

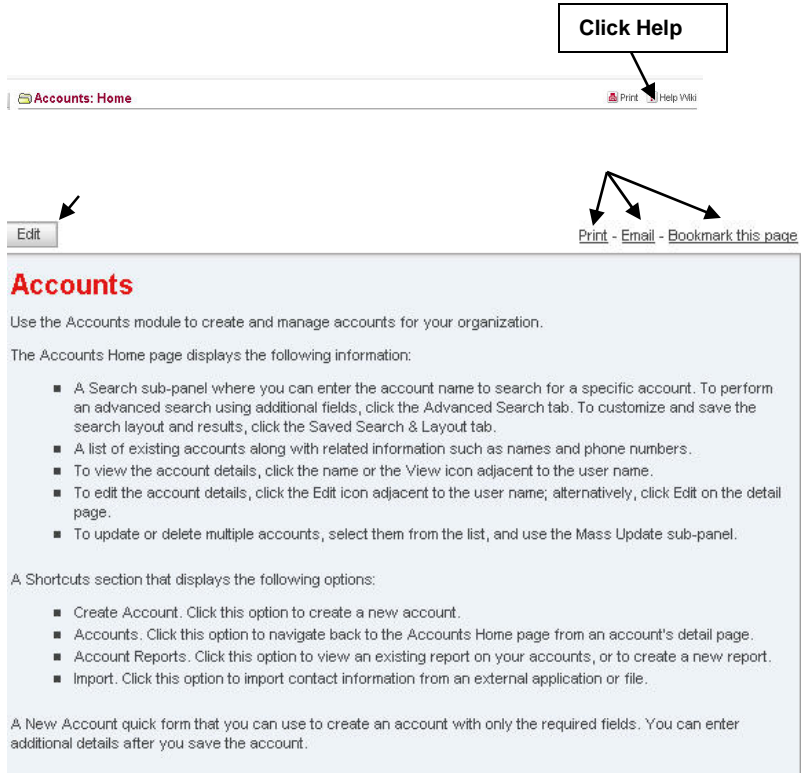
## ProStar CRM 1.3 New Enhancements:

### Help:

- Help is now available from most modules.

### Using Help:

- Click on the Module you need to work with.  
In this example, we clicked Accounts.
- Click Help.



- A Help screen displays that walks you through the steps required to perform that particular function; such as creating/editing an account.

### From here, you can:

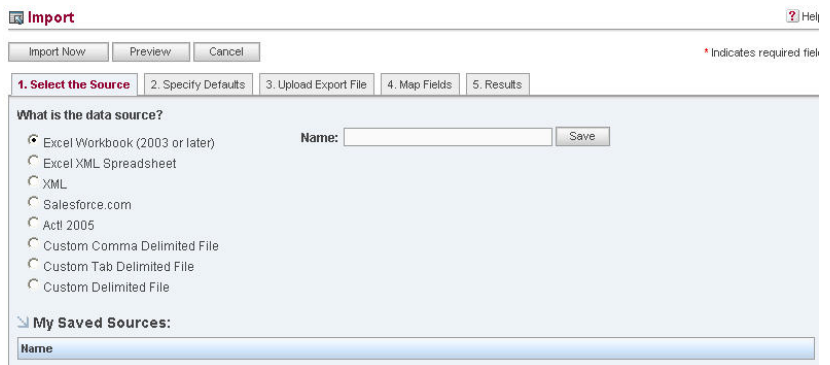
1. **Click Edit** to change make changes to the help text.  
**Caution** needs to be taken so you do not change required steps.
2. **Click Print** to print the Help Screen to local printer.
3. **Click Email** to email this page to another user.
4. **Click Bookmark** to add this page to your Browser favorites.

### Import/Export:

The Import / Export feature applies to the core modules. You can import an XML Spreadsheet, raw XML and Comma Delimited files. You can also import an entire SugarCRM database. The Import feature was designed to allow default values for any field not part of the import data.

- You can import files directly into the CRM from any of the below formats:

- ✓ Excel Workbook (2003 or later)
- ✓ Excel XML
- ✓ XML
- ✓ Salesforce.com
- ✓ Act! 2005
- ✓ Custom Comma Delimited File
- ✓ Custom Tab Delimited File
- ✓ Custom Delimited File



## Import (Continued):

- Import is available from the several modules within the CRM. **Some are those modules are listed below.** You need to be aware that some fields are required in order to have a successful import.

- ✓ **Accounts**

**Required field:** Account Name (Company name) must be filled in completely on file to import.

- ✓ **Contacts**

**Required field:** Last Name on file to import must be filled in completely on file to import.

- ✓ **Opportunities**

**Required Fields:** Opportunity Name and Account Name (Company Name) must be filled in completely on file to import.

### To Import a file:

**NOTE:** Your file to be imported **MUST** be easily accessible.

These directions are for importing a file to Accounts. You would follow these same procedures for importing to Contacts, Opportunities and other modules.

1. **Select Module** in CRM for import.
2. Click Import from **Shortcuts**.
3. **Enter a Name** in the Name field for your import. (For documentation purposes, we entered Test.)

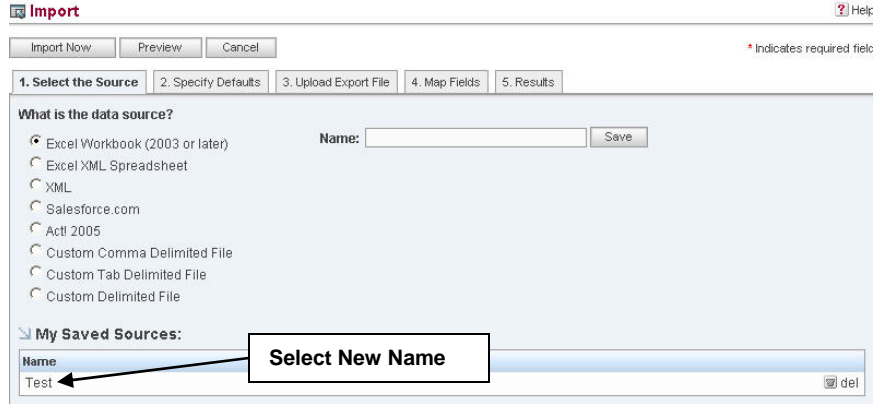
The screenshot shows the 'Import' window with the following elements:

- Buttons: Import Now, Preview, Cancel
- Progress indicators: 1. Select the Source, 2. Specify Defaults, 3. Upload Export File, 4. Map Fields, 5. Results
- Section: What is the data source?
- Radio buttons for data sources:
  - Excel Workbook (2003 or later)
  - Excel XML Spreadsheet
  - XML
  - Salesforce.com
  - Act! 2005
  - Custom Comma Delimited File
  - Custom Tab Delimited File
  - Custom Delimited File
- Name field: Test
- Save button
- Section: My Saved Sources:
 

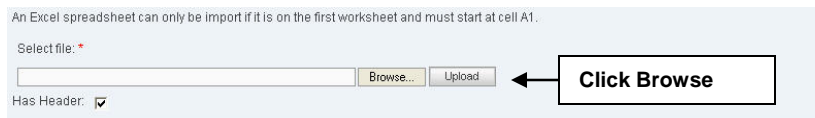
| Name |
|------|
|      |

To Import a file (Continued):

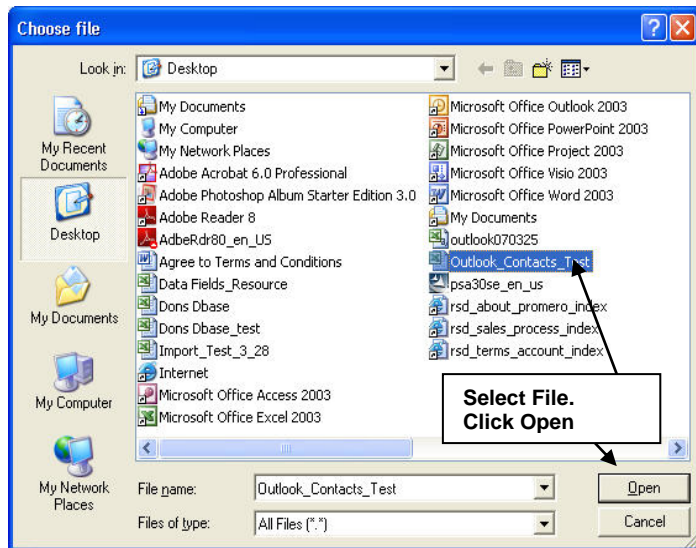
- 4. **Double Click Name** from My Saved Sources (this is the name you identified in above step).
- 5. Leave Header checked if your file contains headers.



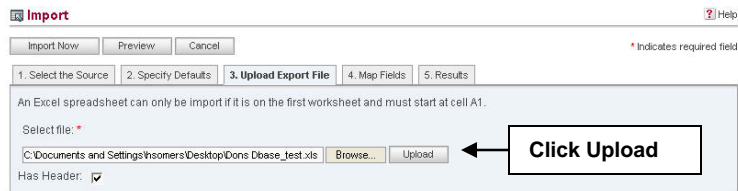
- 6. **Click Browse.**



- 7. **Select the file** to import.
- 8. **Click Open** in the Chose File Window.



- 9. **Click Upload.**

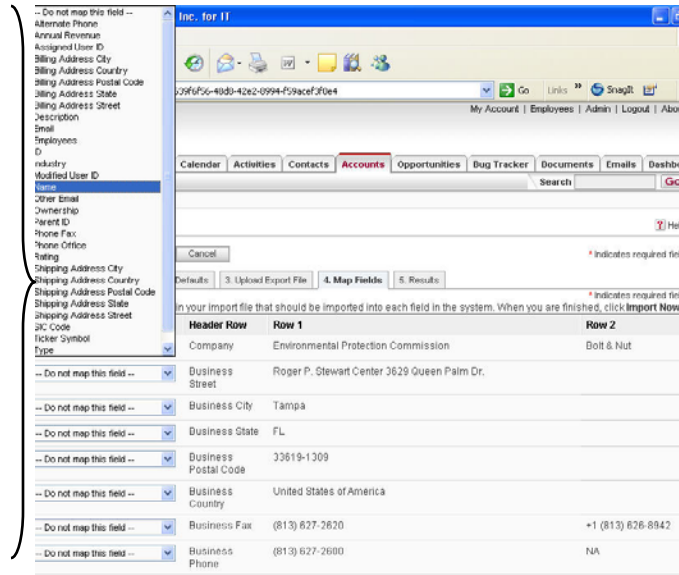


**To Import a file (Continued):**

10. **You need to Map** the fields from your file to the fields in the CRM
11. **Click down arrow in Database Field** and select name that best matches the name in Header Row.

**Note:** For Company, we mapped it to Name.

12. **Continue mappings** until all fields are mapped.  
**NOTE:** If the CRM does not have a field matching your field, select **Do not map this field**.

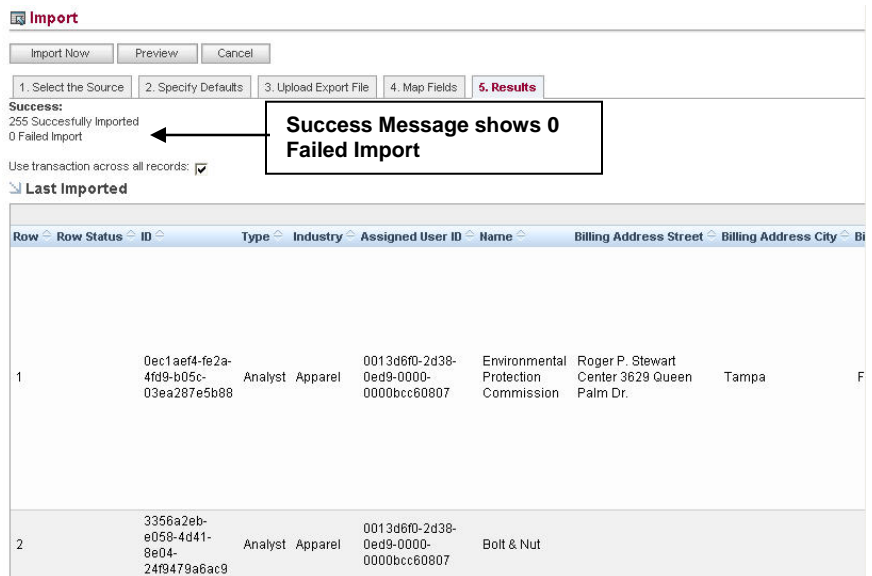


13. **Click Import Now**



14. A **Success screen** is displayed showing your new import when import is completed display the number of records successfully imported and, if any, the number that failed..

**NOTE:** If Success message shows failures, **none** of your records were imported. You must fix the problem and do another import.



**Possible errors could be:**

- **Account Import:** Rows containing blank **Company name** (Account) in uploaded file.
- **Contact Import:** Rows containing blank **Last Name** in uploaded file.
- **Opportunity Import:** Rows containing blank Opportunity Name and Account Name in uploaded file.

## Import and Linking Modules:

1. If you need to associate multiple records together such as linking Contacts to Accounts, you need to use GUIDs. (<http://en.wikipedia.org/wiki/GUID>)
2. Since the use of GUID's requires some technical background, Promero may assist with these imports.
3. When importing records together, you need to follow certain rules in order for us to link them together properly:
  - You need to provide all mapping information. The mapping information we need is as follows:
    - ✓ **To import into Contacts**, there MUST be **no blanks** in the last name in your file.
    - ✓ **To import to Accounts**, the account name or company name MUST contain **no blank fields**.
    - ✓ **To import to Opportunities**, there MUST be **no blanks** in the Opportunity Name and Account Name (Company Name) in your file.

All of the above fields are required fields in the CRM. To ensure you have all the required information contained within your file, review the Module within the CRM to ensure all required fields are identified and complete in your file. For example, look at the Account Screen in the CRM to ensure your file contains similar fields. Below is an example of how the mapping should match from your file to the CRM.

CRM Fields importing to Accounts

Fields in your File

| Database Field              | Header Row           | Row 1                                       | Row 2             |
|-----------------------------|----------------------|---|-------------------|
| Name                        | Company              | Environmental Protection Commission         | Bolt & Nut        |
| Billing Address Street      | Business Street      | Roger P. Stewart Center 3629 Queen Palm Dr. |                   |
| Billing Address City        | Business City        | Tampa                                       |                   |
| Billing Address State       | Business State       | FL  |                   |
| Billing Address Postal Code | Business Postal Code | 33619-1309                                  |                   |
| Billing Address Country     | Business Country     | United States of America                    |                   |
| -- Do not map this field -- | Business Fax         | (813) 627-2620                              | +1 (813) 626-8942 |
| Phone Office                | Business Phone       | (813) 627-2600                              | NA                |
| -- Do not map this field -- | Mobile Phone         |   |                   |
| -- Do not map this field -- | Other Fax            |   |                   |
| -- Do not map this field -- | Other Phone          |   |                   |
| -- Do not map this field -- | Pager                |   |                   |
| -- Do not map this field -- | Primary Phone        |   |                   |
| -- Do not map this field -- | Radio Phone          |   |                   |
| -- Do not map this field -- | TTY/TDD Phone        |   |                   |

**Company in your file maps to Name in CRM**

**Business Street in your file maps to Billing Address Street in CRM**

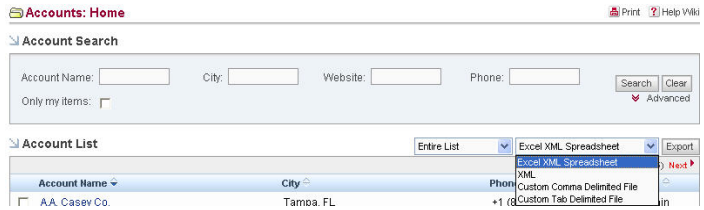
**If you are unsure of a mapping, check the module (such as the Account tab) in the CRM.**

**Where your file does not contain a matching field in the CRM, leave it to Do not map this field.**

## Export


- You can export files from the CRM to such formats as:

- ✓ Excel XML Spreadsheet
- ✓ XML
- ✓ Custom Comma Delimited File
- ✓ Custom tab Delimited

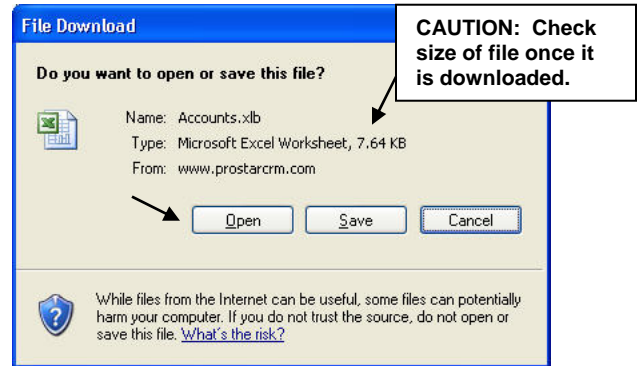


- Export is available from the most **Modules**.

### To Export from the CRM:

- Select the Module you want to export (i.e.; Accounts)
- Click Export 
- A File Download window display.
- Click Open. (Recommend you open the file prior to saving to ensure it is what you want)

**Caution:** Look at the type in the File Download window to ensure the file will not cause system problems due to its size.



- The downloaded Accounts displays in the format you selected. For documentation purposes, we chose Excel XML Spreadsheet format.

### CRM Accounts Imported into Excel

|   | A                                    | B               | C            | D            | E         | F         | G       | H                   | I      | J      |
|---|--------------------------------------|-----------------|--------------|--------------|-----------|-----------|---------|---------------------|--------|--------|
| 1 | id                                   | name            | phone_office | phone        | phone_fax | phone_alt | website | email1              | email2 | annual |
| 2 | FE90660F-091A-4C0E-9E84-3CA235F8C4F0 | House of Plants | 954-935-8800 | 954-935-8800 |           |           |         | jsullivan@yahoo.com |        |        |
| 3 |                                      |                 |              |              |           |           |         |                     |        |        |

- Recommend that you **delete column A (ID)**, as this column is system generated and used only for tracking purposes within the CRM.
- Within Excel, Click File and Save As to save the file to your local drive.

## Teams:

Team Management applies to almost all the modules. You can now control who sees what at a record level. You can limit users to view certain information and avoid exposing all information to them.

### Creating Teams:


#### a. Create Users:

1. Click **Create User** from Shortcuts Menu
2. Enter User first name
3. Enter User last name
4. Enter User Name

**NOTE:** For documentation purposes we entered Agent as first name, Test1 as last name and test1 for user name.

#### b. Identifying Who a User Reports To:

1. Scroll down page to User Settings
2. Click **Change** in Reports To: setting and **Select** who this user reports to. We selected Agent Test Supv.
3. Scroll to top of page.
4. Click **Change Password** and assign user a password.

5. Click **Save.** 
6. You will be returned to the Users Home Window.
7. Repeat steps a. and b. until you have created all users.

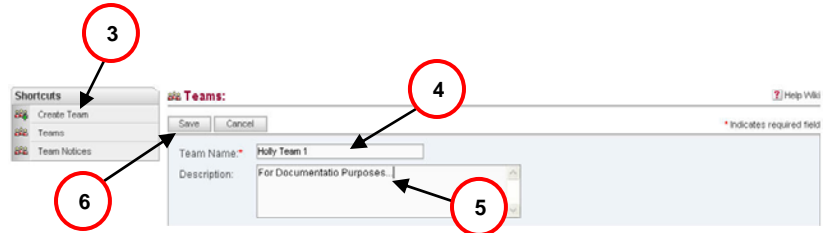
**NOTE:** We created Agent Test Supv, Agent Test1 and Agent Test2 for documentation purposes

**HINT:** It is always recommended that you fill in as much information regarding this user as possible, for documentation purposes we only filled in the required fields.

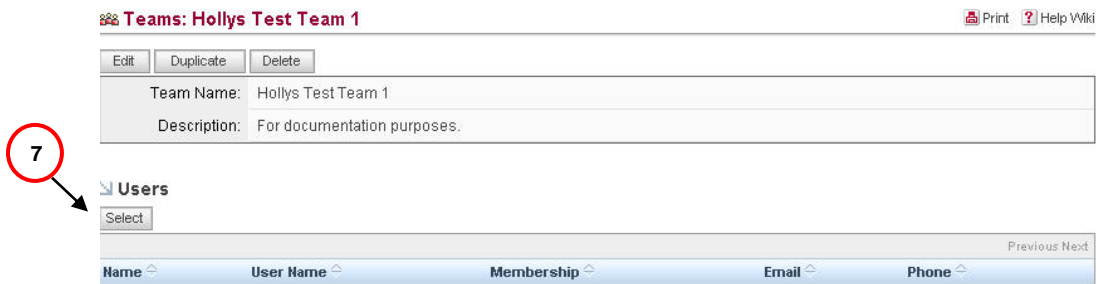
**c. Creating Teams and Assigning Users:**

**Note:** You do not need to add supv/manger to team; the system automatically adds them based on who you assigned them to in above Step b.

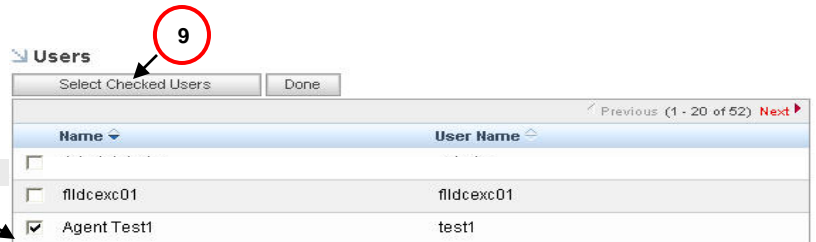
1. **Click Admin**
2. **Click Team Management**
3. **Click Create Team** from Shortcuts menu
4. **Enter name** for new team in Team Name field. For documentation purposes, we entered Holly Team 1.
5. **Enter a description** for this new team.
6. **Click Save.**  
The Teams window displays showing your new team.



7. **Click Users.**

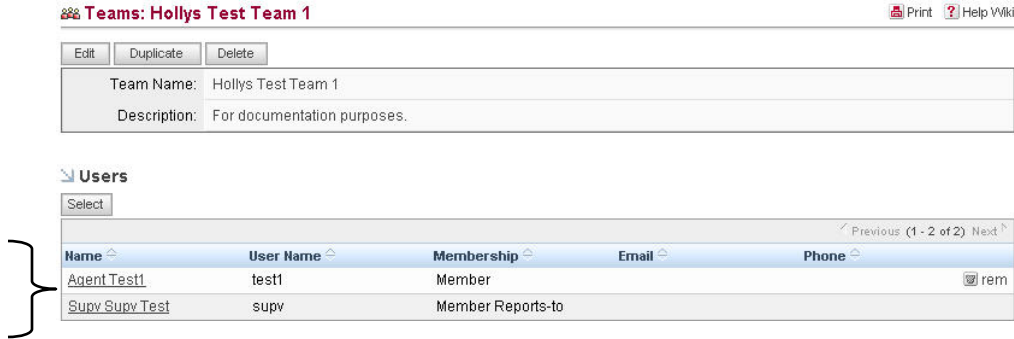


8. Check users from list of available users.
9. Click Select Checked Users.
10. Repeat steps 3 through 9 until you have added users to **all new teams.**
11. Your new team will be displayed showing users assigned to that team.



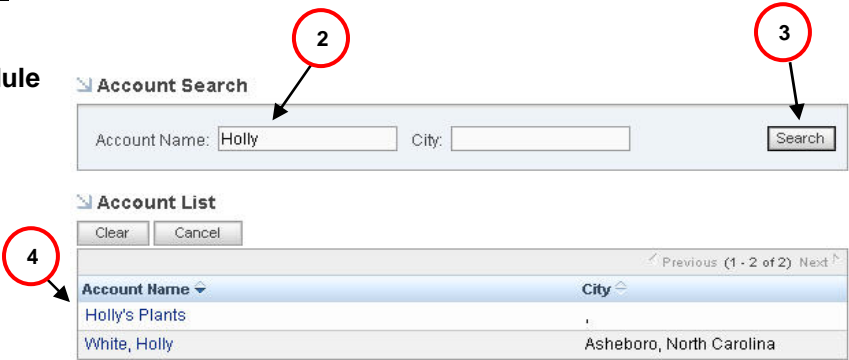
**c. Creating Teams and Assigning Users:**

**NOTE:** We only select Agent Test1 from the user list in above Step 9, but Supv is also listed as a user. This is because teams automatically assigns whoever you identify the user reporting to in the User Management tool.

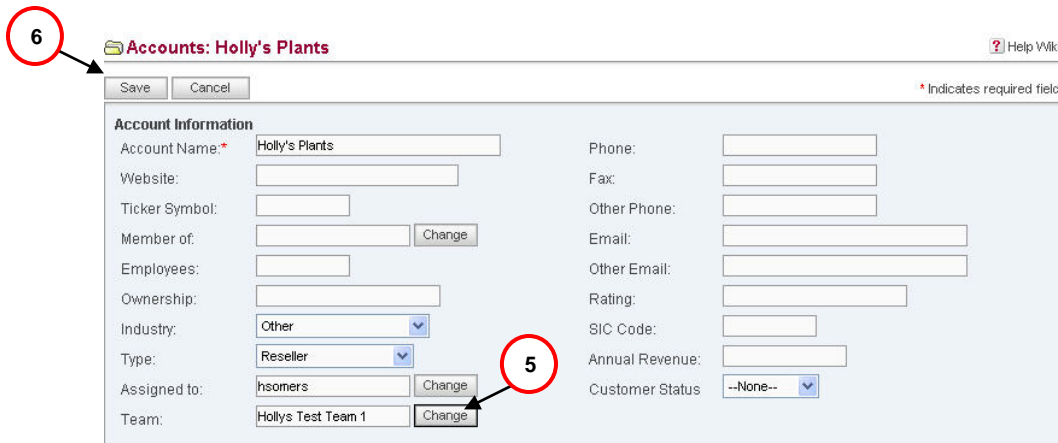


**d. Assigning Teams to Existing Accounts:**

- 1. Click Accounts Tab Module
- 2. Enter Account Name in Account Search Window
- 3. Click Search
- 4. Double click on Account Name



- 5. Click Edit.
- 6. Click Change in Team field and select Team from list.
- 7. Click Save.



**NOTE:** This account will only be visible to the team it is assigned to.

**e. Assigning Teams to New Accounts:**

1. Click Accounts Tab Module.
2. Create a new Account in Shortcuts menu.
3. Enter Account Name.
4. Click Change and Select Team.
5. Click Save.

The screenshot shows the 'Accounts: Holly's Plants' form in a CRM system. The form is divided into several sections. On the left, there is a 'Shortcuts' menu with three items: 'Create Account', 'Accounts', and 'Import'. An arrow labeled '2' points to the 'Create Account' item. The main form area has a title bar with 'Accounts: Holly's Plants' and a 'Help Wiki' link. Below the title bar are 'Save' and 'Cancel' buttons. The form is titled 'Account Information' and contains various fields for account details. An arrow labeled '3' points to the 'Account Name' field, which contains the text 'Holly's Plants'. Below this are fields for 'Website', 'Ticker Symbol', 'Member of', 'Employees', 'Ownership', 'Industry' (set to 'Telecommunications'), 'Type' (set to 'Customer'), 'Assigned to' (set to 'Supv Supv Test'), and 'Team' (set to 'Hollys Test Team 1'). Each of these last four fields has a 'Change' button next to it. An arrow labeled '4' points to the 'Change' button for the 'Team' field. On the right side of the form, there are fields for 'Phone', 'Fax', 'Other Phone', 'Email', 'Other Email', 'Rating', 'SIC Code', 'Annual Revenue', and 'Customer Status' (set to '--None--'). An arrow labeled '5' points to the 'Save' button at the top left of the form area.

**HINT:** It is always recommended that you fill in as much information regarding this user as possible, for documentation purposes we only filled in the required fields.

**NOTE:** This account will only be visible to the team it is assigned to.