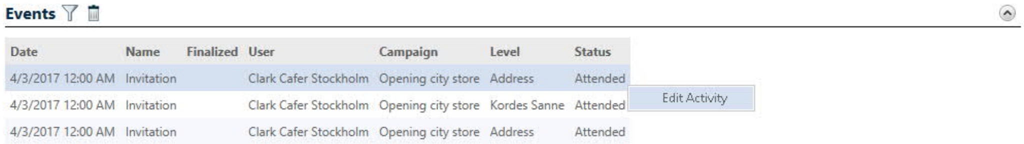
Projects by Customer

All Projects from today for a customer.

Filter by Rental, Sub-Rental, Sales, Proposed, Confirmed and Canceled. Various actions can be selected for the Project in the Context menu, depending on the status.

Events

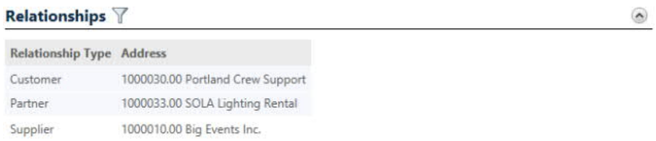
This lists all the Events to which the Address was invited.



The Event activity can be edited via the Context menu or by double clicking it directly on the Dashboard.

Relationships

This lists all relationships with other Addresses.



Agreements

It shows all existing agreements with the customer.

The agreement can be edited via the Context menu or by double clicking it directly on the Dashboard.

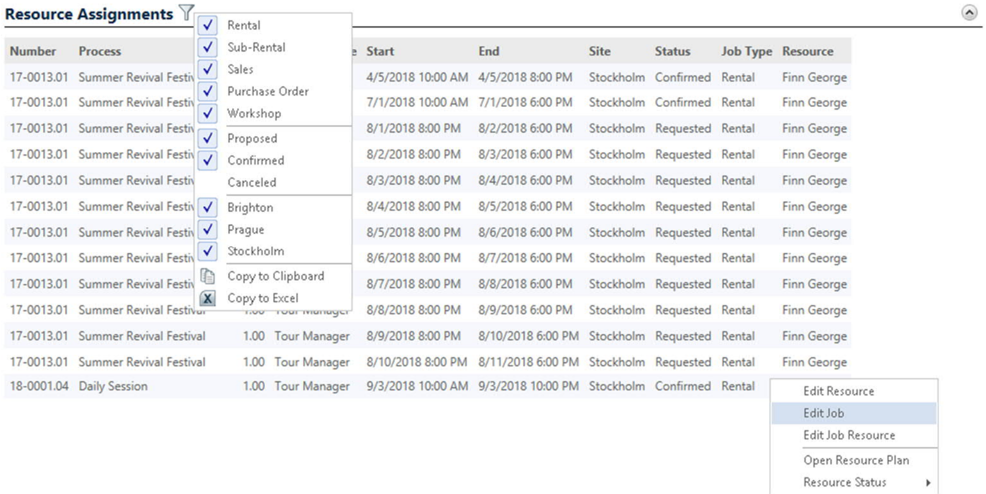
Invoices

This lists all invoices

Filter by Open and Paid. The invoice can be edited via the Context menu or by double clicking it directly on the Dashboard.

Resource Assignments

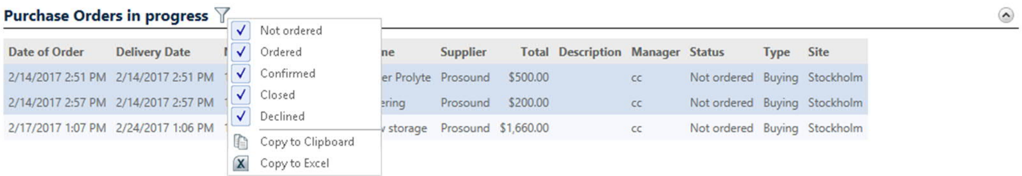
This displays all resources that are assigned to the Address.



Filter by Rental, Sub-Rental, Sales, Purchase Order, Workshop, Proposed, Confirmed and Canceled. The Resource or Job can be edited via the Context menu or by double clicking it directly on the Dashboard.

Purchase Orders in progress

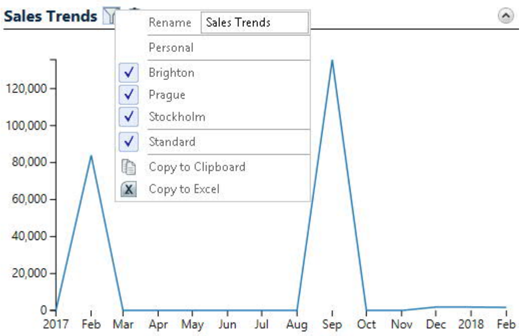
All Purchase Orders currently in progress.



Filter by Not ordered, Ordered, Confirmed, Closed and Declined. The Purchase Order can be edited via the Context menu or by double clicking it directly on the Dashboard.

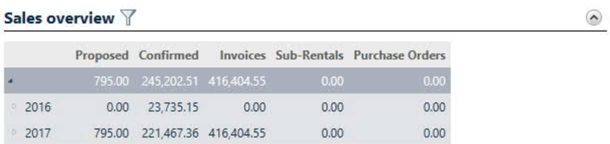
Sales Trends

This shows the Sales Trends for the selected period as a chart.



Sales overview

This shows the Sales Trends for the selected period as a table.

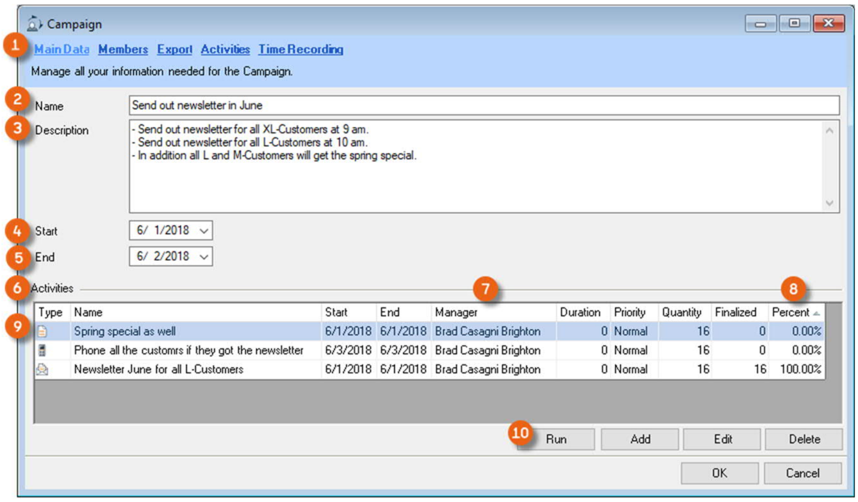


Campaign

CRM campaigns help you with customer actions such as events, mailings, show invitations by mail and telephone actions. Target groups can be created using marketing lists with special filters, and then reused. Using the export functions, the data can be transferred to Excel to create form letters, for example, or to transfer data to a mailing program.

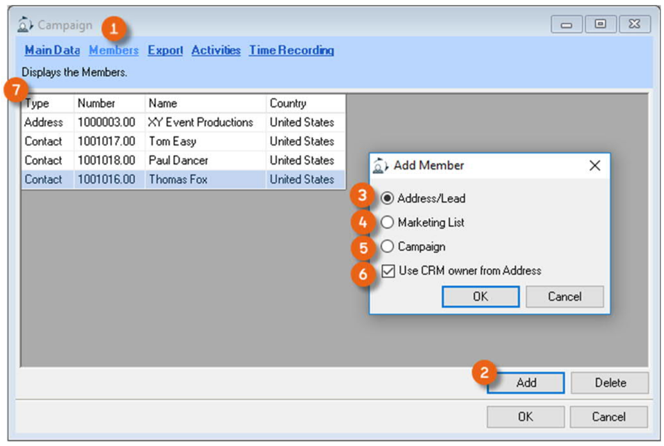
Main Data

Enter a Name ② and a Description ③ in the Main Data ① of a campaign. You can enter a Start ④ and End ⑤ date. As soon as you have added members to your campaign, you can Add, Edit or Delete ⑥ them for the activities required for the campaign. The overview shows the Manager ⑦ and the Status ⑧ of the activity as a quantity and percentage. Document ⑨ and E-mail activities can be set up here and applied to all participants by pressing Run ⑩.



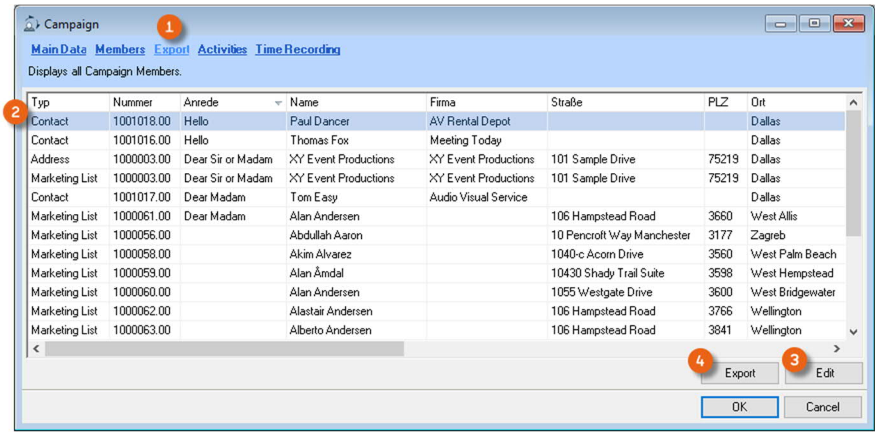
Members

On the Member ① tab, you can specify the Addresses that should be used for this campaign. With Add ② you can use individual Addresses or Leads ③, Marking Lists ④ or Addresses from existing campaigns ⑤. By checking the box, the respective CRM Owner ⑥ will be taken from the Address for already existing activities. You can see your selection in the Overview ⑦. See also Marketing Lists.



Export

All selected Members ② are displayed under Export ①. Individual Addresses can be edited ③ if required and then the displayed list can be exported for further use (e.g. Word form letter) to an Excel file ④.

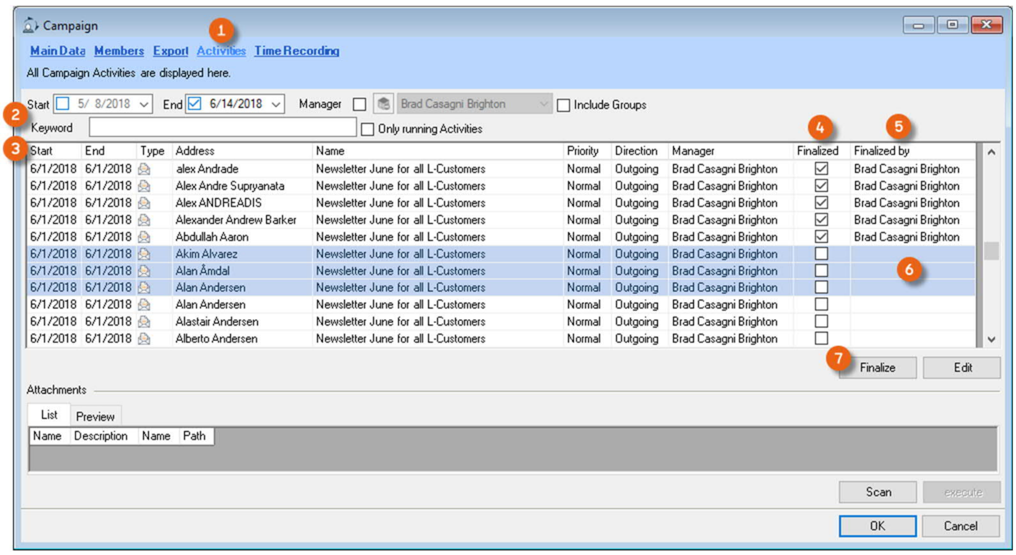


Exporting the Member List:

1. easyjob Menu ⮊ CRM ⮊ Edit campaign
2. Select a campaign
3. ⮊ Ok
4. ⮊ Export
5. Define the storage location and assign a file name
6. ⮊ Save

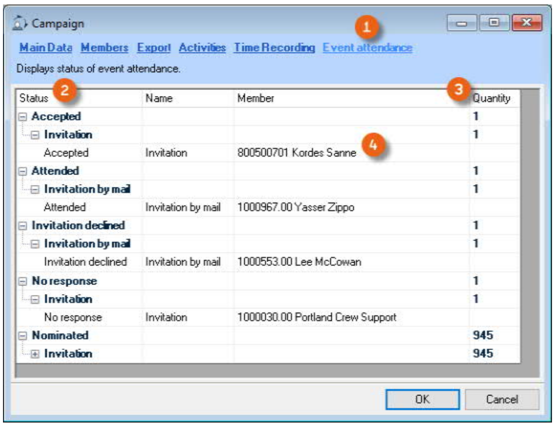
Activities

All the individual campaign Activities ③ are displayed on the Activities ① tab. You can limit your selection with the Filter options ②. You can see which activities have been Finalized ④ and by whom ⑤. You can select multiple Activities ⑥ and finalize them together ⑦.



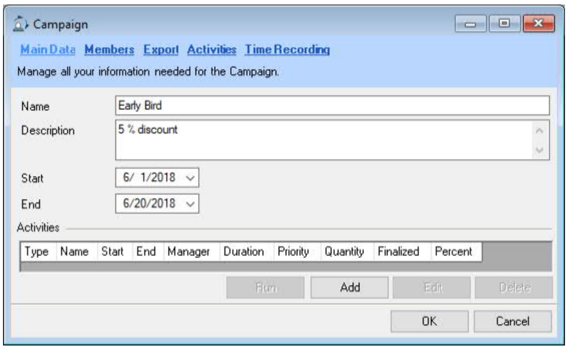
Event attendance

You can create the organization of an Event with a campaign. As soon as you create an Event type activity, a tab is created in the campaign called Event attendance ①. There you can see an overview with the Status ② of your Invitations, the corresponding Quantity ③ and the names of the Participants ④.

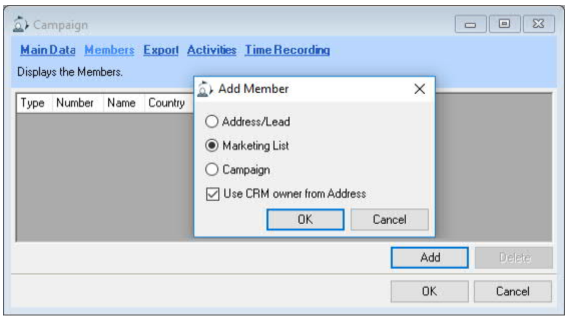


Creating a campaign

1. easyjob Menu ↪ CRM ↪ Create campaign
2. Enter a Name and a Description, if necessary.
3. Enter a start and end date



4. Select the Members tab
5. ↪ Add
6. Select the members from Addresses/Leads, Marketing Lists or existing Campaigns ↪ Ok



7. Select the desired list ↪ Ok
8. ↪ Main Data
9. ↪ Add
10. Create the activity (e.g. Event)
11. Enter the data (e.g. Send invitation)
12. Save

Editing or starting a campaign

You can edit individual campaign activities or start a campaign with Run, starting all activities (Document or E-mail type) for the selected addresses.

Editing individual campaign activities:

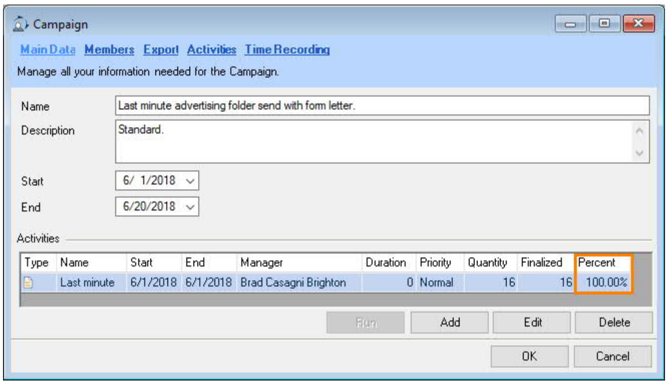
1. easyjob Menu ➪ CRM ➪ Edit campaign
2. Select a campaign
3. ➪ Ok
4. ➪ Activities
5. Select the activity with the corresponding Address
6. ➪ Edit
7. Enter any necessary information
8. Check the Done box

Starting a campaign activity:

1. easyjob Menu ➪ CRM ➪ Edit campaign
2. Select a campaign
3. ➪ Ok
4. Select the activity you want to Run.
5. ➪ Run

You can only completely start one campaign activity. If you have already edited individual activities, this is no longer possible.

After clicking Run, the activity is carried out for all addresses and the individual activities are set to Done. The main data overview shows these activities as 100% finalized.

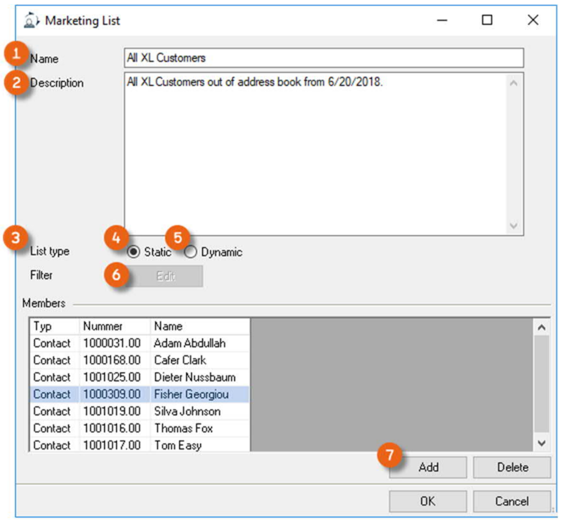


For a mailing action (newsletter, etc.), we recommend entering the data (content, participants) in an easyjob campaign, exporting the Addresses and sending the data to a suitable newsletter tool.

Marketing Lists

With marketing lists, you can prepare the target groups for your campaigns. The marketing lists can be static or dynamic. Static marketing lists are assigned manually to addresses and contacts. With dynamic marketing lists, addresses and contacts are created on the basis of data filters. In this way, you can create a target group with type-M customers. If you open this filter again after a certain period of time, the changes to this member group (new M-customers that were previously not on the list or previous M-customers that are no longer M-customers) will be displayed and you can adjust the list.

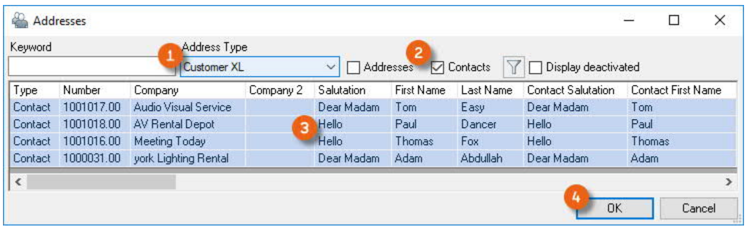
When creating a market list enter a Name ①, Description ②, if it is a Static ④ or Dynamic ⑤ List type ③, and for dynamic lists, a Filter ⑥. Select the Address with Add ⑦.



Static Marketing Lists

Creating a Marketing List:

1. easyjob Menu Master Data Marketing lists
2. Add
3. Enter a name/description (e.g. all XL-customer contacts)
4. Static list type
5. Add

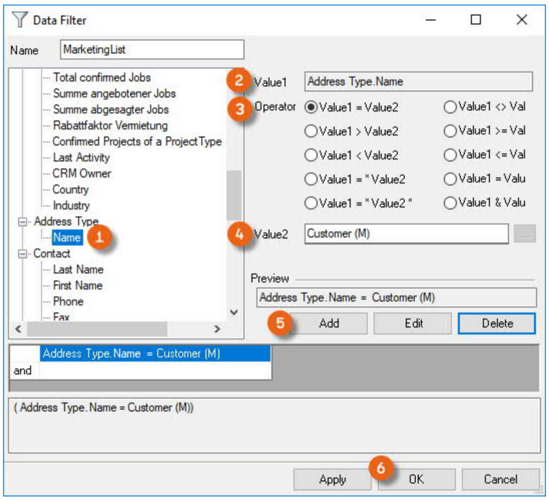


6. Limit the selection, for example with Address Type ① and Contacts ②
7. Ctrl + A ③
8. Ok ④
9. Ok

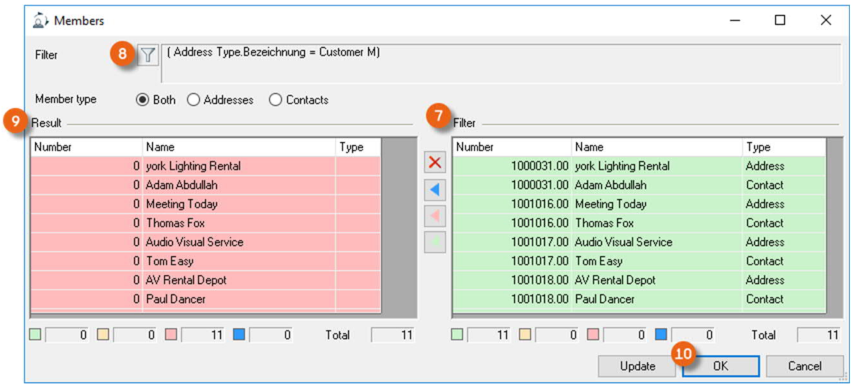
Dynamic Marketing Lists

Creating a Marketing List:

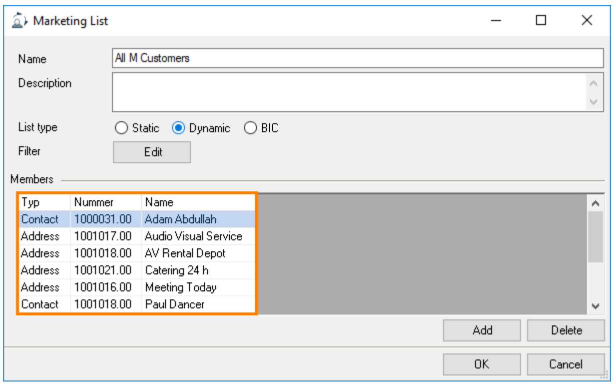
1. easyjob Menu Master Data Marketing lists
2. Add
3. Enter a name/description (e.g. all M-customers)
4. Dynamic list type
5. Filter Edit
6. Filter symbol Edit
7. Define the filter by defining Value1 ② (e.g. Address Type.Name), the Operator ③ and Value2 ④ (e.g. Customer (M)) from the Selection ① .



8. Add ⑤ Ok ⑥



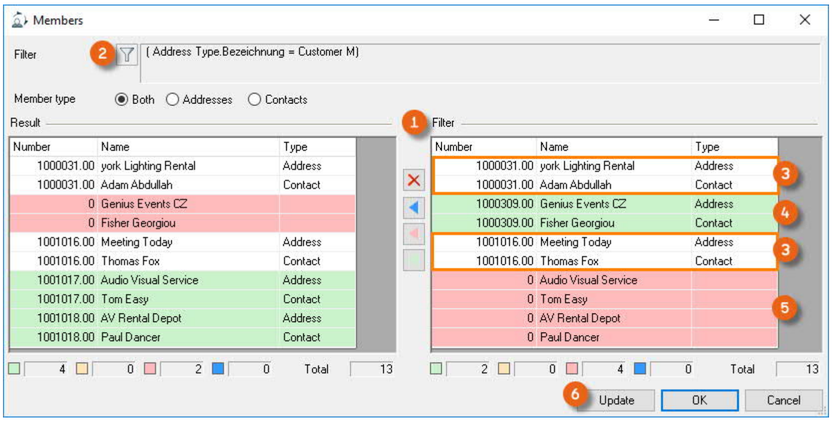
9. The utilized Filter ⑧, is shown on the right ⑦ and the Result ⑨ is shown on the left
10. Apply and Ok ⑩
11. The list is generated and the result is displayed



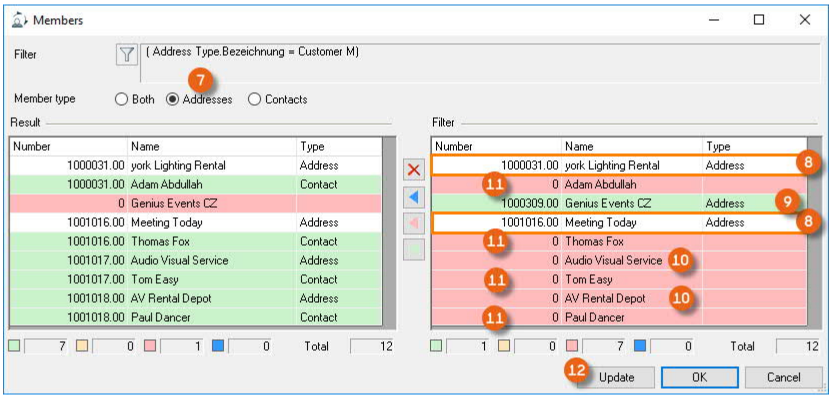
Before you can start a campaign with the dynamic marketing list, you can check if anything has changed with the member group (e.g. there is a new M type customer, or customers who are no longer M type customers, or you would like to use the main contact for the Address and not the individual Contacts).

Editing the dynamic marketing list:

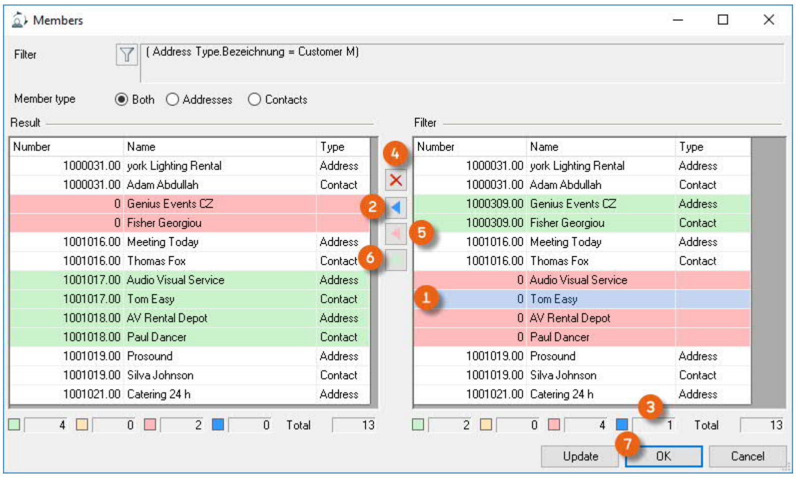
1. easyjob Menu ↬• Master Data ↬• Marketing lists
2. Select the list to be edited (e.g. all M-customers)
3. ↬• Edit
4. Filter ↬• Edit



The right side of the table ① displays the set Filter ② , the Addresses and Contacts that fit the Customer M Filter. All Rows ③ that are not selected contain data that still apply to the filter like before. Rows that are marked green ④ were added new to the right side and are Customer Type M, they are not displayed on the left side and are therefore marked in red. The Addresses marked in red and the corresponding Contacts on the right side ⑤ are no longer M-type customers and are marked in green on the left. With this color coding, you can check the filter and the changes and perform an Update ⑥ or continue customizing the list.



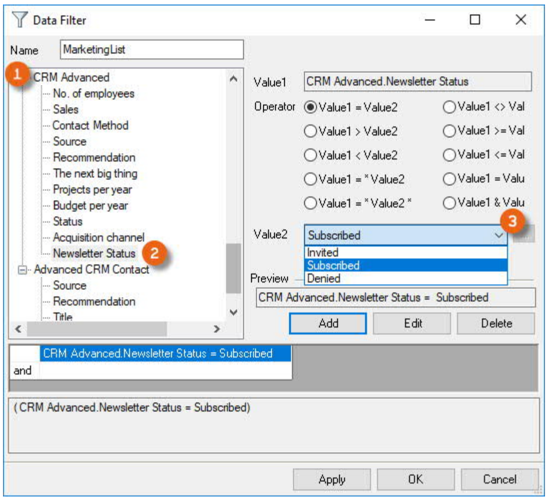
If, for example, you want to use only Addresses and no Contacts in your marketing list, select the Member type (in this example, Addresses ⑦). The filter will be used and displays which Addresses were originally in the list and still apply for the filter ⑧, Addresses that were newly added are marked in green ⑨, Addresses that are no longer M-type customers are marked in red ⑩, all available Contacts are also marked in red ⑪, so the list is only filtered by Addresses. Update ⑫ generates the list.



In order to customize the suggested filters further to your needs, you can update the data in the result list in blocks or update the items individually or delete them. The color coding makes it easier to customize the marketing list. You can mark a row ① for example and add it to the result list using the blue arrow ②. For a better overview, the number of currently selected rows is displayed ③, as you can use the Ctrl key to select multiple entries at the same time and add them to the result list. You can select existing entries and remove them completely from the selection ④. If you still want to keep the red marked Addresses and Contacts, which in this current example are no longer M-type customers, in the marketing list, add all red marked rows with the red arrow ⑤ back to the result list. After you have checked the newly added M-type customers, and deleted any Addresses you do not want, you can move them to the results list them with the green arrow ⑥. Ok ⑦ generates the desired list.

Newsletter Status

With the help of the dynamic marketing lists, you can add a filter about the Newsletter Status ② in the CRM Advanced ① category and only use customers with a Subscribed ③ Newsletter Status in the Item Master Data.



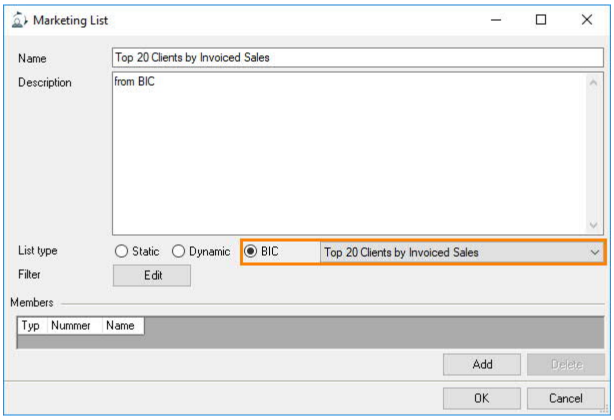
See also CRM Advanced.

Marketing Lists from the Business Information Center

Marketing lists can also be created based on a statistic from the Business Information Center. In this way you can preselect based on the customer segment, sales during a certain period, the customer's language, rating, the newsletter recipient and much more.

Creating a marketing list from the BIC:

1. easyjob Menu ↪ Master Data ↪ Marketing lists
2. ↪ Add
3. Enter a name/description (e.g. all M-customers)
4. ↪ BIC list type
5. Select a Statistic



6. Filter ↪ Edit

Proceed in the same manner as for dynamic marketing lists. Alternatively, you can edit the selected statistic from the filter view.