



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.

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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.

Special keys

Special keys are represented with the following symbols:

	Windows key
	Tabulator key
	Arrow keys
	Return key
	Context Menu key
	Escape key
	Function key 1
 + A	Control key. Keep the control key pressed down and press the A button.
 + H	Alt key. Keep the Alt key pressed down and also press the H button
	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.

Invoices

From: 15/01/2017 To: 14/02/2017 Keyword: Customer: Type: All Status: <All> Reminder Status: Site: M

Number	Name	Invoice Date	Total	Total incl. Tax	Name1	Status	Paid	Terms of Payment	Open
13-0006	Big Show	27/04/2015	€36,000.00	€36,000.00	Big Events Inc.	Open	<input type="checkbox"/>	Big Project Payment Plan	€36,000.00
13-0008	Downtown Art Exhibition	27/04/2015	€16,650.00	€17,899.50		Open	<input type="checkbox"/>	Big Project Payment Plan	€17,899.50
12-0007	Big Opening Shopping Mall 1b	14/04/2016	€7,150.00	€7,865.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€7,865.00
12-0004	Big Opening Shopping Mall 2	14/04/2016	€7,150.00	€7,865.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€7,865.00
12-0006	Big Opening Shopping Mall 1a	14/04/2016	€7,150.00	€7,858.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€7,858.00
12-0008	Big Opening Shopping Mall 1c	14/04/2016	€6,300.00	€7,049.00		Open	<input type="checkbox"/>	Remit within 30 days	€7,049.00
12-0001	Repair	29/03/2016	€1,160.10	€1,170.21		Open	<input type="checkbox"/>	Pre-paid by credit card	€1,170.21
02-0001	Sample Project	26/11/2012	€492.00	€492.00	Max Sample Customer	Exported	<input type="checkbox"/>	Remit within 30 days	€492.00
10-0001		21/04/2015	€1.00	€1.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€1.00
13-0009		27/04/2015	€0.00	€0.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€0.00
13-0007	CATS Revue	27/04/2015	€0.00	€0.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€0.00
13-0005	Big Show	27/04/2015	€0.00	€0.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€0.00
Totals	Quantity	17	Total	€82,053.10	Total incl. Tax	€86,199.71			

Print Add Edit Close

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.

CRM

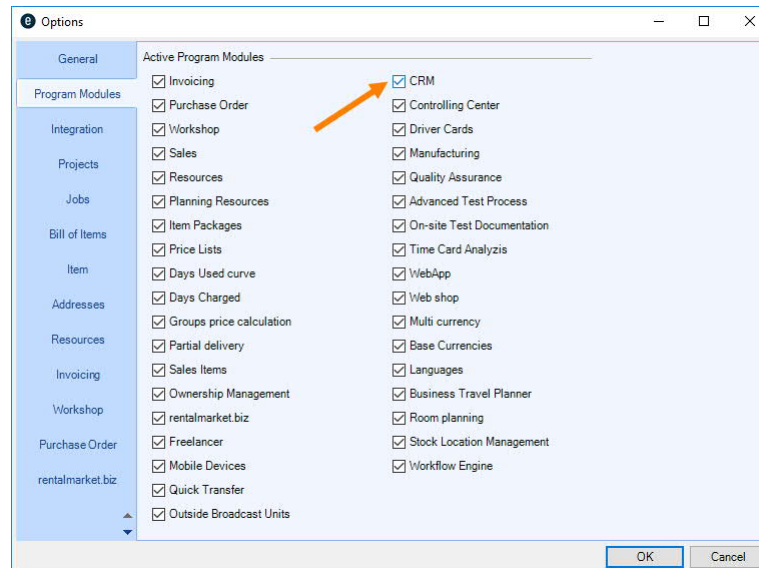
The easyjob CRM (Customer Relationship Management CRM) module helps you optimize your communication with customers, partners and suppliers. You can directly address your customers with activities, campaigns and marketing lists. With the CRM Dashboard, you can provide your Sales Team with a wide range 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.

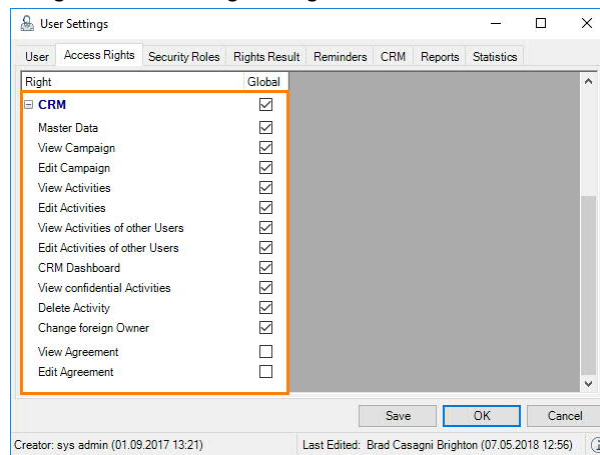
Configuration and settings

User settings

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

Assigning the user rights for CRM:

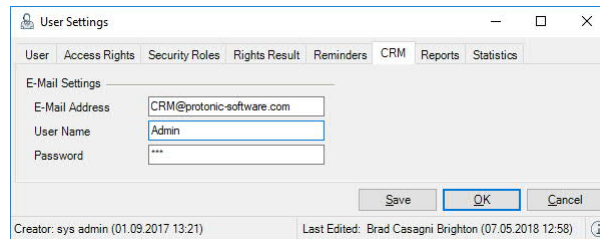
1. easyjob Menu ➞ Tools ➞ Manage Users
2. ➞ Select a User
3. ➞ Edit
4. ➞ Access Rights tab
5. ➞ General
6. Assign the desired rights (e.g. view confidential activities or agreements, etc.)



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:

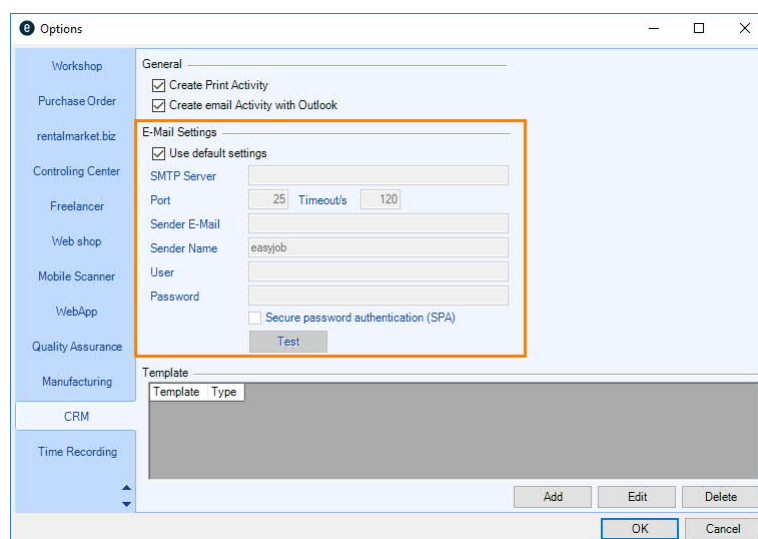
1. easyjob Menu ➤ Tools ➤ Manage Users
2. ➤ Select a user ➤ Edit
3. ➤ CRM tab
4. Enter the e-mail settings
5. ➤ Save
6. ➤ Ok

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:

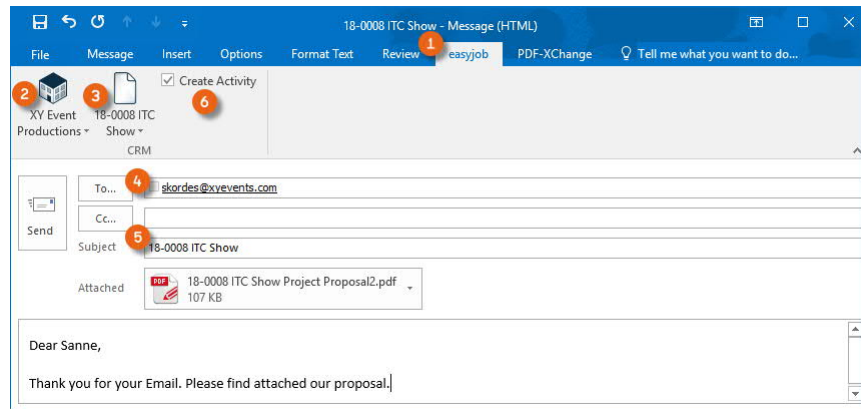
1. easyjob Menu ➤ Tools ➤ Settings
2. ➤ CRM tab
3. Enter the corresponding data under email settings
4. Use Test to test the account settings.
5. ➤ Ok



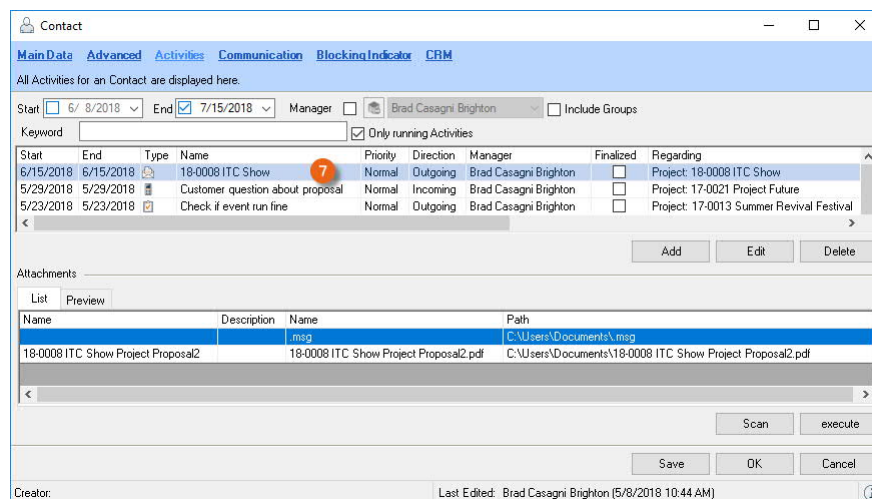
easyjob must be restarted to activate the settings.

Email activities using Outlook

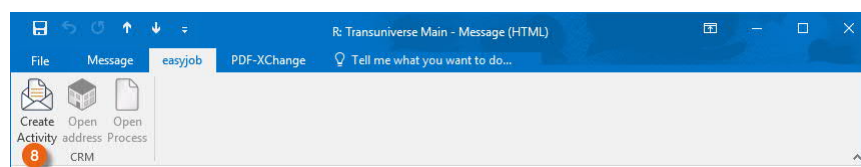
You can use the CRM email toolbar to create various email activities directly via Outlook. When creating a new email, you can assign Addresses ② and Processes ③ (see also [Activities in the reference type](#)) from easyjob on the easyjob tab ①. The selected email address and the name of the workshop 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.

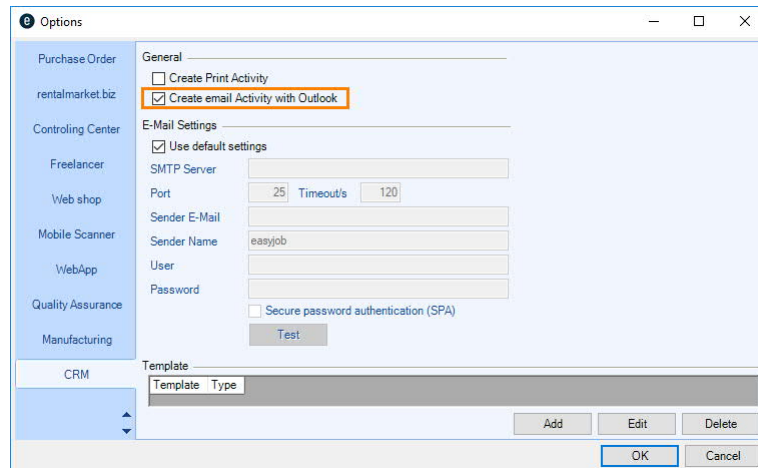


When you receive an email, you can create a new Activity ⑧ from it directly.



Setting up the CRM email tool:

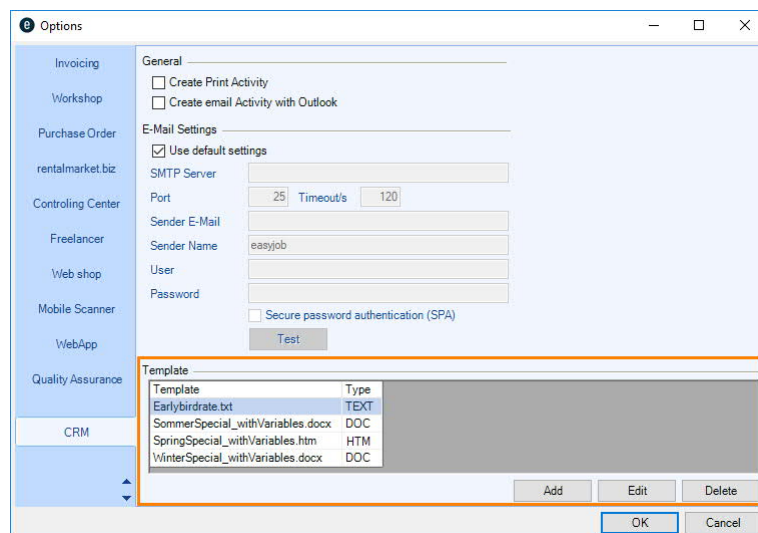
1. easyjob Menu ➡ • **Tools** ➡ • **Settings**
2. ➡ • CRM tab
3. Check the box Create email Activity with Outlook
4. ➡ • **Ok**



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).



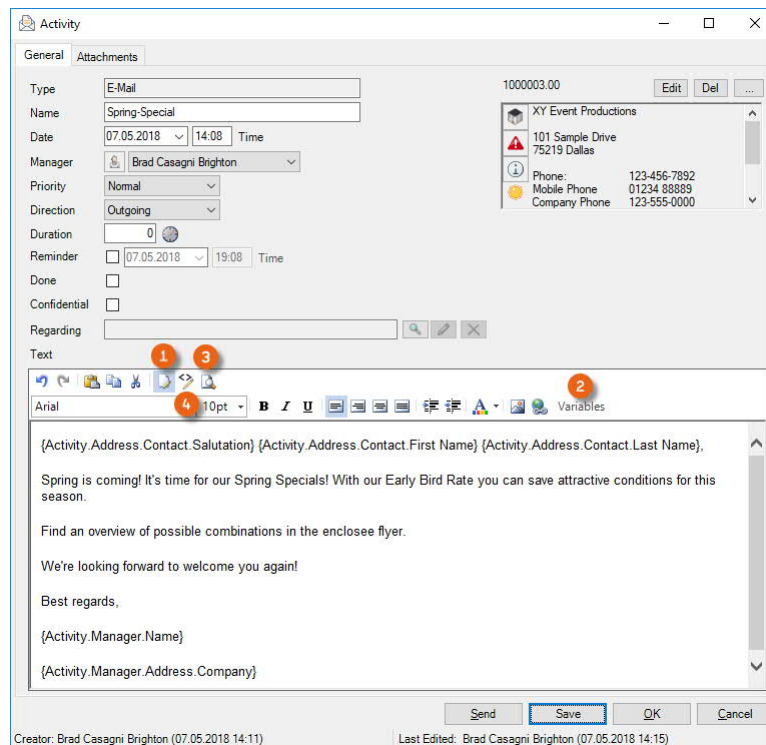
Defining the templates:

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

easyjob must be restarted to activate the settings.

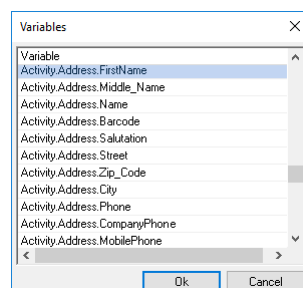
Variables

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 HTML 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.

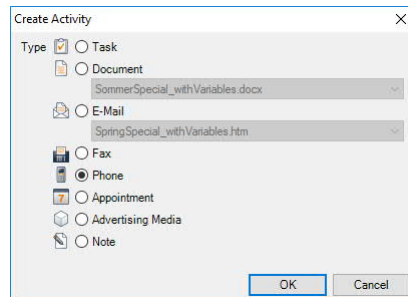
The process to which the activity refers is called the [Reference Type](#). This means, for example, an Address, a Project, a Rental Job, an Invoice, a Purchase Order, a Sales Job, an Item or a Workshop Activity. You can use the magnifying glass ⑫ to open the Reference Type selection, and at the end 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

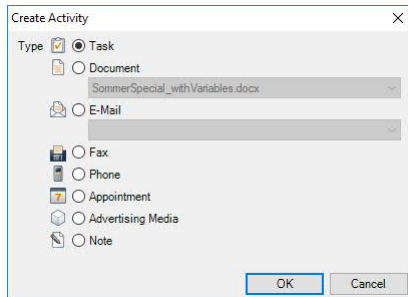
Creating activities from the easyjob Menu:

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.

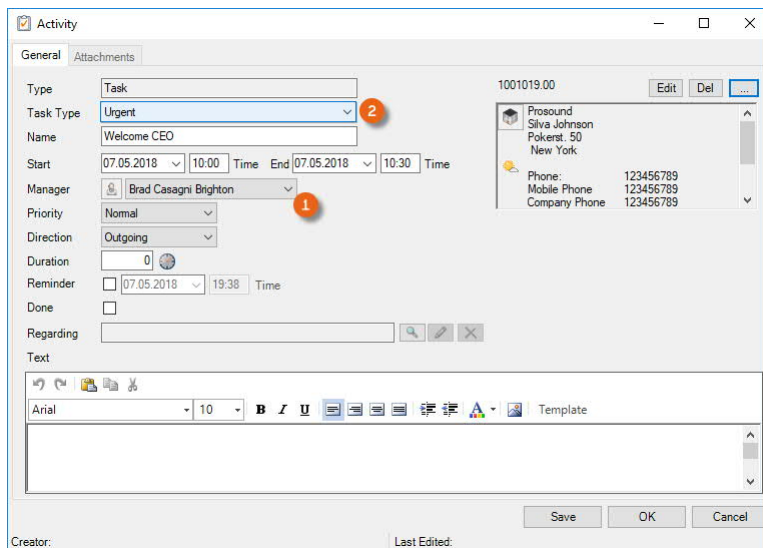
Activity Type

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



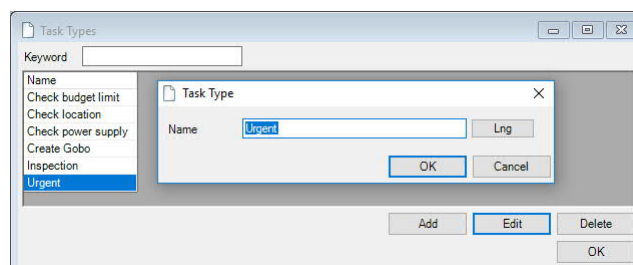
Task

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



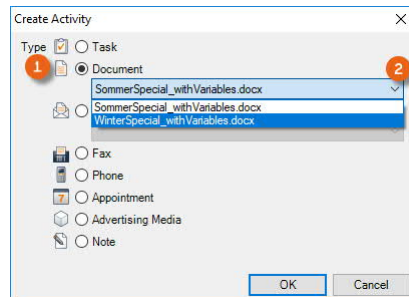
5. ➡ Ok

Quick Task

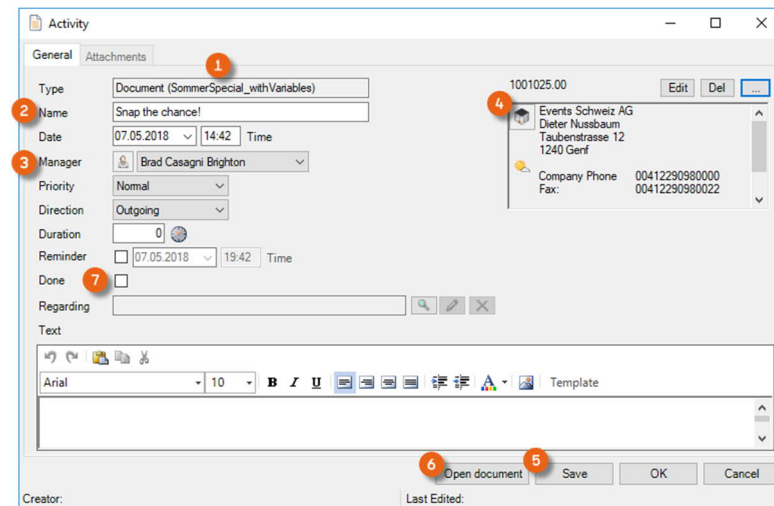
You can create a task type activity even faster using the key combination CTRL +T. Regardless of where you are in easyjob, this combination opens a new activity and you can assign a task to yourself or others.

Document

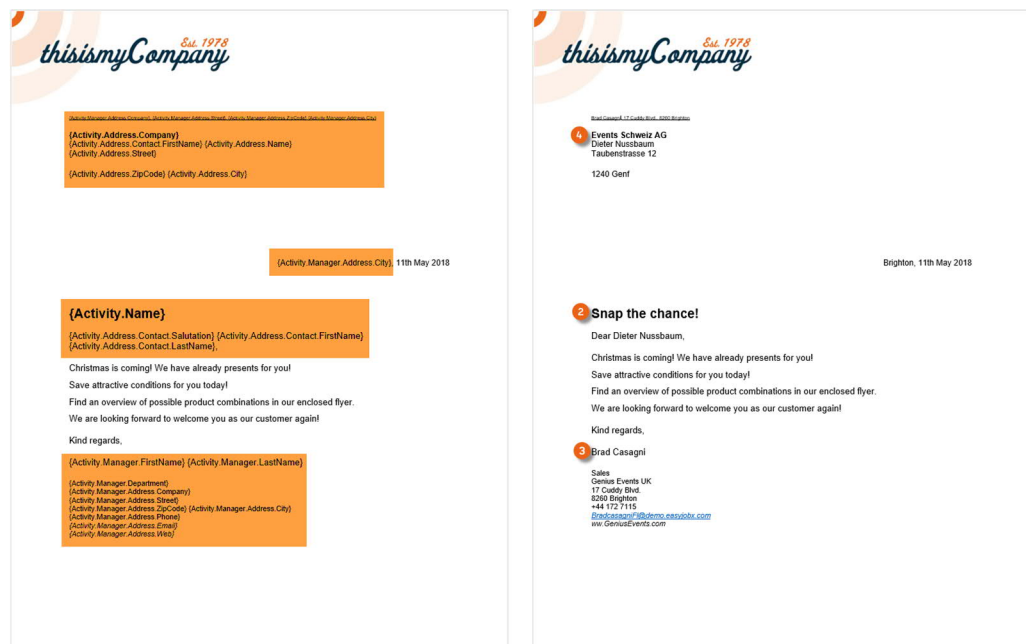
With the document activity, you can select Word documents that you previously created as a template and edited as required.



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](#).

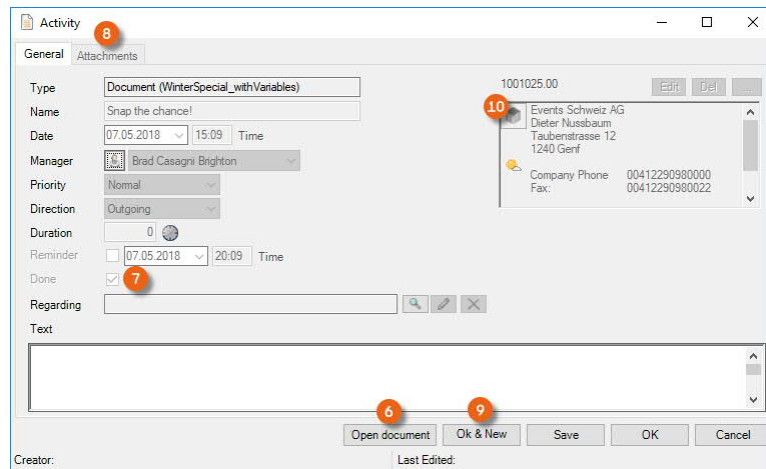


The name of the selected document ① is displayed in brackets. In this Word example, Variables are set for the fields Name ②, Manager ③ and Address ④. After pressing Save ⑤ and Open document ⑥, the created document is opened.



CRM - Activities


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.

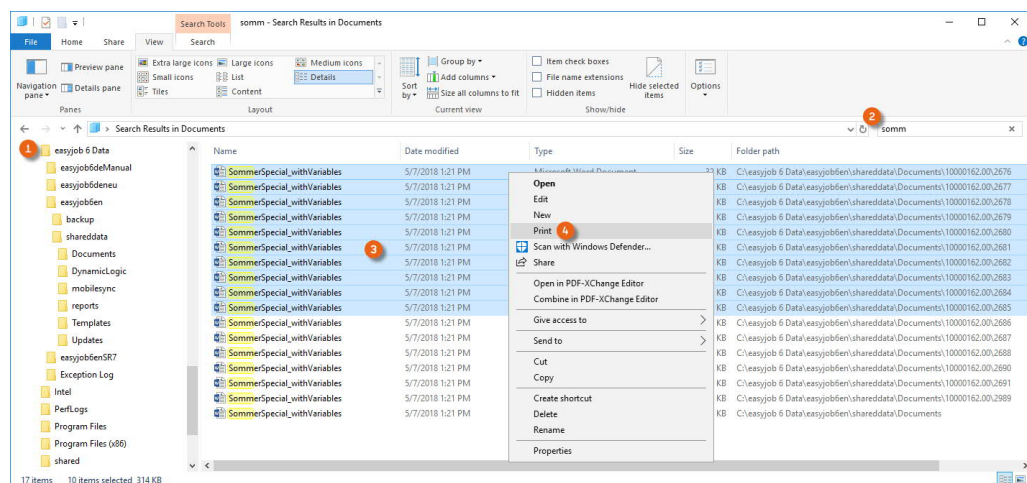


Create a new activity with **Ok & New** ⑨. All entries are kept and you can create the same document for another customer by changing the address ⑩.

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.

The screenshot shows the 'Activity' window with the 'General' tab selected. The 'Type' is set to 'Phone'. The 'Name' is 'Question if damage could be repaired'. The 'Date' is '07.05.2018' and the 'Time' is '15:23'. The 'Manager' is 'Brad Casagni Brighton'. The 'Priority' is 'Normal'. The 'Direction' is 'Outgoing'. The 'Duration' is '0'. The 'Reminder' is set to '07.05.2018' at '20:23'. The 'Done' checkbox is checked. The 'Confidential' checkbox is unchecked, with a red warning icon next to it. The 'Regarding' field is '12-0002 Repair'. The 'Text' field is empty. The 'Attachments' tab shows a list of attachments: 'Audio Visual Service', 'Tom Easy', and 'Dallas'. The 'Phone' field shows '1-877-800-8866' for 'Company Phone' and 'Home Phone'. The 'Ok & New', 'Save', 'OK', and 'Cancel' buttons are at the bottom. The 'Creator' is '(07.05.2018 15:24)' and the 'Last Edited' is 'Brad Casagni Brighton (07.05.2018 15:25)'.

Appointment

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

The screenshot shows the 'Activity' window with the 'General' tab selected. The 'Type' is set to 'Appointment'. The 'Name' is 'Meeting with customer'. The 'Start' is '08.05.2018' at '10:00' and the 'End' is '08.05.2018' at '14:00'. The 'Manager' is 'Brad Casagni Brighton'. The 'Priority' is 'Normal'. The 'Direction' is 'Outgoing'. The 'Duration' is '0'. The 'Reminder' is set to '08.05.2018' at '08:00'. The 'Done' checkbox is unchecked. The 'Regarding' field is '17-0013.01 Summer Revival Festival'. The 'Text' field contains the text 'Please bring last summer event presentation with you.' The 'Attachments' tab shows a list of attachments: 'Prosound', 'Silva Johnson', 'Pokenst. 50', and 'New York'. The 'Phone' field shows '123456789' for 'Mobile Phone' and 'Company Phone'. The 'Save', 'OK', and 'Cancel' buttons are at the bottom. The 'Creator' is empty and the 'Last Edited' is empty.

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](#)

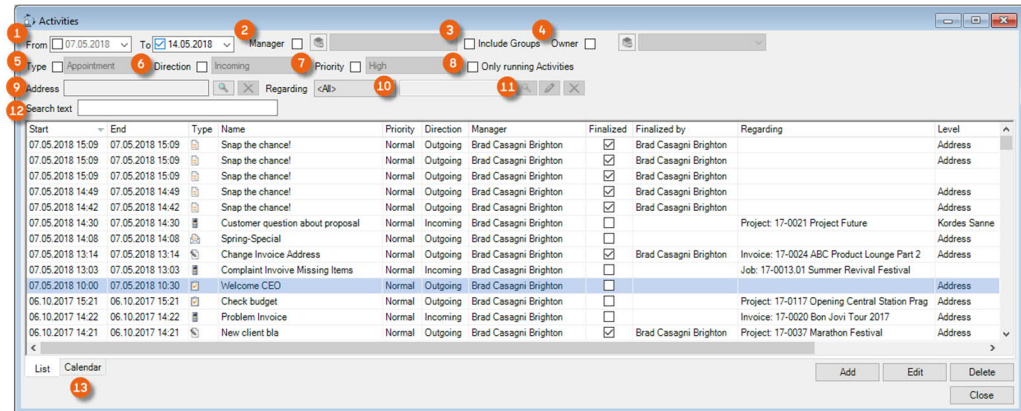
The screenshot shows a 'Print' dialog box with the following sections:

- Printer First Page:** <Standard>
- Printer Following Pages:** <Standard>
- Options:** Copies: 1, Attach file to Project: ☐, Open file: ☐
- Output:** ☒ Printer, ☐ Preview, ☐ File
- Format:** ☒ PDF, ☐ RTF, ☐ XML, ☐ HTML, ☐ E-Mail, ☐ JPG, ☐ BMP, ☐ XLSX, ☐ DOCX
- Activity:**
 - ☒ Create
 - Name: Summer Revival Festival
 - Date: 20.05.2018
 - Type: Phone (selected), Task
- ☐ Quick Design
- Buttons: Edit, OK, Cancel

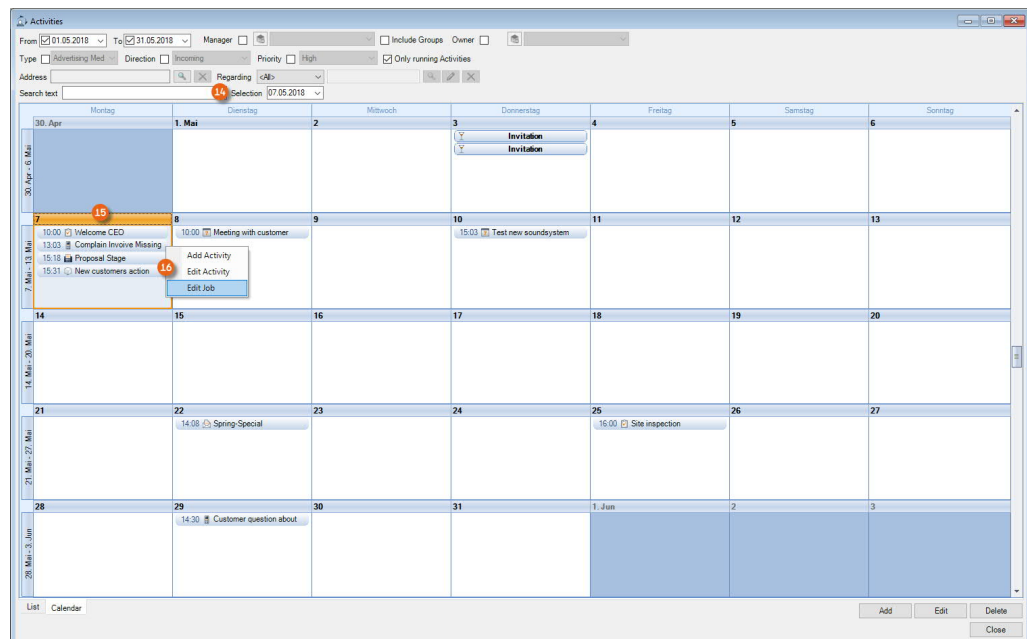
5. Under Activity, check the [Create](#) ① box
6. Enter a Name ②, a Date ③ and set the Activity Type ④
7. [↩• Ok](#)

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.

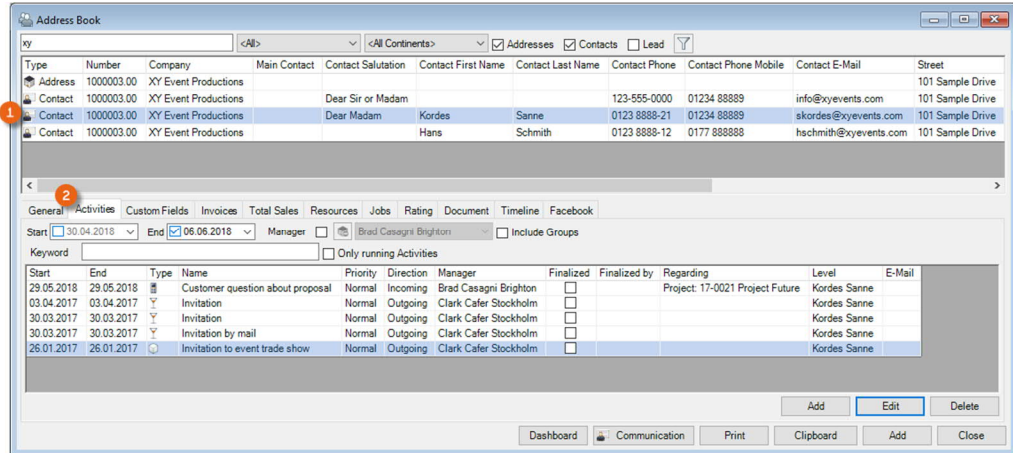


Selecting activities from the overview:

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

Activities in the Address Book

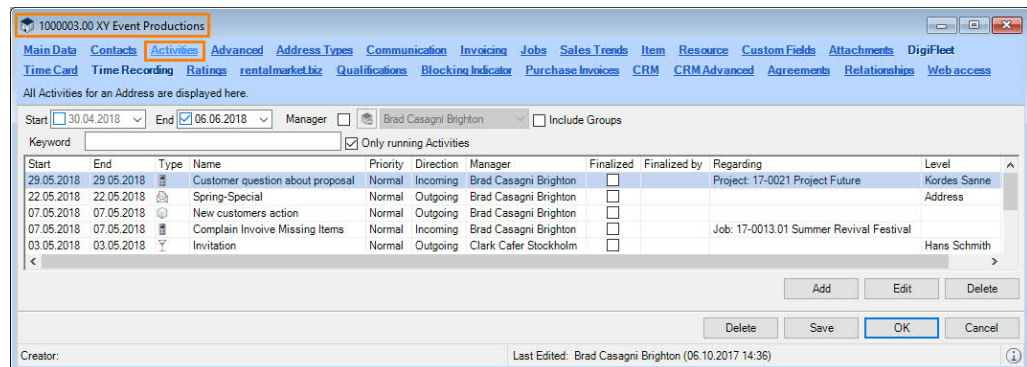
You can use the Address Book to create an overview of the activities related to the selected Address or the selected Contact and edit them if necessary. Use the up/down arrow key to select the Contact or the Address ①. The related Activities ② will be displayed in the information window. Also a timeline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



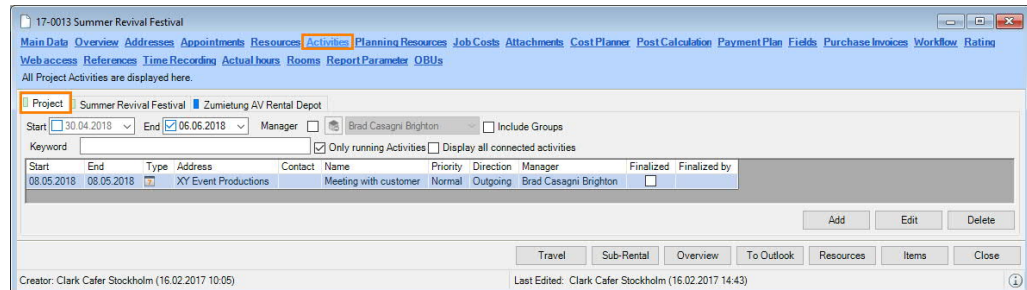
Activities in the reference type

The created activities 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

17-0013 Summer Revival Festival

Main Data Overview Addresses Appointments Resources **Activities** Planning Resources Job Costs Attachments Cost Planner Post Calculation Payment Plan Fields Purchase Invoices Workflow Rating

Web access References Time Recording Actual hours Rooms Report Parameter OBU's

All Project Activities are displayed here.

Project: Summer Revival Festival Zumietung AV Rental Depot

Start: 30.04.2018 End: 06.06.2018 Manager: Brad Casagni Brighton Include Groups

Keyword: Only running Activities

Start	End	Type	Address	Contact	Name	Priority	Direction	Manager	Finalized	Finalized by
07.05.2018	07.05.2018		XY Event Productions		Complain Invoice Missing Items	Normal	Incoming	Brad Casagni Brighton		

Add Edit Delete

Travel Sub-Rental Overview To Outlook Resources Items Close

Creator: Clark Cafer Stockholm (16.02.2017 10:05) Last Edited: Clark Cafer Stockholm (16.02.2017 14:43)

Invoice

Invoice ABC Product Lounge Part 2 (17-0024)

Main Data

Invoice Number: 17-0024 Date: 25.08.2017 Tax Type: Local Dallas Reminder Status: Manager: sys admin Payment Receipt: 0.00 Fr Paid Title: ABC Product Lounge Part 2

Address

Salutation: Dear Sir or Madam Name 1: XY Event Productions Name 2: Street: 101 Sample Drive Zip Code, City: 75219 Dallas Country: United States Debitor I.D.: 1350000020 Tax I.: USA 123456789XX

Invoice Items Advanced RTF Fields Payment Receipts **Activities** Financial data Blocking Indicator Workflow

Start: 30.04.2018 End: 06.06.2018 Manager: Brad Casagni Brighton Include Groups

Keyword: Only running Activities

Start	End	Type	Address	Contact	Name	Priority	Direction	Manager	Finalized	Finalized by
07.05.2018	07.05.2018		XY Event Productions		Change Invoice address	Normal	Outgoing	Brad Casagni Brighton		Brad Casagni Brighton

Add Edit Delete

Print Finalize OK

Creator: sys admin (25.08.2017 14:04) Last Edited: Brad Casagni Brighton (07.05.2018 13:16)

Purchase Order

17-0006 Sub-hire 123 You're Hired Inc.

Main Data Line Items Resources **Activities** Attachments Cost Planner Purchase Invoices Workflow

All Activities for the Purchase Order are displayed here.

Start: 30.04.2018 End: 06.06.2018 Manager: Brad Casagni Brighton Include Groups

Keyword: Only running Activities

Start	End	Type	Address	Contact	Name	Priority	Direction	Manager	Finalized	Finalized by
07.05.2018	07.05.2018		Abdullah Aaron		Room reserved	Normal	Outgoing	Brad Casagni Brighton		
07.05.2018	07.05.2018		Alan Andersen		Send list of members	Normal	Outgoing	Brad Casagni Brighton		

Add Edit Delete

Print Line Items Save OK Cancel

Creator: Clark Cafer Stockholm (17.02.2017 12:29) Last Edited: Brad Casagni Brighton (19.09.2017 12:35)

Item

1007753.00 Christie CDXL-30

Main Data Prices Inventory Site Devices Associated Items Jobs Alternatives Usage Report Suppliers Custom Fields References Image

Activities Attachments Purchase Invoices Web shop Scanner Quality Assurance Manufacturing Controller rentalmarket.biz Blocking Indicator

All Activities for an Item are displayed here.

Start: 30.04.2018 End: 06.06.2018 Manager: Brad Casagni Brighton Include Groups

Keyword: Only running Activities Display all connected activities

Start	End	Type	Address	Contact	Name	Priority	Direction	Manager	Finalized	Finalized by
07.05.2018	07.05.2018		Abdullah Aaron		Advance booking follow-up model	Normal	Outgoing	Brad Casagni Brighton		
07.05.2018	07.05.2018		AV Rental Depot		Confirmation order	Normal	Outgoing	Brad Casagni Brighton		

Add Edit Delete

Delete Copy Print Save OK Cancel

Creator: sys admin (16.04.2015 12:01) Last Edited: Clark Cafer Stockholm (07.09.2017 13:40)

Workshop activity

Workshop Activity

Main Data Advanced **Activities** Resources Instructions Spare parts Log Test Results Cost Planner Attachments Purchase Invoices

All activities for the workshop activity are managed here.

Start End ☒ 06.06.2018 Manager ☐ Brad Casagni Brighton ☐ Include Groups

Keyword ☒ Only running Activities

Start	End	Type	Address	Contact	Name	Priority	Direction	Manager	Finalized	Finalized by
07.05.2018	07.05.2018	Audio Visual Service	Check if the damage could be repaired			Normal	Outgoing	Brad Casagni Brighton	<input type="checkbox"/>	

Add Edit Delete

Scrap Availability Print Save OK Cancel

Creator: Clark Cafer Stockholm (22.02.2017 09:58) Last Edited:

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.

Resource Plan

Default Own Staff Vehicles

Montag, 7. Mai 2018 Montag, 14. Mai 2018 Stockholm, Prague, Brighton <Event>

<Current View>

Work Type

- ☒ Resource Assignments
- ☒ Resource Status
- ☒ Activities (Appointments/Tasks)

Assignment Status

- ☐ Preferred
- ☒ Requested
- ☒ Confirmed
- ☐ Canceled

Freelancer Status

- ☒ Preferred
- ☒ Request
- ☒ Requested
- ☒ Confirm
- ☒ Confirmed

Own Staff

Staff	Activity
Casagni, Brad	Welcome CEO (Urgent)
	Advance booking follow-up model (Appointment)
George, Finn	Training
Slava Prag, Milan	Meeting Project (Urgent)
	Meeting with customer (Appointment)

Job

Number 17-0013.01

Custom Number Summer Revival Festival

Name Summer Revival Festival

Status Confirmed

Start 01.12.2017 09:00

End 06.07.2018 23:00

Service Full-Service

User Milan Slava Prag

Activity

Type Urgent

Name Meeting Project

Start 07.05.2018 11:00

End 07.05.2018 17:00

Manager Milan Slava Prag

Process 17-0013.01 Summer Revival Festival

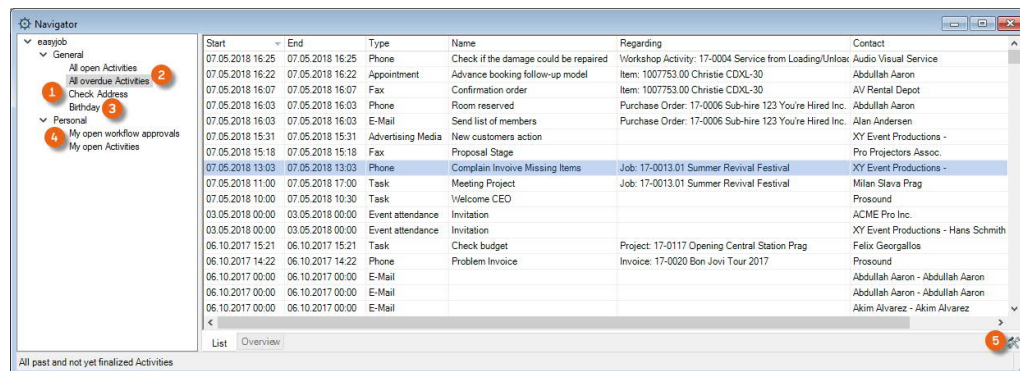
Address Milan Slava Prag

Activities at a glance

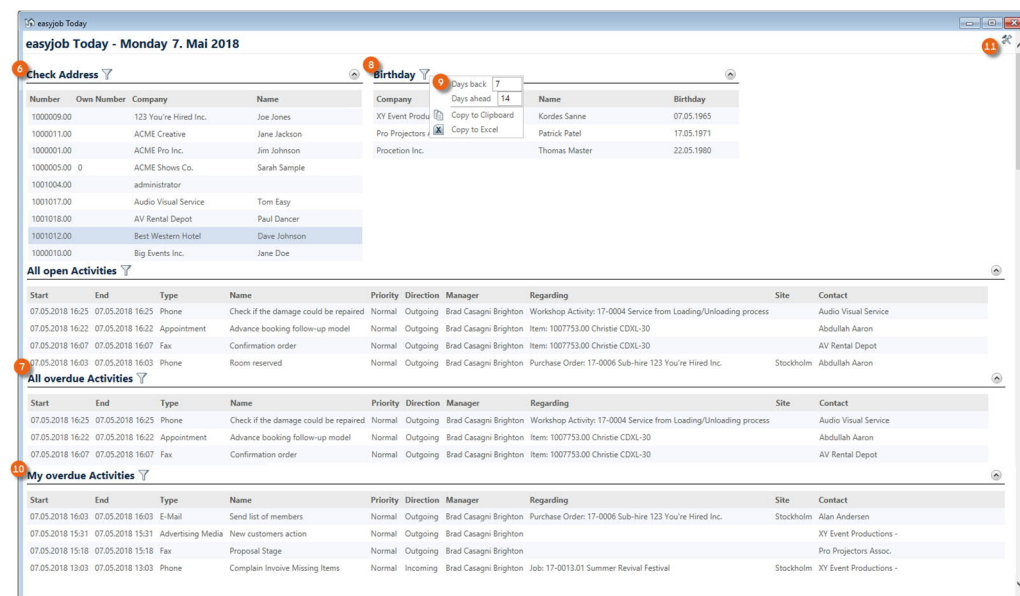
To see open and overdue activities at a glance, the Navigator, easyjob Today and the reminder screen are available.

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.

Number	Own Number	Company	Name
1001011.00		Zipp Production	Jonny Cash
1000045.00		Youngstown Super Truss Rent	ada Abbas
1000031.00		york Lighting Rental	Adam Abdullah
1000014.00		Winchester AV Distribution	Adam Al Kadamani
1000035.00		Wimmenau LX Ligh Shop	David Albakri
1000046.00		WILTSHIRE Theater	Adrian Alberdi
1000036.00		wilmington Music Theater	David AlBinali
1000021.00		Wilmington Concert Arena	agus mudo alcorn
1000013.00		Wilmington ALS Road Show	Adrian alcantar
1000027.00		Wijk bij Duurstede Crew Support	ahmad allen
1000022.00		Warsaw Concert Arena	allene Arakon
1000047.00		Vianen Theater	Andrew balan
1000044.00		Valencia Quick Ligh Shop	Andrew Bentzen
1000037.00		Upplandsväsby Music Theater	David Beylier
1000015.00		Tucson Car Dealership	Artur Blair
1000023.00		Trige Concert Arena	ASHLEY Boshart
1000048.00		Torcy ZI NORD Theater	Bart Bridle
1000028.00		Taren Point Crew Support	Bill Burchell

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

The screenshot shows a 'Contact' form with the 'Advanced' tab selected. The 'Birthday' field is highlighted with an orange box and shows a date picker set to 07.05.1965. Other fields include 'Contact_Field_1', 'Contact_Field_2', 'Place of birth' (New York), 'I.D. Card No./valid to', 'Passport No./valid to', 'Social security number', and 'License Plate'. The form has 'Save', 'OK', and 'Cancel' buttons at the bottom. The status bar at the bottom indicates 'Last Edited: Brad Casagni Brighton (07.05.2018 16:44)'.

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

Activity window showing details for a task. The 'Reminder' checkbox is checked (1). The 'Reminder' dropdown is set to '23.05.2018' and '09:30'. The 'Regarding' field is '17-0013 Summer Revival Festival'. The 'Text' field contains 'Please double check if customer is happy with the order.'

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.

Reminders window showing a list of reminders. The 'Activities Reminder' tab is selected (2). The 'Settings' button is visible (4). The 'Reminder interval' is set to '15 Minutes' (3).

Start	End	Type	Name	Priority	Direction	Manager	Regarding	Site	Contact
07.05.2018 15:42	07.05.2018 16:42	Task	Power supply check	Normal	Outgoing	Clark Cafer Stockholm	Project: 17-0009 Cityline Football	Stockholm	ACME Pro Inc.

Start	End	Type	Name	Regarding	Contact
07.05.2018 16:25	07.05.2018 16:25	Phone	Check if the damage could be repaired	Workshop Activity: 17-0004 Service from Loading/Unloading process	Audio Visual Service
07.05.2018 16:22	07.05.2018 16:22	Appointment	Advance booking follow-up model	Item: 1007753.00 Christie CDXL-30	Abdullah Aaron
07.05.2018 16:07	07.05.2018 16:07	Fax	Confirmation order	Item: 1007753.00 Christie CDXL-30	AV Rental Depot
07.05.2018 16:03	07.05.2018 16:03	Phone	Room reserved	Purchase Order: 17-0006 Sub-hire 123 You're Hired Inc.	Abdullah Aaron

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

User Settings window showing the 'Reminders' tab. The 'Activities Reminder' view is selected. The 'Add' and 'Delete' buttons are visible.

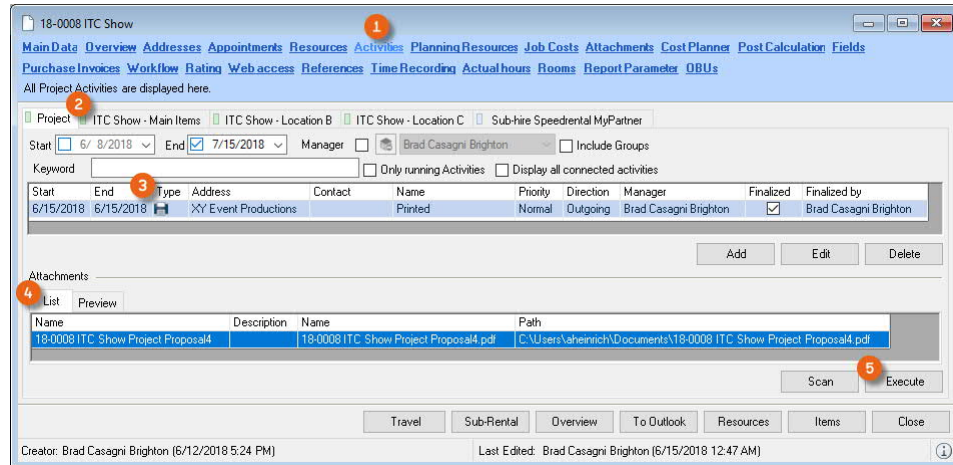
Activating reminders from the easyjob Menu:

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.

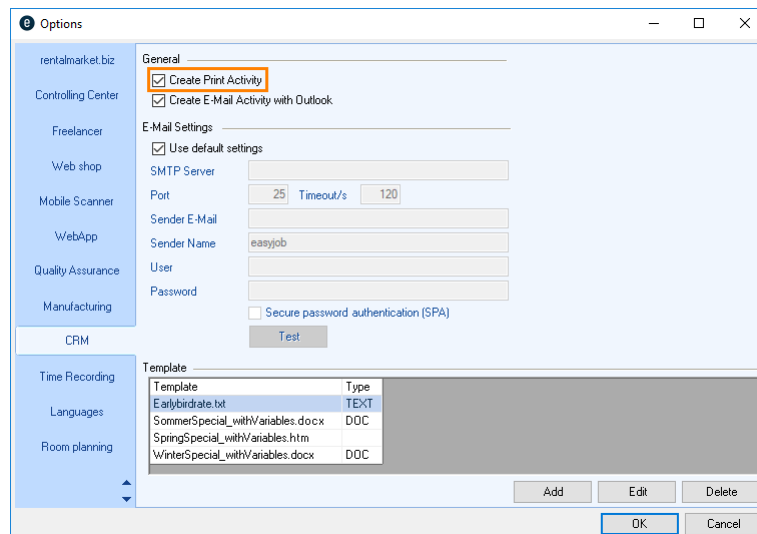
Print activities

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

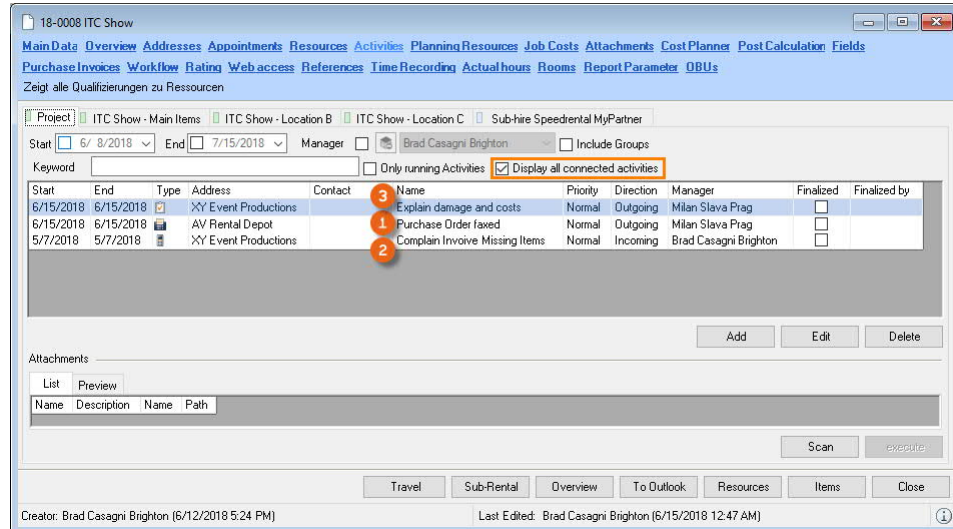


3. Check the Create print activities box
4. • [Ok](#)

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.

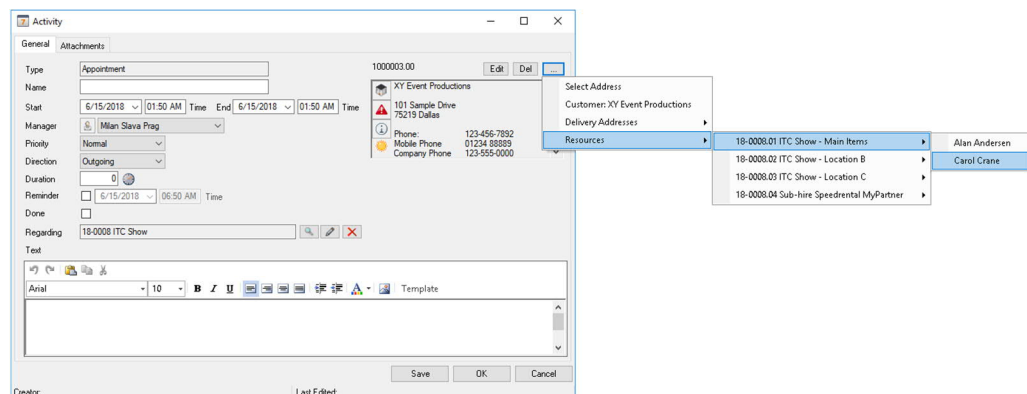


Activating all connected activities:

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.

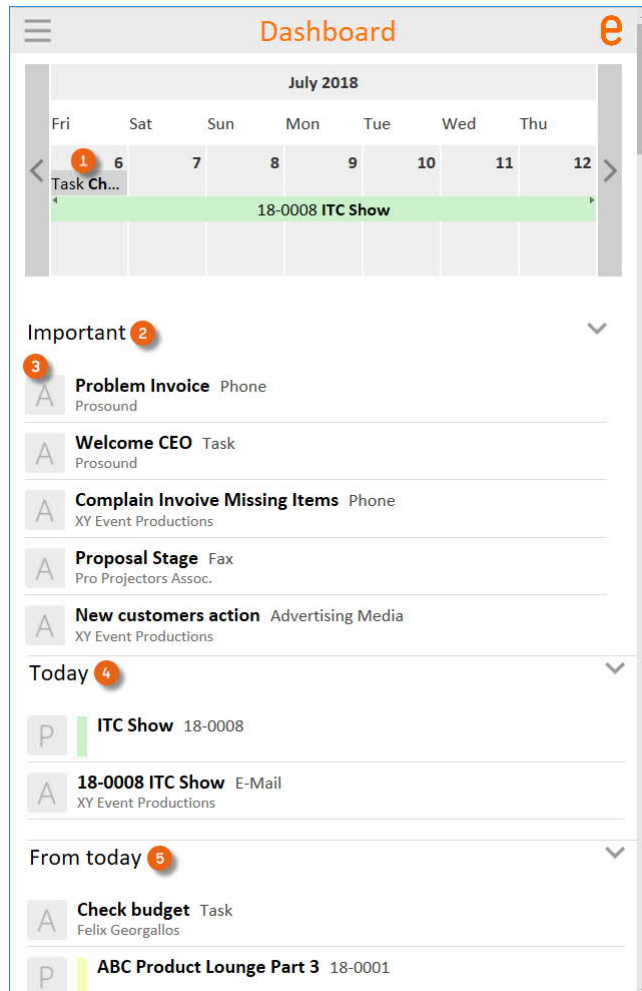


Activities in the WebApp

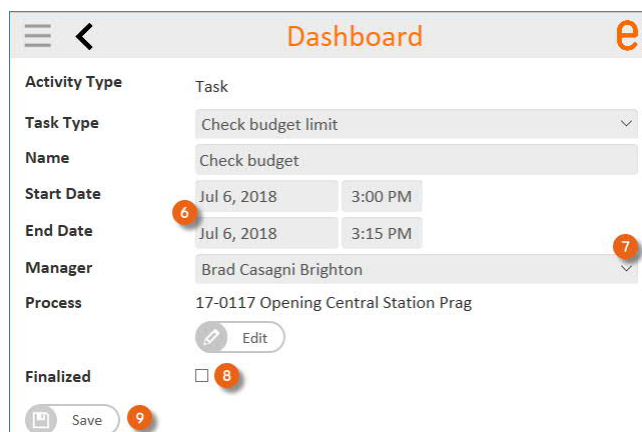
Information from CRM can be viewed and managed using the easyjob 6 WebApp.

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.

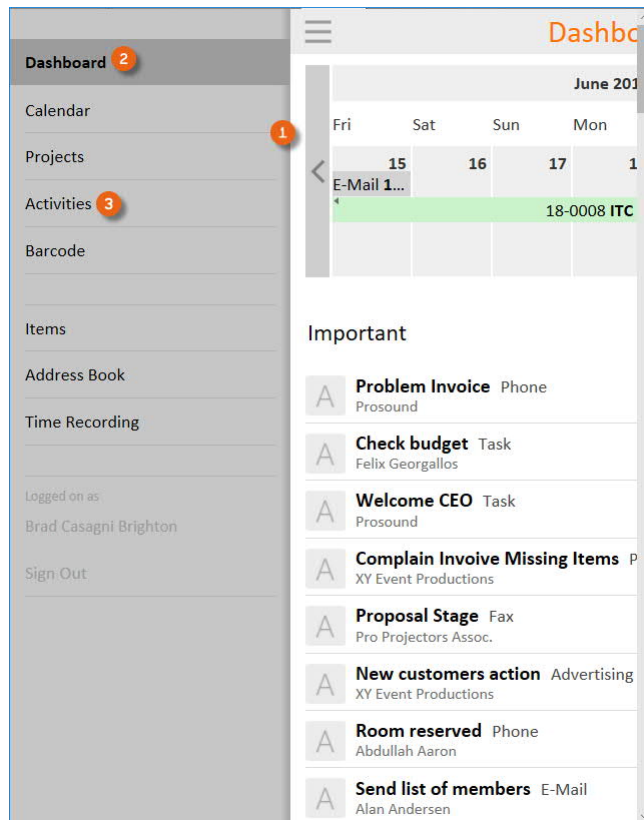


To edit an activity, tap it and you can change the start and end time ⑥, the Manager ⑦ and the Address ⑧, mark the activity as Done ⑨ and save your entries ⑩.

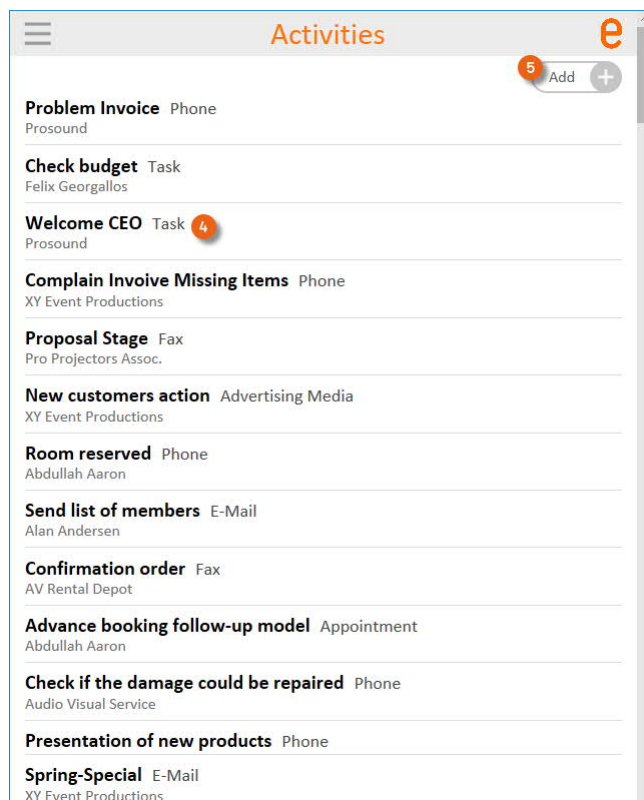


Activities

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.

The screenshot displays the 'Address Book' interface for a contact named '1000003.00 XY Event Productions'. The interface is divided into several sections:

- Company:** XY Event Productions, 101 Sample Drive, 75219 Dallas, 01234 88889. Phone: 123-456-7892. E-Mail: info@xyevents.com.
- Contact:** A section with a right-pointing arrow.
- Timeline ①:** A vertical timeline showing activities from May 29, 2018, to July 2, 2018. The activities are:
 - Monday, July 2, 2018:** 18-0008.02 ITC Show - Location B (green bar).
 - Friday, June 15, 2018:** 12:06 AM - 18-0008 ITC Show (grey bar).
 - Thursday, June 14, 2018:** 11:42 PM - 18-0008 ITC Show (grey bar).
 - Friday, June 1, 2018:** 10:00 AM - Spring special as well (grey bar), 10:00 AM - Newsletter June for all L-Customers (grey bar), Last minute (grey bar), 18-0008.01 ITC Show - Main Items (green bar).
 - Tuesday, May 29, 2018:** 2:30 PM - Customer question about proposal (grey bar), 10:00 AM - 18-0007.07 Sub-Rental ABC Product Lounge Part 3 (blue bar).
- Activities ②:** A section with a right-pointing arrow.
- CRM ③:** A section with a right-pointing arrow.

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.

Projects										
From	6/15/2018		<input checked="" type="checkbox"/> Rental	<input type="checkbox"/> Sub-Rental	<input checked="" type="checkbox"/> Sales	Type	<All>			
To	7/15/2018		<input checked="" type="checkbox"/> Proposed	<input checked="" type="checkbox"/> Confirmed	<input type="checkbox"/> Canceled	Priority	<All>			
Keyword						Site	Stockholm, Prague, Brighton			
Customer						Manager	<All>			
Number	Name	Start Date	End Date	Priority	Manager	Status	Customer	Site	Project Total	Probability
17-0013	Summer Revival Festival	12/1/2017 9:00 AM	7/6/2018 11:00 PM	Normal	Claer Clark	Confirmed	XY Event Productions	Stockholm	€13,000.00	70.00%
18-0008	ITC Show	6/1/2018 12:00 AM	7/31/2018 12:00 AM	Normal	Milan Slava	Confirmed	XY Event Productions	Stockholm	€9,370.56	70.00%
18-0001	ABC Product Lounge Part 3	9/3/2018 10:00 AM	9/10/2018 10:00 PM	Normal	Milan Slava	Proposed	XY Event Productions	Stockholm	€114,674.66	60.00%

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.

The screenshot shows the 'Main Data' tab of a project record. The 'Status' is set to 'Canceled'. A tooltip for 'Lost to competitor' is displayed, showing 'Dumping' and 'Competitor: AV Rental Depot'. The 'Delivery Address/Venue' field shows 'Best Western Hotel'.

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**

The 'Status Change Reason' dialog box is shown. The 'Reason' dropdown is set to 'Lost to competitor'. The 'Notes' field contains the text 'Lost to competitor' and 'Lost to other customer'.

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.

17-0013 Technology Center Sound

Main Data

Project Name: Technology Center Sound

Project Number: 17-0013

Reference Number:

Manager: sys admin

Status: Proposed

Priority: Normal

Type:

Site: Stockholm

Base Currency: EUR

Output Currency: EUR

Purchaser:

Customer: 1000006.00

Demolight Co.
Larry Lopez
Millon Dollar Mile
12345 Dallas

The Address is locked for:
Credit Limit: 5,000,00 € of '5,000,00', Open entries '0,00', Confirmed jobs '3,469,00'

eMail: aheintichR@demo.easyjobx.com
Web: http://www.rm.biz

Notes:

Travel Sub-Rental Overview To Outlook Resources Items Close

Creator: sys admin (22.01.2012 16:26) Last Edited:

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

07-0013 Technology Center Sound

Main Data Overview Addresses Appointments Resources Activities Planning Resources Job Costs Attachments Cost Planner Post Calculation Fields

Purchase Invoices Workflow Rating Web access References Time Recording Rooms Report Parameter OBUs

Here you can analyze the profitability of your Project/Job.

Project Technology Center Sound

	Income	Expenses	Profit
Items	1.564,80 €	1.256,00 €	20 %
Resources	0,00 €	0,00 €	0 %
OBUs	0,00 €	0,00 €	0 %
Rooms	0,00 €	0,00 €	0 %
Job Costs	0,00 €	0,00 €	0 %
Subtotal	1.564,80 €	1.256,00 €	20 %
Total	1.564,80 €		

Total calculated

Tax: Worldwide

The Address is locked for:
Credit Limit: 5,000,00 € of '5,000,00', Open entries '0,00', Confirmed jobs '5,033,80'

Travel Sub-Rental Overview To Outlook Resources Items Close

Creator: sys admin (22.01.2012 16:26) Last Edited: Brad Casagni Brighton (08.05.2018 10:06)

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](#)

CRM - Address Master Data

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

Start	End	Type	Name	Priority	Direction	Manager	Finalized
29.05.2018	29.05.2018		Customer question about proposal	Normal	Incoming	Brad Casagni Brighton	<input type="checkbox"/>
23.05.2018	23.05.2018		Check if event run fine	Normal	Outgoing	Brad Casagni Brighton	<input type="checkbox"/>
03.04.2017	03.04.2017		Invitation	Normal	Outgoing	Clark Cafer Stockholm	<input type="checkbox"/>
30.03.2017	30.03.2017		Invitation	Normal	Outgoing	Clark Cafer Stockholm	<input type="checkbox"/>
30.03.2017	30.03.2017		Invitation by mail	Normal	Outgoing	Clark Cafer Stockholm	<input type="checkbox"/>
26.01.2017	26.01.2017		Invitation to event trade show	Normal	Outgoing	Clark Cafer Stockholm	<input type="checkbox"/>

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

Blocking Indicator

☐ Deactivated

☐ E-Mail

☒ Phone

Save OK Cancel

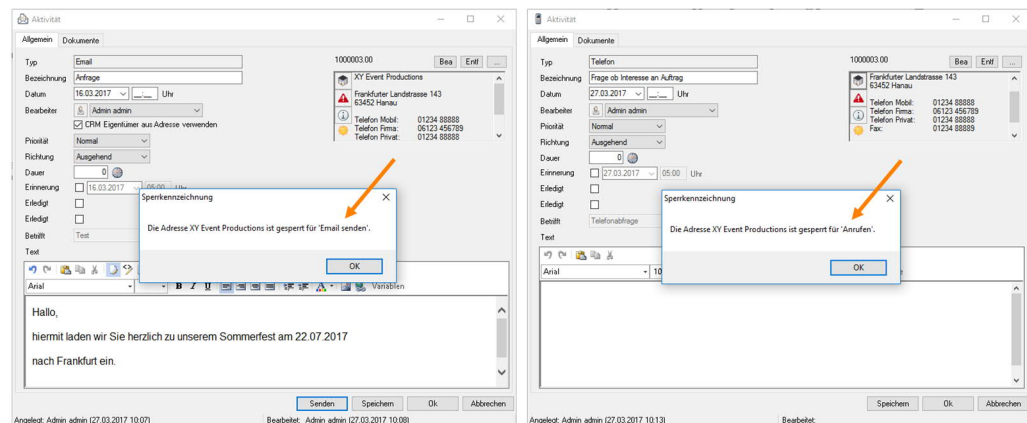
6. ➡ • [Save](#)

Activities

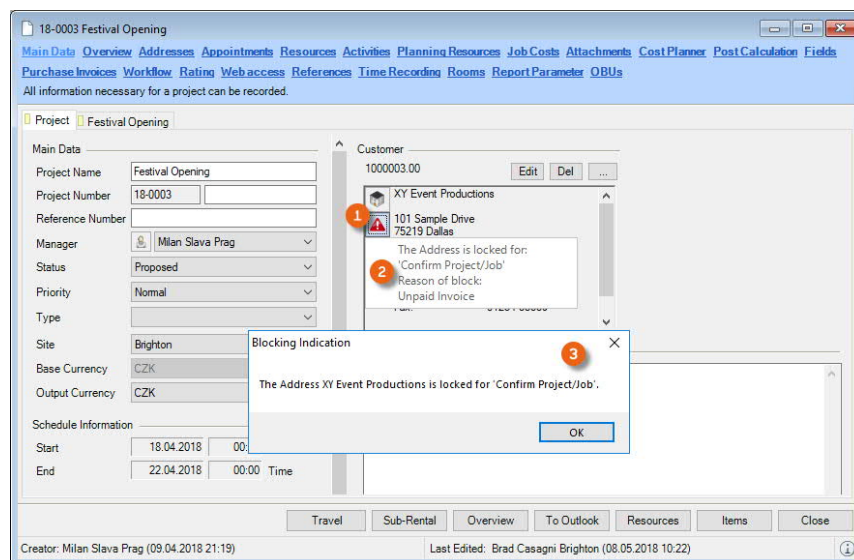
Here you can find an overview of the activities assigned to this Address. See also [Activities in the reference type](#).

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

1000003.00 XY Event Productions

Main Data Contacts Activities Advanced Address Types Communication Invoicing Jobs

Sales Trends Item Resource Custom Fields Attachments Blocking Indicator

Block indicators can be stored here.

Blocking Indicator

☐ Deactivated

☐ Assign project customer

☒ Confirm Job/Project

☐ Load/Check-Out Job

☐ Create invoice

☐ Create reminder

☐ Create Purchase Order

☐ Create sales order

☐ Assign Resource

☐ Credit Limit

☒ E-Mail

☐ Phone

Reason of block

Unpaid Invoice

Delete Save OK Cancel

Creator: Last Edited: Brad Casagni Brighton (08.05.2018 10:22)

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.

The screenshot shows the CRM software interface for '1000003.00 XY Event Productions'. The top menu bar includes options like Main Data, Contacts, Activities, Advanced, Address Types, Communication, Invoicing, Jobs, Trends, Item, Resource, Custom Fields, Attachments, Digifleet, Time Card, Time Recording, Ratings, rentalmarket.biz, Qualifications, Blocking Indicator, Purchase Invoices, CRM, CRM Advanced, Agreements, Relationships, Web access, and Report Parameter. The CRM tab is selected, showing a summary of the CRM Owner (Milan Stava Prag), Industry (Eventagency), and Parent (1001030.00 Procection Inc.). Below this, there are sections for Marketing Lists, Subsidiaries, and Campaigns. The Marketing Lists section shows a table with columns Name, Description, and Filter. The Subsidiaries section shows a table with columns Type, Number, Company, Company 2, Salutation, First Name, Middle Name, Last Name, City, State, Country, Phone, Company Phone, Home Phone, and Web. The Campaigns section shows a table with columns Name, Description, Start, and End. At the bottom, there are buttons for Add, Edit, Delete, Save, OK, and Cancel, along with a footer showing the creator and last edited date.

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.

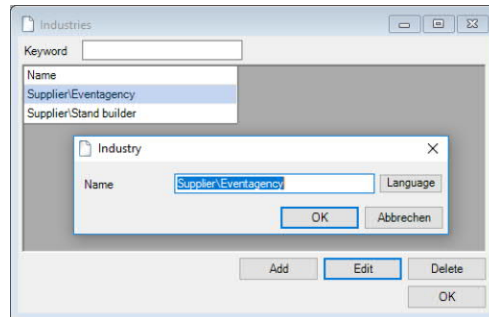
You can assign a right for [Change Foreign Owner](#) in the [User settings](#). If this right is not activated, Addresses and Contacts cannot be assigned to other users.

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:

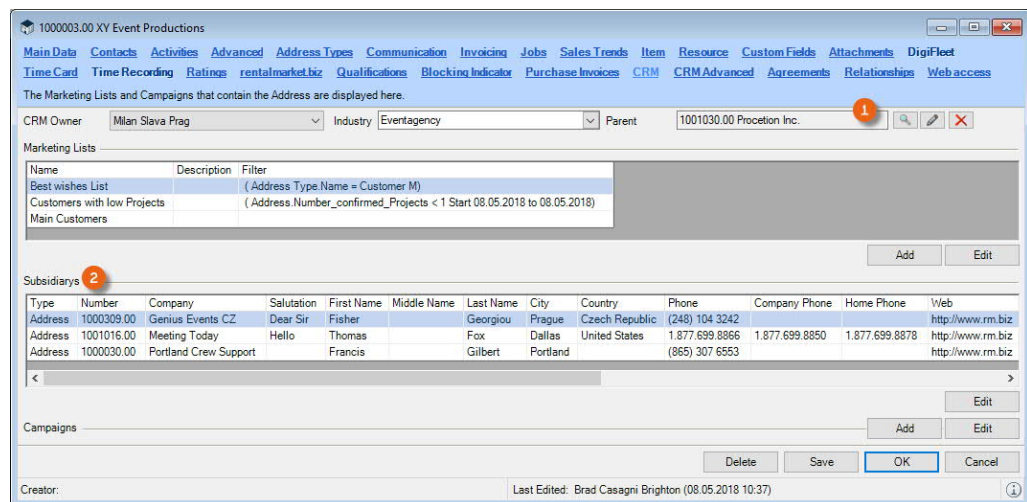
1. easyjob Menu ➡ • Master Data ➡ • Industries
2. ➡ • Add



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

CRM - Address Master Data

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

1000003.00 XY Event Productions

Main Data | Contacts | Activities | Advanced | Address Types | Communication | Invoicing | Jobs | Sales Trends | Item | Resource | Custom Fields | Attachments | DigiFleet | Time Card

Time Recording | Ratings | rentalmarket.biz | Qualifications | Blocking Indicator | Purchase Invoices | CRM | CRM Advanced | Agreements | Relationships | Web access | Report Parameter

Add additional Contacts here.

Salutation	First Name	Last Name	Company Phone	Home Phone	Mobile Phone	Fax	E-Mail	Department	Position	Zip Code	City	Company
Dear Sir or Madam	Kordes	Sanne	0123 8888-21	01234 88889	01234 88889	01234 88889	info@xyevents.com	Management	Head HR	75219	Dallas	XY Event Productions
Dear Madam	Hans	Schmith	0123 8888-12		0177 888888	0123 8888-22	hkordes@xyevents.com	Sales	CEO	75219	Dallas	XY Event Productions
Dear Sir	Francis	Gilbert	(865) 307 1000		(865) 307 4694	(865) 307 4620	FR@web.com	SALES	Head Sales	32828	Portland	Portland Crew Support
Hello	Thomas	Fox	1.877.699.8850	1.877.699.8878	1.877.699.8850	1.877.699.8850	Dallas@monster.com		CEO		Dallas	Meeting Today
Dear Sir	Fisher	Georgiou			(248) 104 3114					11000	Prague	Genius Events CZ

☒ View Subsidiary Contact ☐ Display deactivated

Buttons: Apply, Add, Edit, Delete, Delete, Save, OK, Cancel

Creator: Last Edited: Brad Casagni Brighton (08.05.2018 10:37)

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.

1000003.00 XY Event Productions

Main Data | Contacts | Activities | Advanced | Address Types | Communication | Invoicing | Jobs | Sales Trends | Item | Resource | Custom Fields | Attachments | DigiFleet

Time Card | Time Recording | Ratings | rentalmarket.biz | Qualifications | Blocking Indicator | Purchase Invoices | CRM | CRM Advanced | Agreements | Relationships | Web access

The Marketing Lists and Campaigns that contain the Address are displayed here.

CRM Owner: Milan Slava Prag Industry: Eventagency Parent: 1001030.00 Proction Inc.

Marketing Lists ①

Name	Description	Filter
Best wishes List		(Address Type Name = Customer M)
Customers with low Projects		(Address.Number_confirmed_Projects < 1 Start 08.05.2018 to 08.05.2018)
Main Customers		

Buttons: Add, Edit

Subsidiaries

Type	Number	Company	Salutation	First Name	Middle Name	Last Name	City	Country	Phone	Company Phone	Home Phone	Web
Address	1000309.00	Genius Events CZ	Dear Sir	Fisher		Georgiou	Prague	Czech Republic	(248) 104 3242			http://www.rm.biz
Address	1001016.00	Meeting Today	Hello	Thomas		Fox	Dallas	United States	1.877.699.8866	1.877.699.8850	1.877.699.8878	http://www.rm.biz
Address	1000030.00	Portland Crew Support	Dear Sir	Francis		Gilbert	Portland	United States	(865) 307 6553			http://www.rm.biz

Buttons: <, >, Edit

Campaigns ②

Name	Description	Start	End
Early Bird	5 % discount	01.01.2017 14:20	15.04.2017 14:20
Low project activation	Give all customers with low project a phone call	26.01.2015 18:26	02.02.2015 18:26
Opening city store		03.04.2017 11:19	10.04.2017 11:19
Summer Party Event	Event for potential customers	30.03.2017 10:21	06.04.2017 10:21
Summer Special	10 % discount	29.03.2017 14:19	05.04.2017 14:19

Buttons: Add, Edit, Delete, Save, OK, Cancel

Creator: Last Edited: Brad Casagni Brighton (08.05.2018 10:37)

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

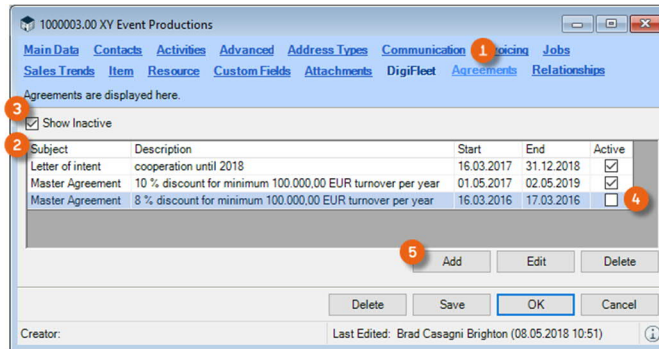
You can enter additional information about the address on the CRM Advanced ① tab. With details such as Status ② (Cold, Warm, Hot, Not interested and Qualified*), The next big thing ③ (the customer's next large project), Source ④ (where the information comes from), who the customer was Recommended by 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:

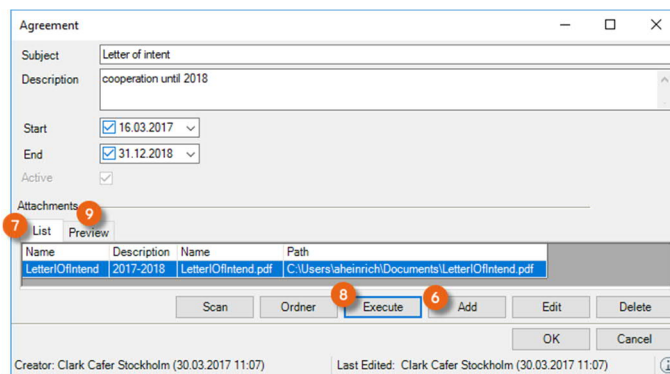
1. easyjob Menu ➡ View ➡ Addresses
2. Select an address
3. ➡ Edit
4. ➡ CRM Advanced tab
5. Enter the desired content
6. ➡ Save

Agreements

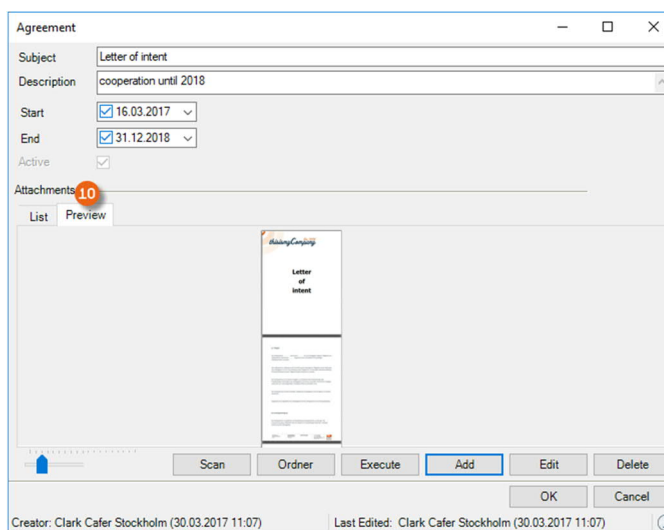
Another option for documenting your customer relationships is available on the Agreements ① tab. Master Agreements, Letters of intent, etc. can be documented and managed here in a clear manner. An Overview ② shows the topic, a description as well as the start and end of the agreement. With the Show Inactive 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.



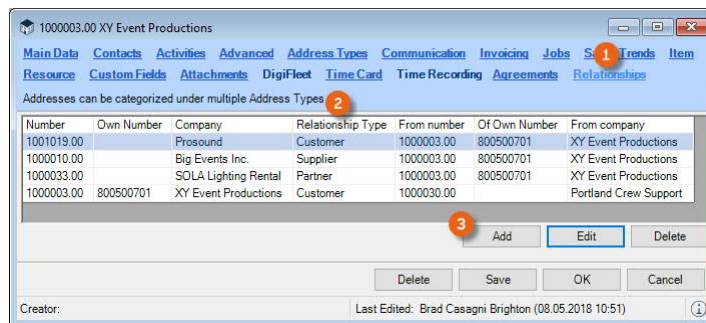
Creating agreements for an Address:

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

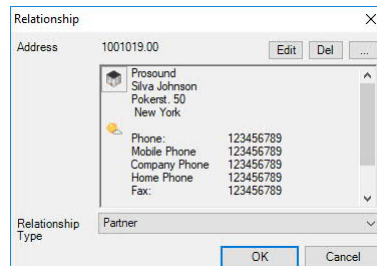
Addresses that have a particular relationship with each other can be recorded in the Address Master Data on the Relationships ① tab. You can define the type of relationship (e.g. Supplier, Customer, Partner, etc.) ② in the Master Data. Create a new relationship with Add ③.



Number	Own Number	Company	Relationship Type	From number	Of Own Number	From company
1001019.00		Prosound	Customer	1000003.00	800500701	XY Event Productions
1000010.00		Big Events Inc.	Supplier	1000003.00	800500701	XY Event Productions
1000033.00		SOLA Lighting Rental	Partner	1000003.00	800500701	XY Event Productions
1000003.00	800500701	XY Event Productions	Customer	1000030.00		Portland Crew Support

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.

Lead

Main Data | **Advanced** | Custom Fields | Activities | Campaigns | Blocking Indicator

③ CRM Owner: Brad Casagni Brighton

④ Industry: Eventagency

Status: Hot

The next big thing: ABBA Revival Tour

Source: Meet and Great at summer event

Recommended by: XY Event Productions

Preferred Contact Method: Phone

② Number of Projects per year: 200

Project budget per year: 0

Income: 200.000 USD

No. of employees: 350

Acquisition channel: Campaign

Early Bird: [X]

Newsletter Status: Invited

Convert Save OK Cancel

Creator: Brad Casagni Brighton (08.05.2018 11:35) Last Edited:

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.

Lead

Main Data | Advanced | Custom Fields | **Activities** | Campaigns | Blocking Indicator

Start: 01.05.2018 End: 07.06.2018 Manager: Brad Casagni Brighton Include Groups: [X]

Keyword: [] Only running Activities: []

Start	End	Type	Name	Priority	Direction	Manager	Finalized	Finalized by	Level
08.05.2018	08.05.2018	Presentation of new products		Normal	Outgoing	Brad Casagni Brighton	[]		Lead
08.05.2018	08.05.2018	Invitation		Normal	Outgoing	Andy Schedule Stockholm	[X]	Brad Casagni Brighton	Lead

Add Edit Delete

Attachments

List Preview

Name Description Name Path

Scan execute

Convert Save OK Cancel

Creator: Brad Casagni Brighton (08.05.2018 11:35) Last Edited:

Campaigns

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

Lead

Main Data | Advanced | Custom Fields | Activities | **Campaigns** | Blocking Indicator


Name	Start	End
Newsletter	06.10.2017 13:14	13.10.2017 13:14
Opening city store	03.04.2017 11:19	10.04.2017 11:19

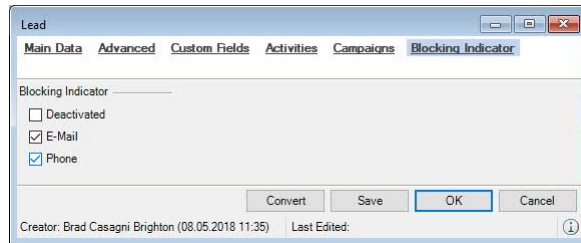
Add Edit

Convert Save OK Cancel

Creator: Brad Casagni Brighton (08.05.2018 11:35) Last Edited:





Blocking indicators

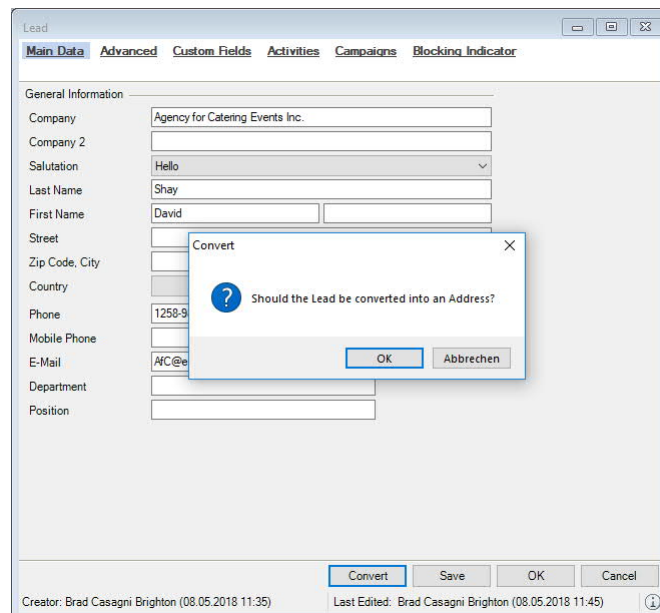
You can activate the same Blocking indicators in the Lead as in the Contact. See also  [Contacts](#) and  [Blocking indicators](#).





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](#)



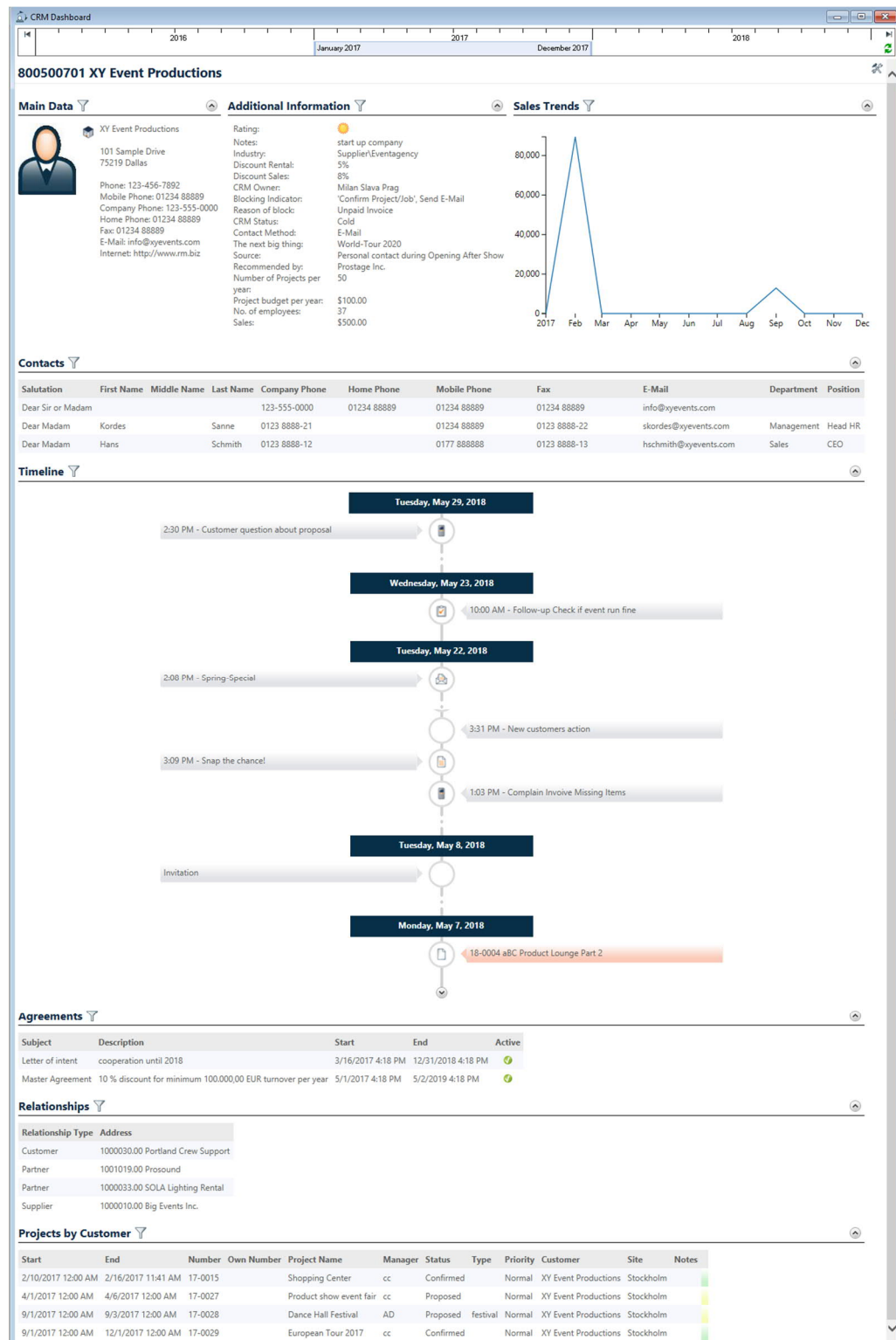
When you create a Project and select a Lead as the customer for it, it is automatically converted into an Address.

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](#).

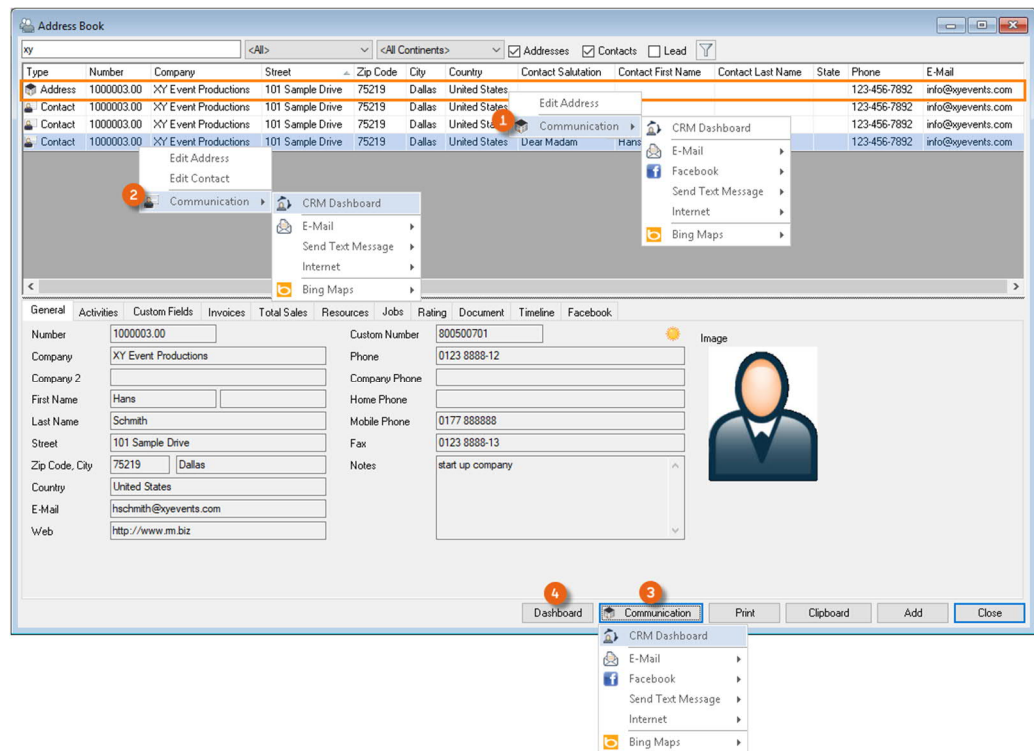
Dashboard

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.

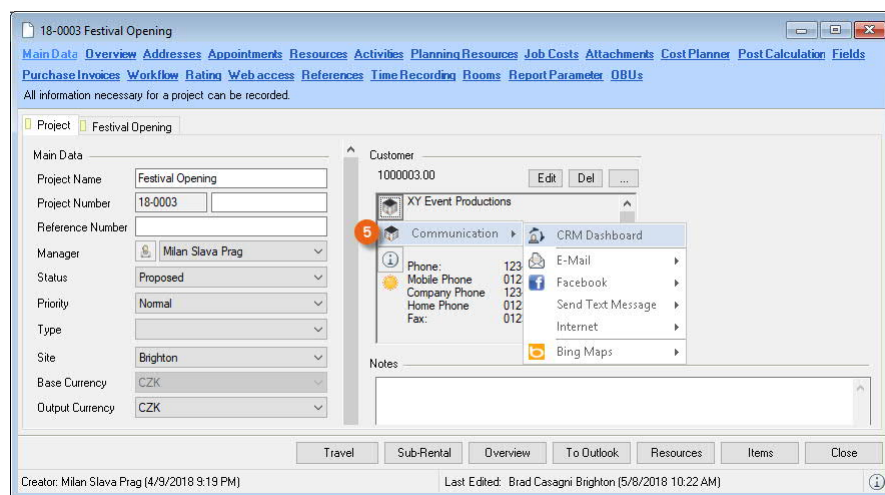


CRM - Dashboard

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:

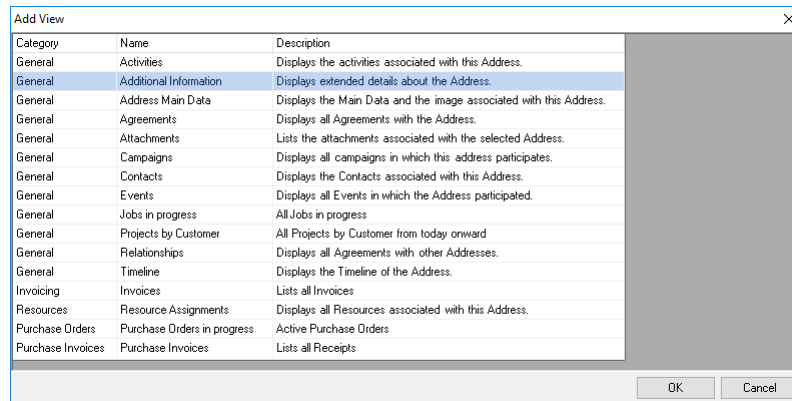
1. easyjob Menu ➡ View ➡ Addresses
2. Select an Address/Contact
3. ➡ Right mouse button ➡ Communication
4. ➡ CRM Dashboard

or

3. ➡ Dashboard button

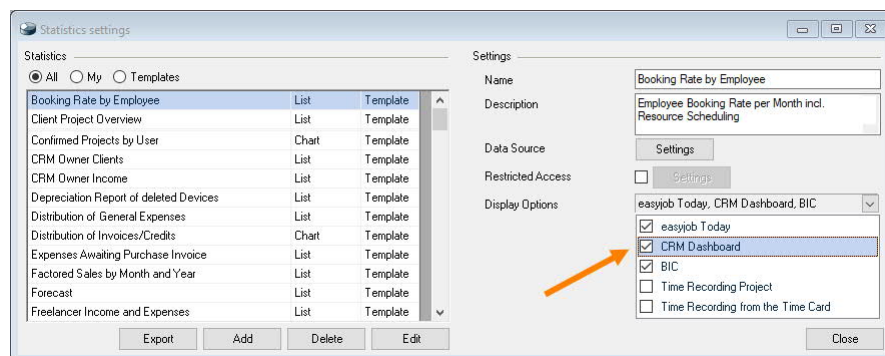
Customizing the Dashboard

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

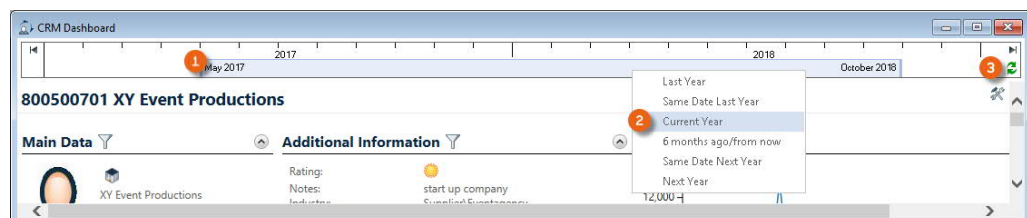
If you use the Business Information Center, you can group the individual reports and display them on the CRM Dashboard.



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

Invoices

Number	Filter	Date	Total	Total incl. Tax	Site	Customer	Currency symbol	Payment Method	Open
17-0011	<input checked="" type="checkbox"/> Open	16/2017	\$5,000.00	\$5,000.00	Stockholm	Prosound Silva Johnson	€	Remit within 30 days	5,000.00
17-0004	<input checked="" type="checkbox"/> Brighton	16/2017	\$89,497.00	\$89,497.00	Stockholm	Prosound Silva Johnson	€	Remit within 30 days	89,497.00
17-0009	<input checked="" type="checkbox"/> Prague	16/2017	\$975.00	\$975.00	Stockholm	Prosound Silva Johnson	€	Remit within 30 days	975.00
	<input checked="" type="checkbox"/> Stockholm								
	<input checked="" type="checkbox"/> Standard								
<div> Copy to Clipboard Copy to Excel </div>									

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.

Main Data

1

XY Event Productions

101 Sample Drive
75219 Dallas

Phone: 123-456-7892
Mobile Phone: 01234 88889
Company Phone: 123-555-0000
Home Phone: 01234 88889
Fax: 01234 88889
E-Mail: info@xyevents.com
Internet: http://www.rm.biz

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

Activities

This displays the Activities for the selected Address.

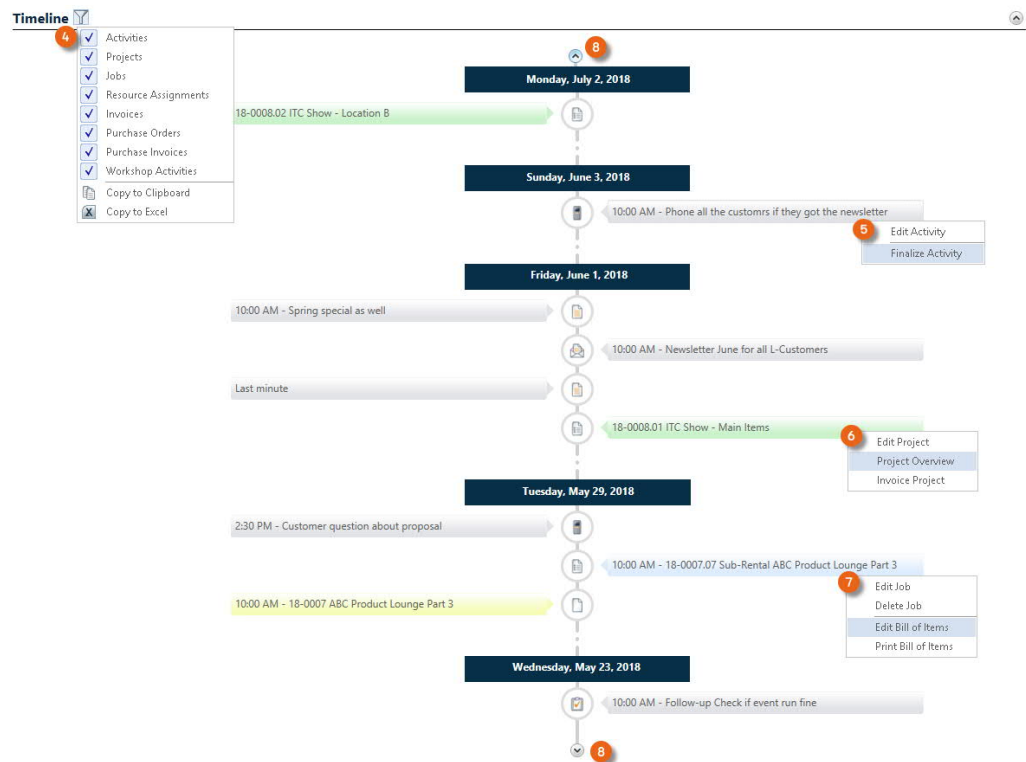
Activities

Start	Filter	Name	Priority	Direction	Finalized	Manager	Regarding	Site	Contact	E-Mail
5/29/2018 2:00	<input checked="" type="checkbox"/> Open	Customer question about proposal	Normal	Incoming		Brad Casagni Brighton	Project: 17-0021 Project Future	Stockholm	Kordes Sanne	
5/23/2018 10:00	<input checked="" type="checkbox"/> Finalized	Check if event run fine	Normal	Outgoing			Project: 17-0013 Summer Revival Festival	Stockholm	Kordes Sanne	
5/22/2018 2:08	<input checked="" type="checkbox"/> Copy to Clipboard	Spring-Special	Normal	Outgoing						
<div> Copy to Excel <div style="margin-left: 20px;"> Edit Activity Finalize Activity </div> </div>										

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

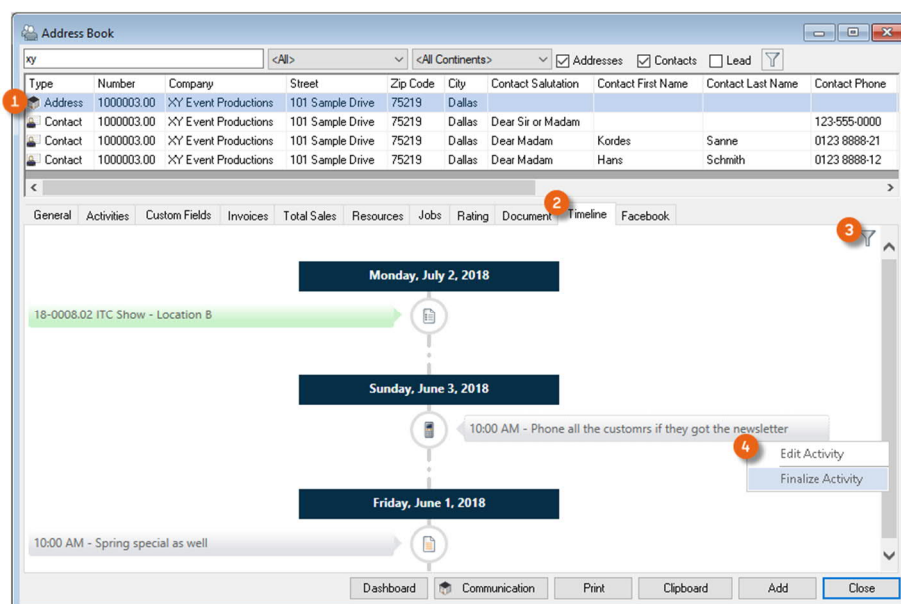
This displays the timeline for the Address.



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.

Attachments

Name	Description	File name	File path
BusinessReport2017		BusinessReport2017.pdf	C:\Users\laheinrich\Documents\BusinessReport2017.pdf
OrganizationPlan	as at October 2017	OrganizationPlan.pdf	C:\Users\laheinrich\Documents\OrganizationPlan.pdf

Edit Link
Execute File

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

Additional Information

This shows additional details about the Address.

Additional Information

Rating:		<input checked="" type="checkbox"/> Rating
Notes:	start up company	<input checked="" type="checkbox"/> Notes
Industry:	Supplier/Eventagency	<input checked="" type="checkbox"/> Industry
Discount Rental:	5%	<input checked="" type="checkbox"/> Discount
Discount Sales:	8%	<input checked="" type="checkbox"/> CRM Owner
CRM Owner:	Milan Slava Prag	<input checked="" type="checkbox"/> Blocking Indicator
Blocking Indicator:	'Confirm Project/Job', Send E-Mail	<input checked="" type="checkbox"/> CRM Status
Reason of block:	Unpaid Invoice	<input checked="" type="checkbox"/> Contact Method
CRM Status:	Cold	<input checked="" type="checkbox"/> The next big thing
Contact Method:	E-Mail	<input checked="" type="checkbox"/> Source
The next big thing:	World-Tour 2020	<input checked="" type="checkbox"/> Recommended by
Source:	Personal contact during Opening After Show	<input checked="" type="checkbox"/> Number of Projects per year
Recommended by:	Prostage Inc.	<input checked="" type="checkbox"/> Project budget per year
Number of Projects per year:	50	<input checked="" type="checkbox"/> No. of employees
Project budget per year:	\$100.00	<input checked="" type="checkbox"/> Sales
No. of employees:	37	<input type="checkbox"/> Copy to Clipboard
Sales:	\$500.00	<input checked="" type="checkbox"/> Copy to Excel

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

Campaigns

This lists all Campaigns in which this Address participates.

Campaigns

Name	Description	Start	End
Summer Special	10 % discount	3/29/2017 2:19 PM	4/5/2017 2:19 PM
Early Bird	5 % discount	1/1/2017 2:20 PM	4/15/2017 2:20 PM

Edit Campaign

Contacts

This shows the Contacts for the selected Address.

Contacts

Salutation	First Name	Last Name	Company Phone	Home Phone	Mobile Phone	Fax	E-Mail	Department	Position
Dear Sir or Madam			123-555-0000	01234 88889	01234 88889	01234 88889	info@xyevents.com		
Dear Madam	Kordes	Sanne	0123 8888-21		01234 88889	0123 8888-22	skordes@xyevents.com	Management	Head HR
Dear Madam	Hans	Schmith	0123 8888-12		0177 888888	0123 8888-13	hschmith@xyevents.com	Sales	CEO

Edit Contact
Communication

Jobs in progress

All Jobs in progress at the moment.

Jobs in progress

Start	End	Job Name	Out In	Manager	Job Type	Status	Service	Customer	Site	Invoiced	Opportunity
4/1/2017 12:00 AM	4/6/2017 12:00 AM	Product show event fair	cc		Rental	Proposed	<None>	XY Event Productions	Stockholm		40.00%
9/1/2017 12:00 AM	9/3/2017 12:00 AM	Dance Hall Festival	AD		Rental	Proposed	<Full>	XY Event Productions	Stockholm		80.00%

Edit Job
Delete Job
Edit Bill of Items
Print Bill of Items

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.

Projects by Customer

Start	End	Project Name	Manager	Status	Type	Priority	Customer	Site	Notes
2/10/2017 12:00 AM	2/16/2017	ing Center	cc	Confirmed		Normal	XY Event Productions	Stockholm	
4/1/2017 12:00 AM	4/6/2017	t show event fair	cc	Proposed		Normal	XY Event Productions	Stockholm	
9/1/2017 12:00 AM	9/3/2017	Hall Festival	AD	Proposed	festival	Normal	XY Event Productions	Stockholm	
9/1/2017 12:00 AM	12/1/2017	an Tour 2017	cc	Confirmed		Normal	XY Event Productions	Stockholm	

Context menu options: Rental, Sub-Rental, Sales, Proposed, Confirmed, Canceled, Copy to Clipboard, Copy to Excel. Action menu options: Edit Project, Project Overview, Invoice Project.

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.

Events

Date	Name	Finalized	User	Campaign	Level	Status
4/3/2017 12:00 AM	Invitation		Clark Cafer Stockholm	Opening city store	Address	Attended
4/3/2017 12:00 AM	Invitation		Clark Cafer Stockholm	Opening city store	Kordes Sanne	Attended
4/3/2017 12:00 AM	Invitation		Clark Cafer Stockholm	Opening city store	Address	Attended

Action: Edit Activity

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.

Relationships

Relationship Type	Address
Customer	1000030.00 Portland Crew Support
Partner	1000033.00 SOLA Lighting Rental
Supplier	1000010.00 Big Events Inc.

Agreements

It shows all existing agreements with the customer.

Agreements

Subject	Description	Start	End	Active
Letter of intent	cooperation until 2018	3/16/2017 4:18 PM	12/31/2018 4:18 PM	Active
Master Agreement	10 % discount for minimum 100.000,00 EUR turnover per year	5/1/2017 4:18 PM	5/2/2019 4:18 PM	Active

Action: Edit Agreement

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

Invoices

This lists all invoices

Invoices

Number	Mail	Open	Total	Total Incl. Tax	Finalized	Site	Company	Customer	Manager	Payment Method	Payment Date	Open
17-0011	CAI	Standard	17	\$5,000.00	\$5,000.00	Stockholm	Standard	Prosound Silva Johnson	Cafer Clark	Remit within 30 days	3/18/2017	5,000.00
17-0004	Shd	Copy to Clipboard	17	\$89,497.00	\$89,497.00	Stockholm	Standard	Prosound Silva Johnson	Cafer Clark	Remit within 30 days	3/18/2017	89,497.00
17-0009	Sun	Copy to Excel	17	\$975.00	\$975.00	Stockholm	Standard	Prosound Silva Johnson	Cafer Clark	Remit within 30 days	3/18/2017	975.00
17-0014	Big Art Show		3/17/2017	\$299,974.35	\$299,974.35	Stockholm	Standard	Prosound Silva Johnson	Cafer Clark	Remit within 30 days	4/16/2017	299,974.35
17-0015	Late Night Action Show		3/17/2017	\$18,655.00	\$18,655.00	Stockholm	Standard	Prosound Silva Johnson	Cafer Clark	Remit within 30 days	4/16/2017	18,655.00
17-0016	Theater School Days		3/17/2017	\$1,328.20	\$1,328.20	Stockholm	Standard	Prosound Silva Johnson	Cafer Clark	Remit within 30 days	4/16/2017	1,328.20

Action: Edit Invoice

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.

Resource Assignments									
Number	Process		Start	End	Site	Status	Job Type	Resource	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Rental	4/5/2018 10:00 AM	4/5/2018 8:00 PM	Stockholm	Confirmed	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Sub-Rental	7/1/2018 10:00 AM	7/1/2018 6:00 PM	Stockholm	Confirmed	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Sales	8/1/2018 8:00 PM	8/2/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Purchase Order	8/2/2018 8:00 PM	8/3/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Workshop	8/3/2018 8:00 PM	8/4/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Proposed	8/4/2018 8:00 PM	8/5/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Confirmed	8/5/2018 8:00 PM	8/6/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Canceled	8/6/2018 8:00 PM	8/7/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Brighton	8/7/2018 8:00 PM	8/8/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Prague	8/8/2018 8:00 PM	8/9/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Stockholm	8/9/2018 8:00 PM	8/10/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input type="checkbox"/> Copy to Clipboard	8/10/2018 8:00 PM	8/11/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festi	<input checked="" type="checkbox"/> Copy to Excel	8/11/2018 8:00 PM	8/12/2018 6:00 PM	Stockholm	Requested	Rental	Finn George	
17-0013.01	Summer Revival Festival	1.00	Tour Manager	8/9/2018 8:00 PM	8/10/2018 6:00 PM	Stockholm	Requested	Rental	Finn George
17-0013.01	Summer Revival Festival	1.00	Tour Manager	8/10/2018 8:00 PM	8/11/2018 6:00 PM	Stockholm	Requested	Rental	Finn George
18-0001.04	Daily Session	1.00	Tour Manager	9/3/2018 10:00 AM	9/3/2018 10:00 PM	Stockholm	Confirmed	Rental	

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

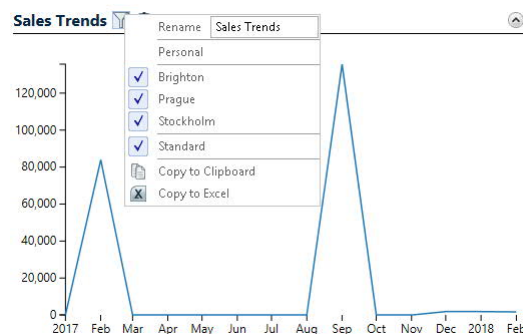
All Purchase Orders currently in progress.

Purchase Orders in progress									
Date of Order	Delivery Date		Supplier	Total	Description	Manager	Status	Type	Site
2/14/2017 2:51 PM	2/14/2017 2:51 PM	<input checked="" type="checkbox"/> Not ordered	er Prolyte	Prosound	\$500.00	cc	Not ordered	Buying	Stockholm
2/14/2017 2:57 PM	2/14/2017 2:57 PM	<input checked="" type="checkbox"/> Ordered	er Prolyte	Prosound	\$200.00	cc	Not ordered	Buying	Stockholm
2/17/2017 1:07 PM	2/24/2017 1:06 PM	<input checked="" type="checkbox"/> Confirmed	er Prolyte	Prosound	\$1,660.00	cc	Not ordered	Buying	Stockholm
		<input checked="" type="checkbox"/> Closed							
		<input checked="" type="checkbox"/> Declined							

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.

Sales overview							
	Proposed	Confirmed	Invoices	Sub-Rentals	Purchase Orders		
2016	795.00	245,202.51	416,404.55	0.00	0.00		
2017	795.00	221,467.36	416,404.55	0.00	0.00		

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.

Type	Name	Start	End	Manager	Duration	Priority	Quantity	Finalized	Percent
Document	Spring special as well	6/1/2018	6/1/2018	Brad Casagni Brighton	0	Normal	16	0	0.00%
Document	Phone all the customers if they got the newsletter	6/3/2018	6/3/2018	Brad Casagni Brighton	0	Normal	16	0	0.00%
Document	Newsletter June for all L-Customers	6/1/2018	6/1/2018	Brad Casagni Brighton	0	Normal	16	16	100.00%

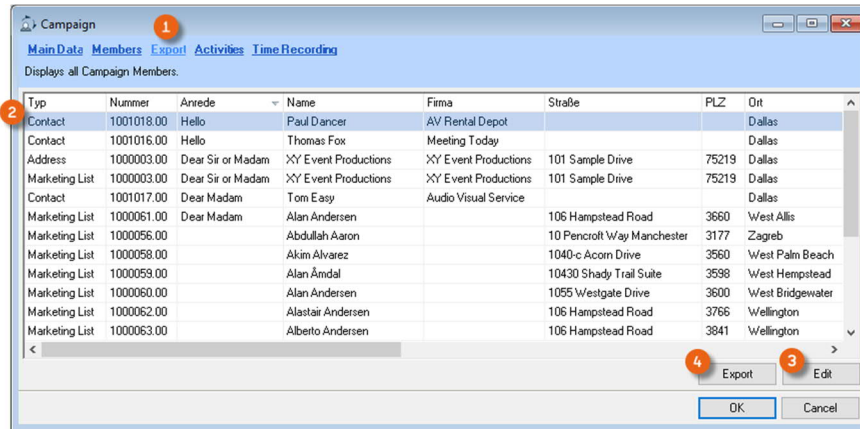
Members

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](#).

Type	Number	Name	Country
Address	1000003.00	XY Event Productions	United States
Contact	1001017.00	Tom Easy	United States
Contact	1001018.00	Paul Dancer	United States
Contact	1001016.00	Thomas Fox	United States

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.

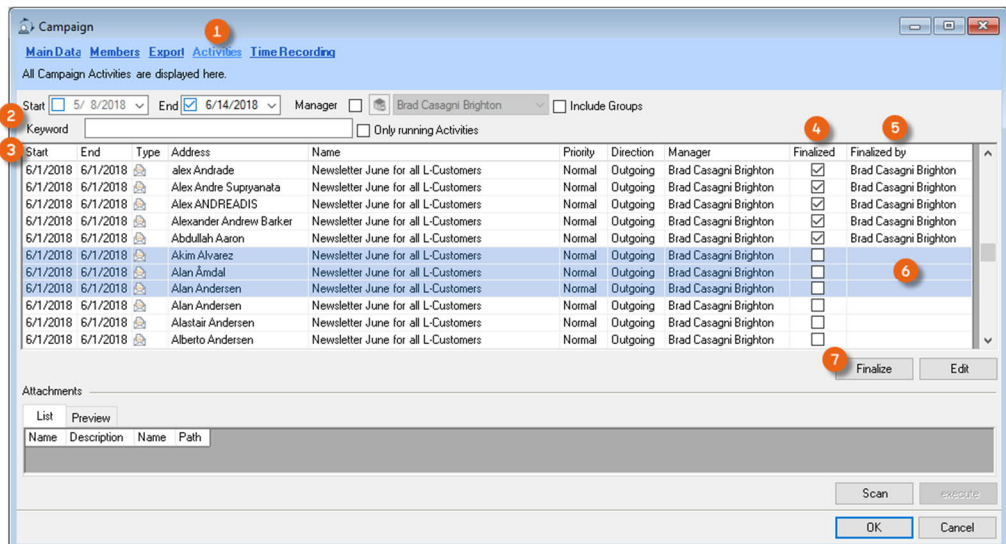


Exporting the Member List:

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.

Status	Name	Member	Quantity
Accepted			1
Invitation			1
Accepted	Invitation	800500701 Kordes Sanne	1
Attended			1
Invitation by mail			1
Attended	Invitation by mail	1000967.00 Yasser Zippo	1
Invitation declined			1
Invitation by mail			1
Invitation declined	Invitation by mail	1000553.00 Lee McCowan	1
No response			1
Invitation			1
No response	Invitation	1000030.00 Portland Crew Support	1
Nominated			945
Invitation			945

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.

The screenshot shows a 'Campaign' window with tabs for Main Data, Members, Export, Activities, and TimeRecording. The 'Activities' tab is active, displaying a table with the following data:

Type	Name	Start	End	Manager	Duration	Priority	Quantity	Finalized	Percent
	Last minute	6/1/2018	6/1/2018	Brad Casagni Brighton	0	Normal	16	16	100.00%

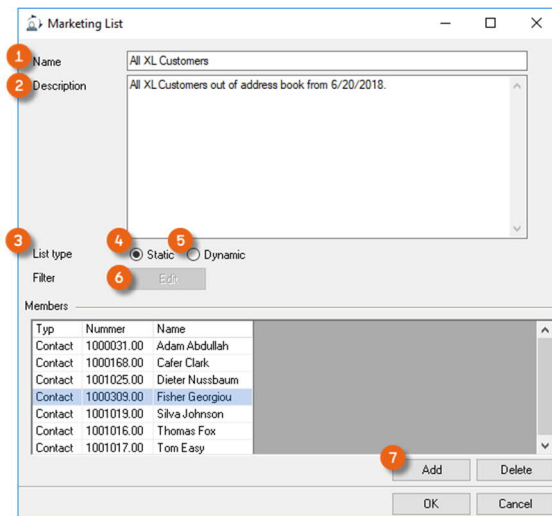
Below the table are buttons for 'Run', 'Add', 'Edit', 'Delete', 'OK', and 'Cancel'. The 'Run' button is highlighted.

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.

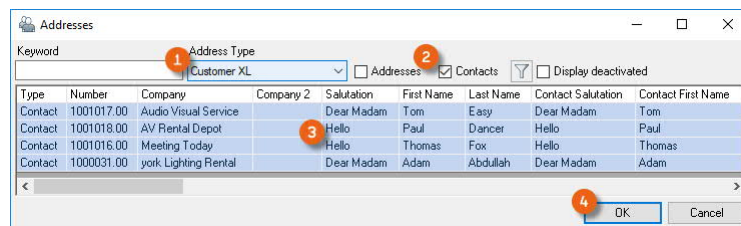
When creating a market list enter a Name ①, Description ②, if it is a Static ④ or Dynamic ⑤ List type ③, and for dynamic lists, a Filter ⑥. Select the Address with Add ⑦.



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.

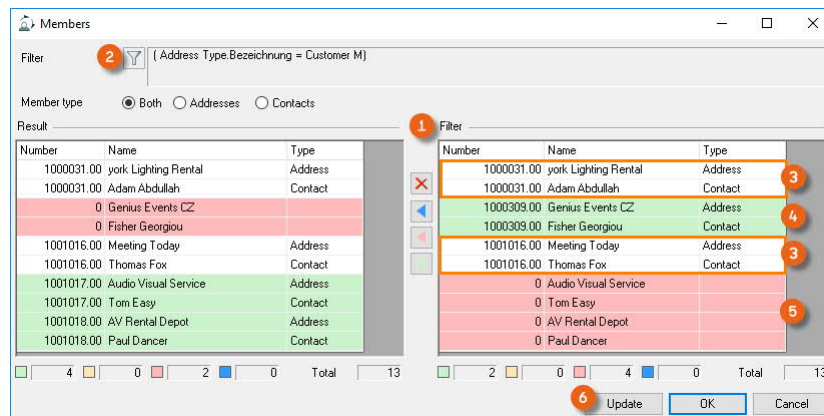
8. ➡ Add ⑤ ➡ Ok ⑥

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

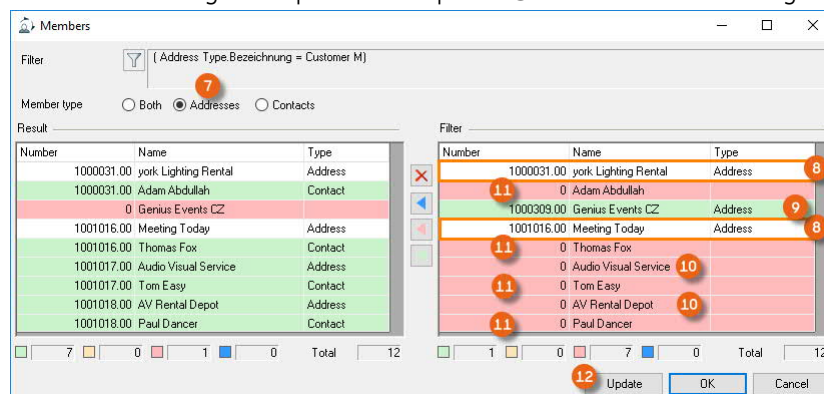
Before you can start a campaign with the dynamic marketing list, you can check if anything has changed with the member group (e.g. there is a new M type customer, or customers who are no longer M type customers, or you would like to use the main contact for the Address and not the individual Contacts).

Editing the dynamic marketing list:

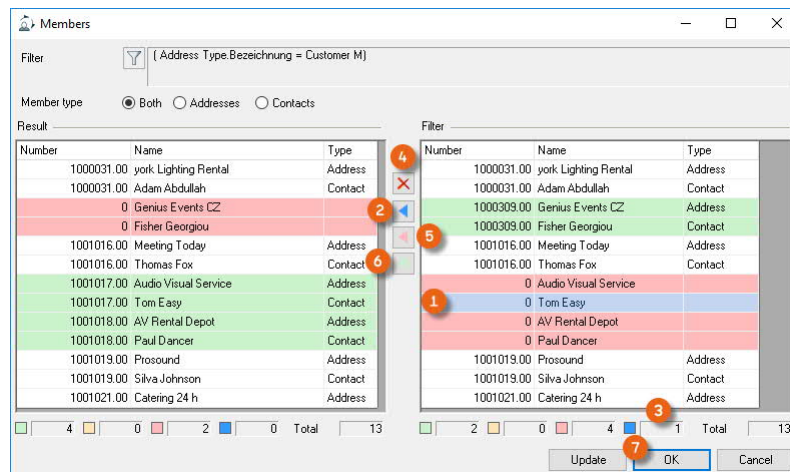
1. easyjob Menu ➡ Master Data ➡ Marketing lists
2. Select the list to be edited (e.g. all M-customers)
3. ➡ Edit
4. Filter ➡ Edit



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.



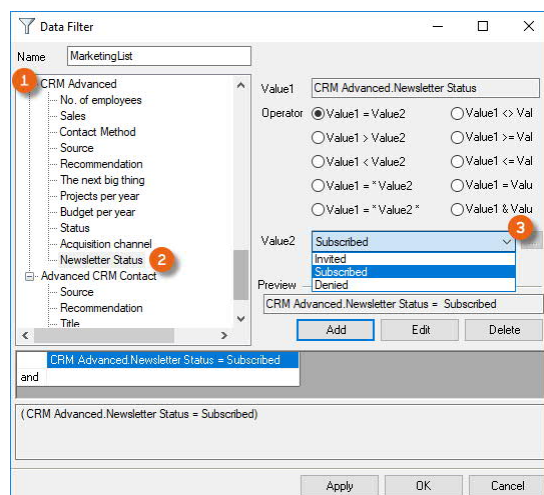
If, for example, you want to use only Addresses and no Contacts in your marketing list, select the Member type (in this example, Addresses ⑦). The filter will be used and displays which Addresses were originally in the list and still apply for the filter ⑧, Addresses that were newly added are marked 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.