The Right Technology, the Right Results

ProStar CRM V1.4

Release Notes

September 2007

Learning Services
Promero

Preface

This document provides an overview of the new features available in the newest release of ProSarCRM V1.4

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AJAX used in CRM

Short for Asynchronous JavaScript and XML, it is a term that describes a new approach to using a number of existing technologies together, including the following: HTML or XHTML, Cascading Style Sheets, JavaScript, the Document Object Model, XML, XSLT, and the XMLHttpRequest object. When these technologies are combined in the Ajax model, Web applications are able to make quick, incremental updates to the user interface without reloading the entire browser page. AJAX is a technique for updating web pages without having to refresh the entire page. This will allow the user interface to work more efficiently in the future.

In this version of ProStarCRM users may notice that the order management area utilizes this new technique to provide a more conducive user experience. In the past whole pages refreshed when an update was made. Now when a user selects the update to a quote or order, new rows of data are added and math is performed in only the area of the screen that is needed.

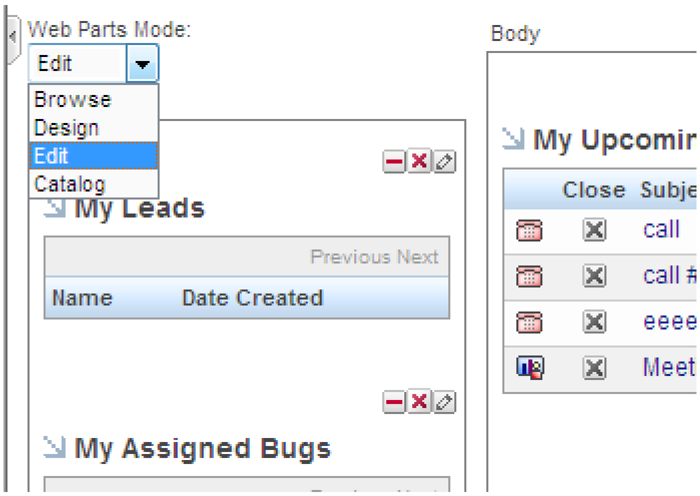
As additional updates are made users will see this technology used in other areas that also use this newer technology to make the product use more seamless and efficient.

WebParts

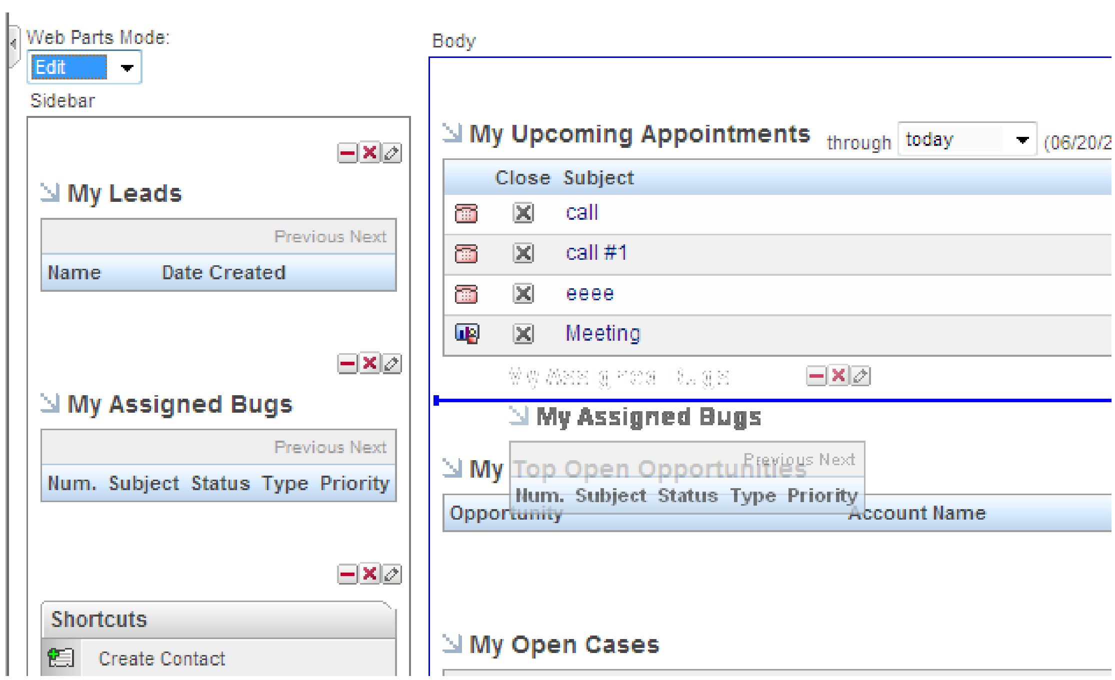
Webparts allow users to modify the layout of pages in the CRM. Most specifically the Home Page.

To rearrange and customize Webparts

1. Select Edit in the Webparts control
2.



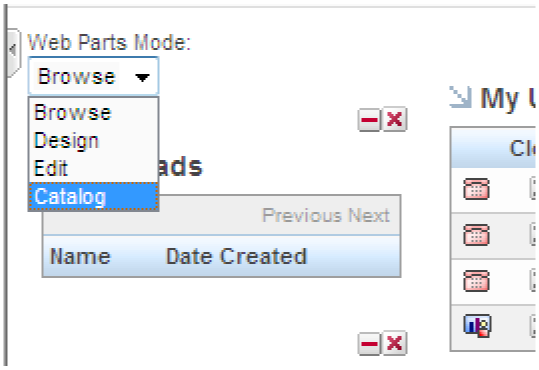
3. To rearrange the position of a Webpart on the Home page, point the cursor at the Webpart title, drag it to its new position, and release.



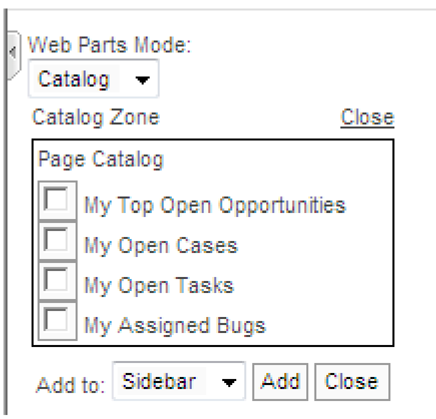
4. To customize a Webpart, click the Edit icon adjacent to its name.

To add a Webpart

1. On the Home page, select Catalog from the Webpart control



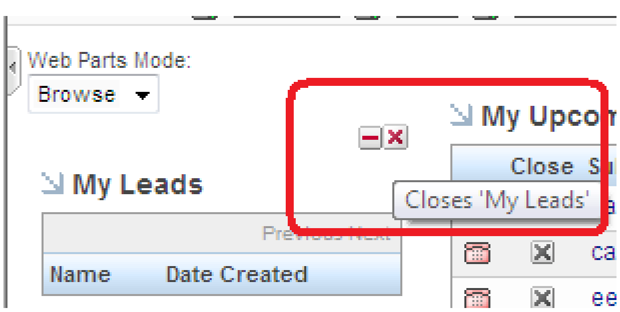
2. This will display the Catalog of parts available to add.
3. Choose the Webpart you wish to add to your Home Page



4. Select the location
5. Click **ADD**.

To remove/hide a Webpart

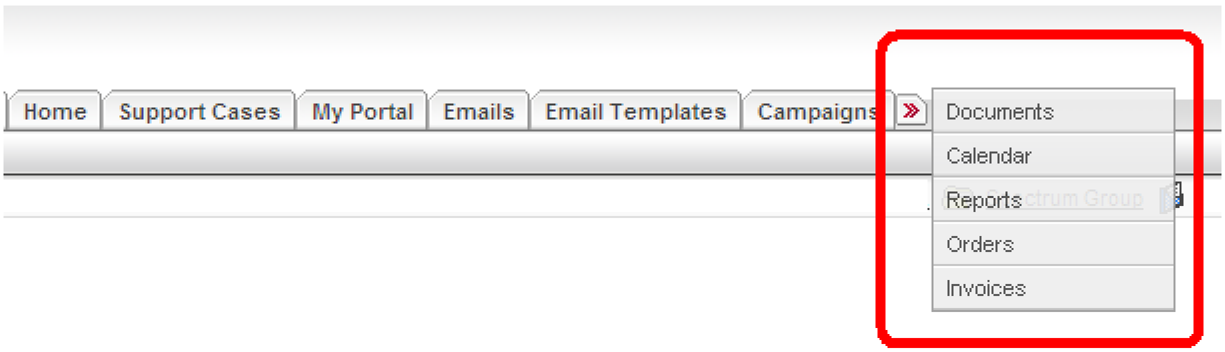
1. On the Home page, click on this X icon to the top right of the webpart



Maximum Tabs

In this version of ProStar CRM, the maximum number of Tabs is limited to prevent the need to scroll horizontally.

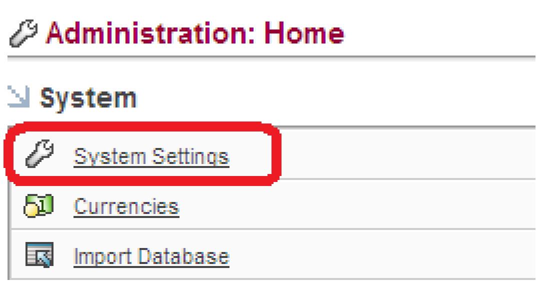
To use this new feature, move your mouse over the double right arrow on the last Tab:



You will see a dropdown control appear that shows the hidden tabs (if any) which can be selected with a mouse click.

To Modify the Maximum Tabs

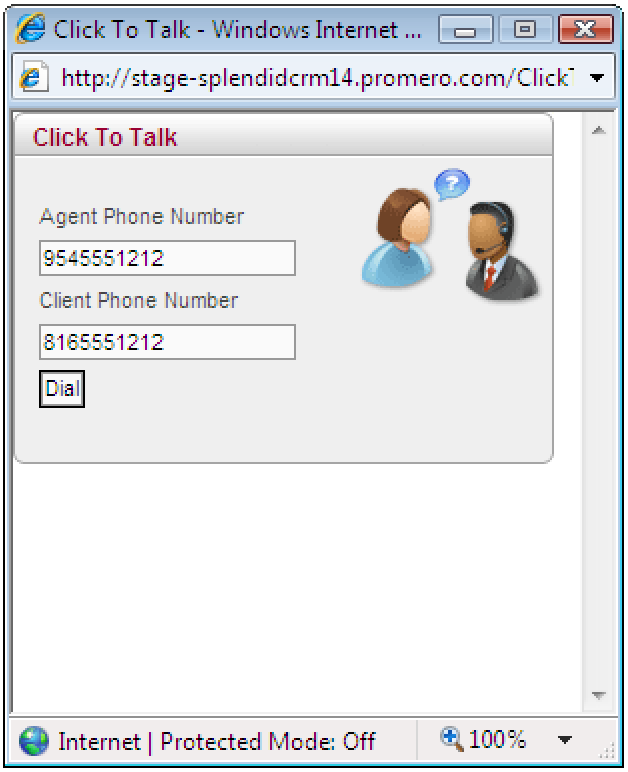
1. Log in as an Administrator
2. Click on Admin
3. Select "System Settings"



4. Select "Default Max Tabs"
5. Modify the number to how many Tab you wish to display e.g. 10
6. Click Save

Click-to-Talk Preview Dialer

In this version of ProStar CRM, Promero has applied the foundation which will enable a Click-to-talk Preview Dialer. This feature is planned to be available on-line starting November 1, 2007. It allows users to represent phone numbers as hyperlink. Once the hyperlink is selected a function will be enabled that can dial the phone number automatically.



Click-to-talk works well with Work Lists (see page 22) by organizing lists of records to contact into easy to use queues for effective communications and record updates.

This features has an additional fees, please contact your sales manager for details.

Products and Quotes (Admin Panel)

In the Administration section, use this sub-panel to manage the product catalog, and related information on manufacturers and shipping providers.

Product Types

The Product Types option enables you to classify records in the product catalog. Products are classified into product types; for example, Hardware and Software.

Product Categories

Each product type can be organized into Categories. For example, Type= Software, Categories = Word Processor, Browsers. You can create categories within a category using the Parent Category feature.

Manufacturers

Manufacturers enables you to maintain a list of product manufacturers and specify the order in which they are presented for selection in the Quotes module.

Shipping Providers

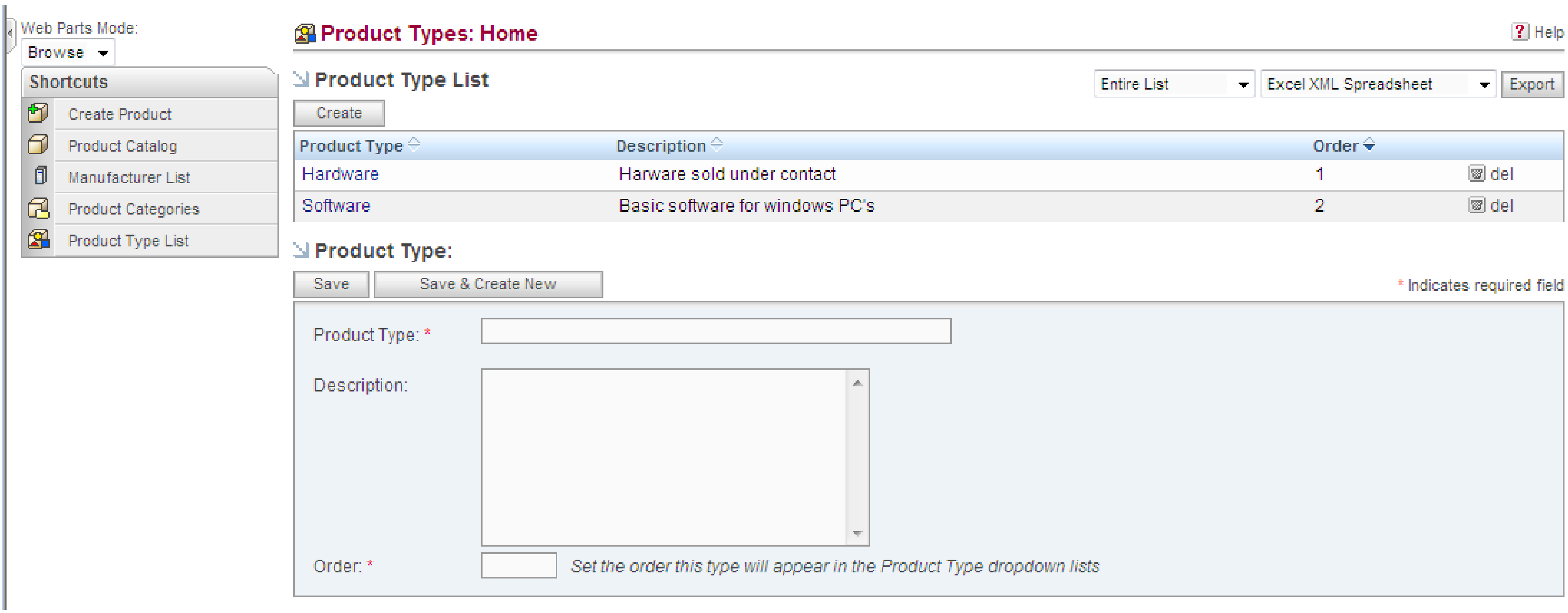
The Shipping Provider option enables you to maintain a list of shipping providers for selection in the Quotes module.

Tax Rates

The Tax Rates option lets you maintain a list of national and international tax rates. Tax Rates are available for selection in the Quotes module.

To create a product type

1. On the Product Catalog Home page, click **Product Types**, and then click **Create**. Alternatively, on the Administration Home page, click **Product Types** in the Products and Quotes sub-panel, and then click **Product Type List** in the Shortcuts menu. The Product Types Home page displays fields to create a new type.



2. Enter information for the following fields:

> **Product Type**. Enter a name for the new product type.
> **Description**. Enter a brief description for the product type.
> **Order**. Enter a number to specify the order in which the product type will appear in the drop-down list.

3. To create the type, click **Save**.
4. To create another product type, click **Save & Create New**.

To manage product types

1. To view the details of a product type, click its name in the Product Type List. At the bottom of the page, the Product Type subpanel displays the details.
2. To edit the details, revise the information in the Product Type fields and click **Save**. The revised product type is displayed at the end of the list.
3. To delete a product type, click the **del** icon corresponding to the name in the Product Type List; click **OK** to confirm the deletion.
4. To import product type data, in the Shortcuts menu, click **Import Product Types**

To create a product category

1. On the Administration Home page, click the **Product Categories** option in the Product and Quotes sub-panel.
2. In the Product Categories Home page, click **Create**. At the bottom of the page, the Product Category sub-panel displays fields to create a new category.
3. Enter information for the following fields:

> **Product Category**. Enter a name for the category.
> **Parent Category**. If the product category is a sub-set of another category, click
> **Select** to choose the parent from the Product Categories list; click **Clear** to remove your selection.
> **Description**. Enter a brief description of the category.
> **Order**. Enter a number to specify the order in which this category will appear in the Product Category drop-down list.

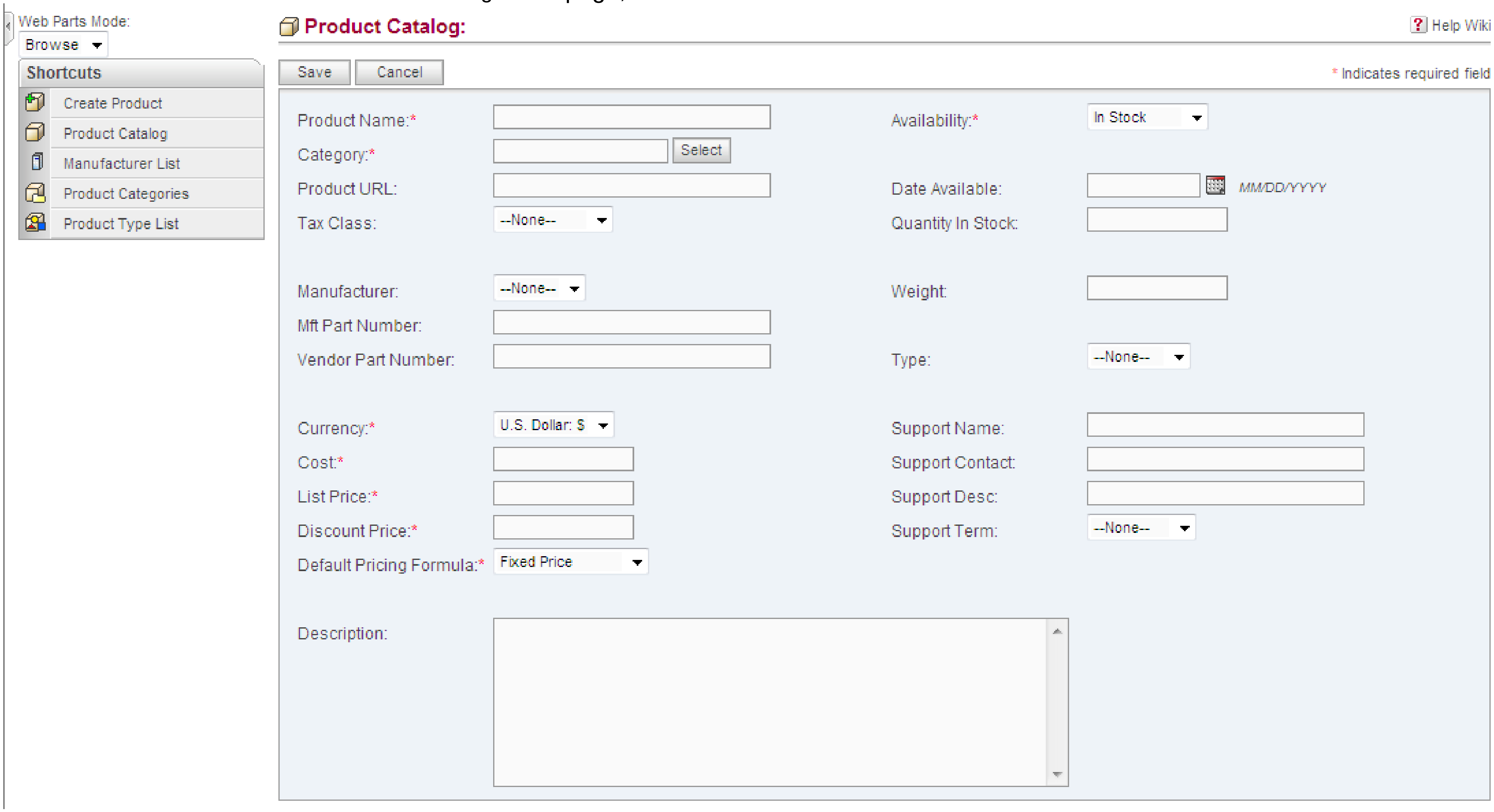
4. To create the category, click **Save**.
5. To create another category, click **Save** and **Create New**.

To manage product categories

1. To view the details of a category, click its name in the Product Category List. At the bottom of the page, the Product Category sub-panel displays the details.
2. To edit the details, revise the information in the Product Category fields and click **Save**.
3. To delete a product category, click the **del** icon corresponding to the name in the Product Categories List; click **OK** to confirm the deletion.
4. To import product category data, in the Shortcuts menu, click **Import Product Categories**

To add a product to the catalog

1. On the Administration Home page, click the **Product Catalog** option in the Product and Quotes sub-panel.
2. In the Shortcuts menu of the Product Catalog Home page, click **Create Product**



3. On the Product Catalog page, enter information for the following fields:

Product Name. Enter the name of the item.
Category. Click Select to choose the category to which the new item belongs
Product URL. Enter the URL to where the product information is located.
Tax Class. From the drop-down list, select the appropriate option to specify whether the item is taxable or not.
Manufacturer. From the drop-down list, select the manufacturer of the item.
Mft. Part Number. Enter the manufacturer's part number for the item.
Vendor Part Number. Enter the retailer's part number for the item.
Currency. From the drop-down list, select the currency in which the price is quoted.
Cost. Enter the cost price of the item. This price will not appear in quotes.
List Price. Enter the list price of the item.
Discount Price. This is the minimum price of the item. The system calculates this price based on the percentage that you specify in the Default Pricing Formula field, described below.
Default Pricing Formula. From the drop-down list, select a formula to arrive at the discount price. Depending on the formula, the system takes the cost price into consideration to calculate the discount price. If you select Profit Margin, enter the points in the adjoining field; if you select Markup over Cost or Discount from List, enter the percentage in the adjoining field.
Availability. From the drop-down list, select whether the item is in stock or not.
Date Available. If the item is out of stock, click the Calendar icon and select the date when it will be available.
Quantity in Stock. Enter the number of units that are in stock.
Weight. Enter the item weight.
Type. From the drop-down list, select from product type to which the item belongs.
Support Name. Enter the name of the Customer Support person.
Support Contact. Enter the person's contact information, such as phone number.
Support Desc. Enter a brief description for the type of support provided to customers.
Support Term. From the drop-down list, select the length of the support period.
Description. Enter a description of the product.

4. Click **Save** to add the product to the catalog; click **Cancel** to exit the page without creating the product.

To create a manufacturer

1. On the Admin Home page, click **Manufacturers** in the Products and Quotes subpanel. Alternatively, click **Manufacturers** in the Shortcuts menu of the Product Catalog, Product Categories, or Product Types home page.
2. On the Manufacturers Home page, click **Create**. At the bottom of the page, the Manufacturer sub-panel displays.
3. Enter information for the following fields:

    Manufacturer. Enter the manufacturer's name.
    Status. From the drop-down list, select **Active** to add the name to the Manufacturers drop-down list.
    Order. Enter a number to specify the order in which the name displays in the drop-down list.

4. To create the manufacturer, click **Save**.
5. To create another manufacturer, click **Save** and **Create New**.

To manage manufacturers

1. To view the details of a manufacturer, click the name in the Manufacturer List. At the bottom of the page, the Manufacturer sub-panel displays the details.
2. To edit the details, click **Edit**, revise the information, and click **Save**.
3. To delete a manufacturer from the list, click the **del** icon corresponding to the name in the Manufacturer List; click **OK** to confirm the deletion.

To create a shipping provider

1. On the Admin Home page, click **Shipping Providers** in the Products and Quotes sub-panel.
2. On the Shipping Provider Home page, click **Create**.
3. In the Shipping Provider sub-panel that displays below the list, enter information for the following fields:

    Shipping Provider. Enter the name of the provider.
    Status. From the drop-down list, select Active to display the name in the Shipping Provider drop-down list.
    Order. Enter a number to specify the order in which the name is displayed in the drop-down list.

4. To create the provider, click **Save**.
5. To create another provider, click **Save and Create New**.

To manage shipping providers

1. To view the details of a provider, click the name in the Shipping Provider List. At the bottom of the page, the Shipping Provider sub-panel displays the details.
2. To edit the details, revise the information, and click **Save**.
3. To delete a provider from the list, click the **del** icon corresponding to the name in the Shipping Provider List; click **OK** to confirm the deletion.

To create tax rates

1. On the Administration Home page, click **Tax Rates** in the Products and Quotes sub-panel.
2. On the Tax Rate page, click **Create**.
3. In the Tax Rate sub-panel that displays below the list, enter information for the following fields:

Tax Rate Name. Enter a name for the tax rate.
Percentage. Enter the tax percentage.
Status. From the drop-down list, select **Active** to display the name in the Tax Rate drop-down list.
Order. Enter a number to specify the order in which the tax rate is displayed in the drop-down list.

4. To create the tax rate, click **Save**.
5. To create another rate, click **Save and Create New**.

To manage tax rates

1. To view the details of a tax rate, click the name in the Tax Rate list. At the bottom of the page, the Tax Rate sub-panel displays the details.
2. To edit the details, revise the information, and click **Save**.
3. To delete a tax rate from the list, click the **del** icon corresponding to the name in the **Tax Rate** list; click **OK** to confirm the deletion.

Ensure that the Administrator has updated the Products as described in the above section. If this is not done you may add quotes but the pricing and shipping data will not pre-fill.

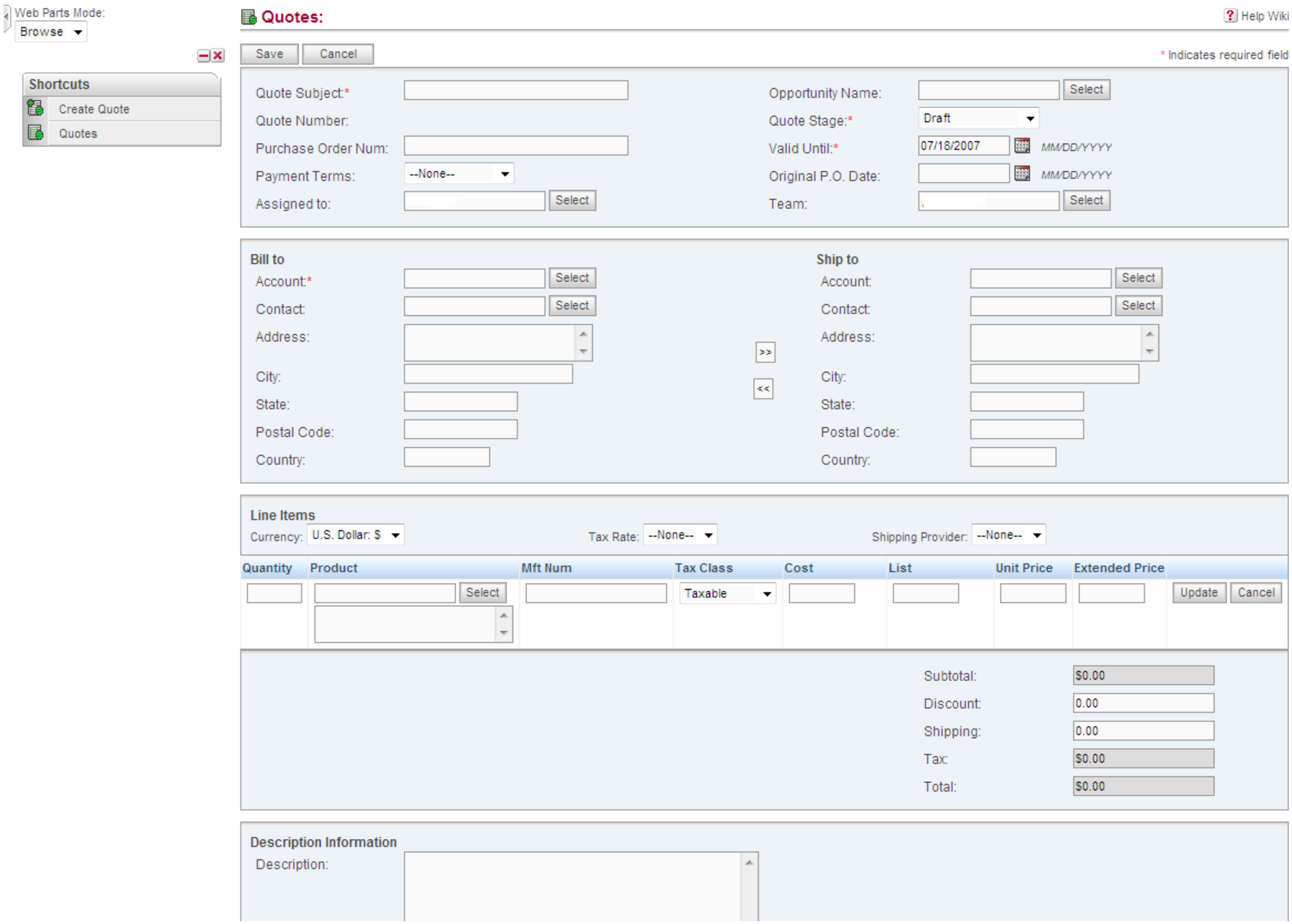
Quotes Module

Use the Quotes module to view and manage quotes for your organization. Quotes specify the quantity and the price per unit for goods and services that you offer a customer.

When you create a quote, you can select a product from the product catalog. When you select from the catalog, the system automatically fills in information such as the manufacturer's number and tax class. You can also list individual line records in a quote. To do this, you will need to first add one or more product groups and group line records under the appropriate product group.

To create a quote

1. In the Shortcuts menu, click **Create Quote**.
2. Alternatively you can use the Create Quote quick form displayed below Shortcuts. This form contains only the required fields. You can enter information for optional fields after you save the form.


Web Parts Mode:
Browse
Shortcuts
Create Quote
Quotes
Quotes:
Help Wiki
Save
Cancel
* Indicates required field
Quote Subject:*
Quote Number:
Purchase Order Num:
Payment Terms:
--None--
Assigned to:
Select
Opportunity Name:
Select
Quote Stage:*
Draft
Valid Until:*
07/18/2007
MM/DD/YYYY
Original P.O. Date:
MM/DD/YYYY
Team:
Select
Bill to
Account:*
Select
Contact:
Select
Address:
City:
State:
Postal Code:
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<<
Ship to
Account:
Select
Contact:
Select
Address:
City:
State:
Postal Code:
Country:
Line Items
Currency:
U.S. Dollar: $
Tax Rate:
--None--
Shipping Provider:
--None--
Quantity
Product
Mft Num
Tax Class
Cost
List
Unit Price
Extended Price
Select
Taxable
Update
Cancel
Subtotal:
$0.00
Discount:
0.00
Shipping:
0.00
Tax:
$0.00
Total:
$0.00
Description Information
Description:

3. On the Quotes page, enter information for the following fields.

Quote Subject. Enter information on the product or service for which you are creating the quote.
Quote Number. The system generates a reference number after you save the quote.
Purchase Order Num. Enter the PO number.
Payment Terms. From the drop-down list, select the time period within which the customer must pay for the product or service purchased.
Team. Enter the name of the team that is allowed to view the opportunity. To choose an existing team, click **Select**, and choose the team from the Team list.
Assigned to. Enter the name of the individual who is responsible working on the opportunity. To choose an existing user, click **Select**, and choose the
person from the User List. By default, this is assigned to you.
Opportunity Name. From the drop-down list, select the opportunity that resulted in this quote.
Quote Stage. From the drop-down list, select the current stage of the quote's lifecycle, such as Draft or Confirmed.
Valid Until. Click the Calendar icon and select the date until which the quote is valid. The quote expires after the selected date has passed.
Original P.O. Date. Click the Calendar icon and select the date of the original Purchase Order.
Bill to and Ship to If the Bill to and Ship to address are the same, use the >> button to duplicate the information from one section to the other.
Account. Enter the name of the account related to the quote. To choose from the list of existing accounts, click **Select**.
Contact. Enter the name of the contact related to the account. To choose from the list of existing contacts, click **Select**.
Address. When you select an account, the system automatically populates the corresponding address information. You can modify the address if necessary.
City. The name of the city where the address is located.
State. The two digit code for the State where the city is located.
Postal Code. The zip code for the address.
Country. The name of the country where the State is located. Line items
Currency. From the drop-down list, select the currency used in the quote.
Tax Rate. From the drop-down list, select the appropriate tax rate for the State.
Shipping Provider. From the drop-down list, select a shipping provider. **Note:** The administrator specifies the currency, tax rate, and shipping provider information that display in the drop-down lists.

To enter an item the quote enter

Quantity. Enter the total quantity for this product.
Product. Enter the product name; to select from the product catalog, click **Select**, and in the product catalog, click the item. The system adds it as a line item in the quote.
Mft Num. Enter the manufacturer's number, if any. If you selected an item from the catalog, the system automatically enters the appropriate number in this field.
Tax Class. Specify either Taxable or Non-Taxable. If you selected an item from the catalog, the system automatically enters the appropriate information in this field.
Cost. Enter the actual cost of the item. If you selected an item from the catalog, the system automatically enters the appropriate number in this field.
List. Enter the list price for the product. If you selected an item from the catalog the system automatically enters the appropriate number in this field.
Unit Price. Enter the price that is being offered to the customer. This may be lower than the list price.

To add a row to the quote enter click Update

4. Click **Save** to create the new quote; click **Cancel** to return to the Quotes home to return to the Quotes home page without creating the new quote.

Orders Module

Sales Orders are a common intermediate step between a Quote and an Invoice. While not all businesses use them, and proceed directly from a Quote to an Invoice, many businesses do use them – and typically operate an 'Order Desk' that is in charge of them. Sales Orders are often used in businesses that regularly part-ship orders, and need to track and confirm that each order processed is shipped in its entirety.

Sales Orders are created in a manner very similar to quotes, by defining a quantity for each of a number of products (or assemblies, which are complex products defined from a set of component products), and an account that is buying them. Sales Orders may also be created by converting a Quote into a Sales Order. The Sales Orders module manages and tracks Sales Orders through their life-cycle. Each Sales Order has terms defined for it – selected from a standard set of terms (COD, Due On Receipt, Net 7 Days, Net 15 Days, Net 30 Days, Net 45 Days, Net 60 Days). Each Sales Order has a contact, an account, and an address – for both bill to and ship to. For each Sales Order the shipping provider, and the currency must also be selected.

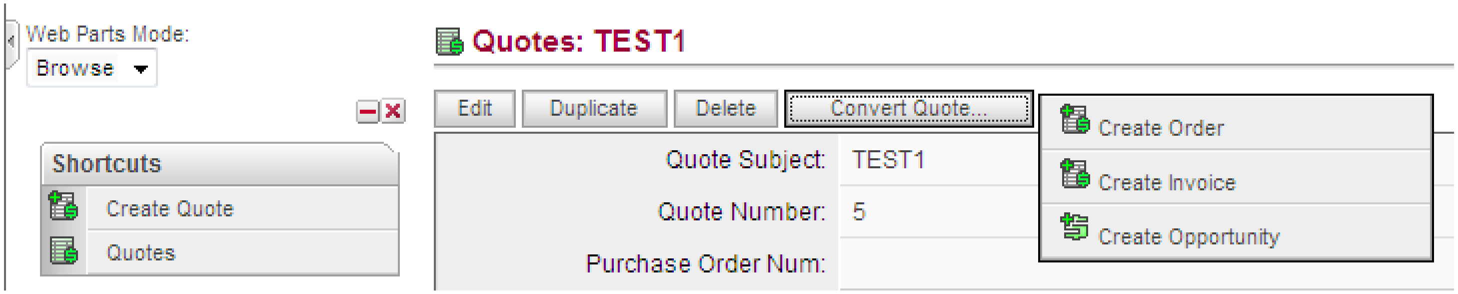
Each Sales Order has a stage - which may be set to Ordered, In Manufacturing, Partially Shipped & Invoiced, and Closed – Shipped & Invoiced. Each Sales Order consists of one or more product in it. For each, the applicable tax rate (or rates) for taxable items may be selected. One or more Discounts may also be selected from those defined in Admin, and as well a shipping charge may be specified for the Sales Order.

Converting a Quote to an Order

Quotes can be converted to an Order. To do this:

1. In the Shortcuts menu, click **Quotes** to display a list of Quotes. Alternatively you may Click on the Quotes module Tab and select from the list or search for the Quote to update.
2. Click on the Quote you wish to update, this will display the Quote detail screen. On the top of the screen you will see a button labeled **Convert Quote**

3. Click on the **Convert Quote** button, this will show the 3 option for conversion



4. Click on the **Create Order** button, this will display the Edit Order screen
5. Fill in the Order Shipped date
6. Update any other data such as **quantity** and **description**
7. Click **Save** to create the new Order; click **Cancel** to return to the Quotes detailed screen without creating the Order

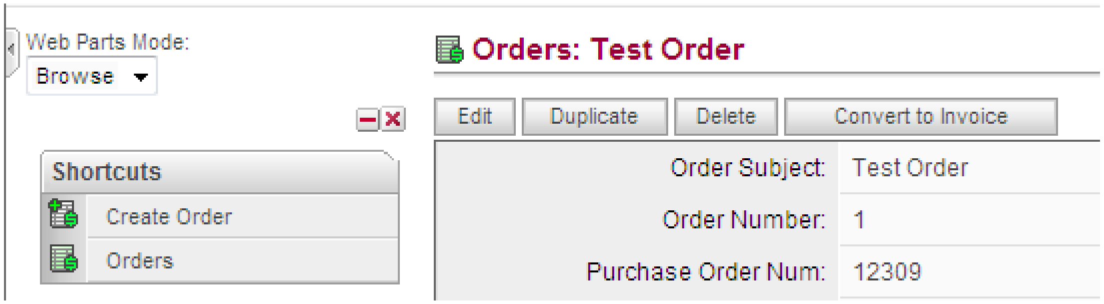
Invoices Module

The Invoices module manages the preparation of customer invoices. Invoices are created in a manner very similar to quotes, by defining a quantity for each of a number of products (or assemblies, which are complex products defined from a set of component products), and an account to which they are being invoiced. Invoices may be managed and tracked through their life-cycle using the Invoices module. Each invoice has terms defined for it – selected from a standard set of terms (COD, Due On Receipt, Net 7 Days, Net 15 Days, Net 30 Days, Net 45 Days, Net 60 Days). Those terms, combined with the invoice date, define what the due date is for the invoice. Each invoice has a contact, an account, and an address – for both bill to and ship to. For each invoice the shipping provider, and the currency must also be selected.

Each invoice consists of one or more products. For each, one or more Discounts may be selected from those defined in Admin, and as well a shipping charge may be specified at the group level of the invoice. Taxes applicable to the items will be listed, based on the tax codes of each item.

To convert an Order to an Invoice

1. In the Shortcuts menu, click **Orders** to display a list of Quotes. Alternatively you may Click on the Orders module Tab and select from the list or search for the Orders to update.
2. Click on the Order you wish to update, this will display the Order detail screen. On the top of the screen you will see a button labeled **Convert to Invoice**



3. Click on the **Convert to Invoice** button, this will show the edit Invoice screen.
4. Update any data such as **quantity** and **status**
5. Click **Save** to create the new Order; click **Cancel** to return to the Orders detailed screen without creating the Invoice

Work Lists

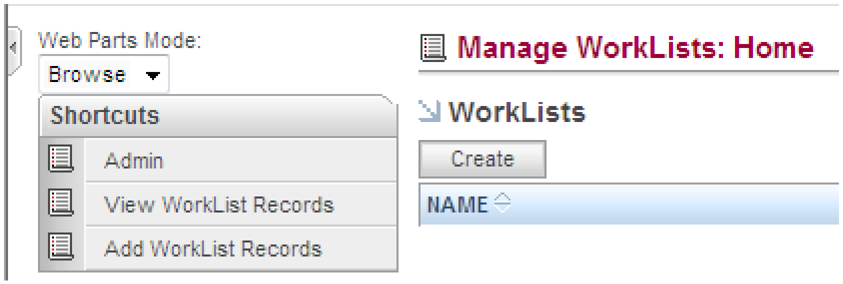
Use the Work Lists module to view groups of **records** that have been assigned to a **Team** for work. Managers can create these groups of records, called **Work Lists.** These **Work Lists** may consist of Accounts, Contacts or Opportunities.

A **Work List** manages a queue cycle. A queue cycle is similar to a single file line. Each record is worked one-at-a-time and when completed, the next record in line is displayed. This helps users methodically complete their work assignments and not lose track of which records have been completed and which records still need more follow up work. For example if the user could not speak with the contact, they may need to call them back later and so the record will remain in the **Work List.**

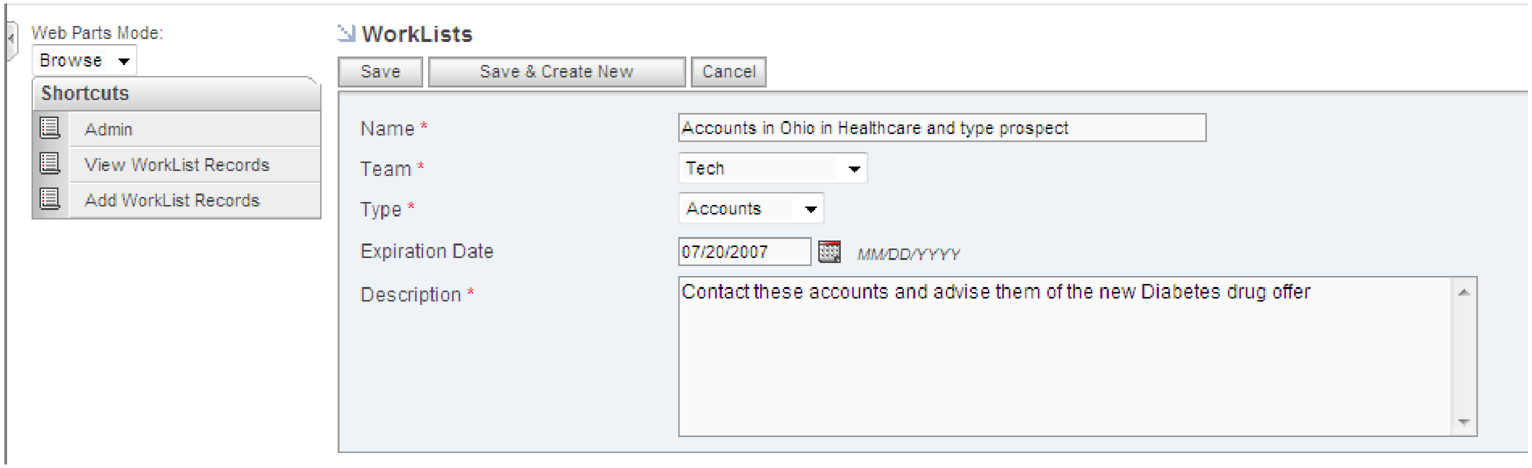
Managers can use standard search criteria when they create a **Work List** they may also add additional records to a **Work List** by doing more than 1 search and adding records to a **Work List** based on multiple searches. This helps managers to assign a **Work List** based on whatever criteria is most useful to them such as a sales blitz to a specific area or based on specific record data.

To create a Work List

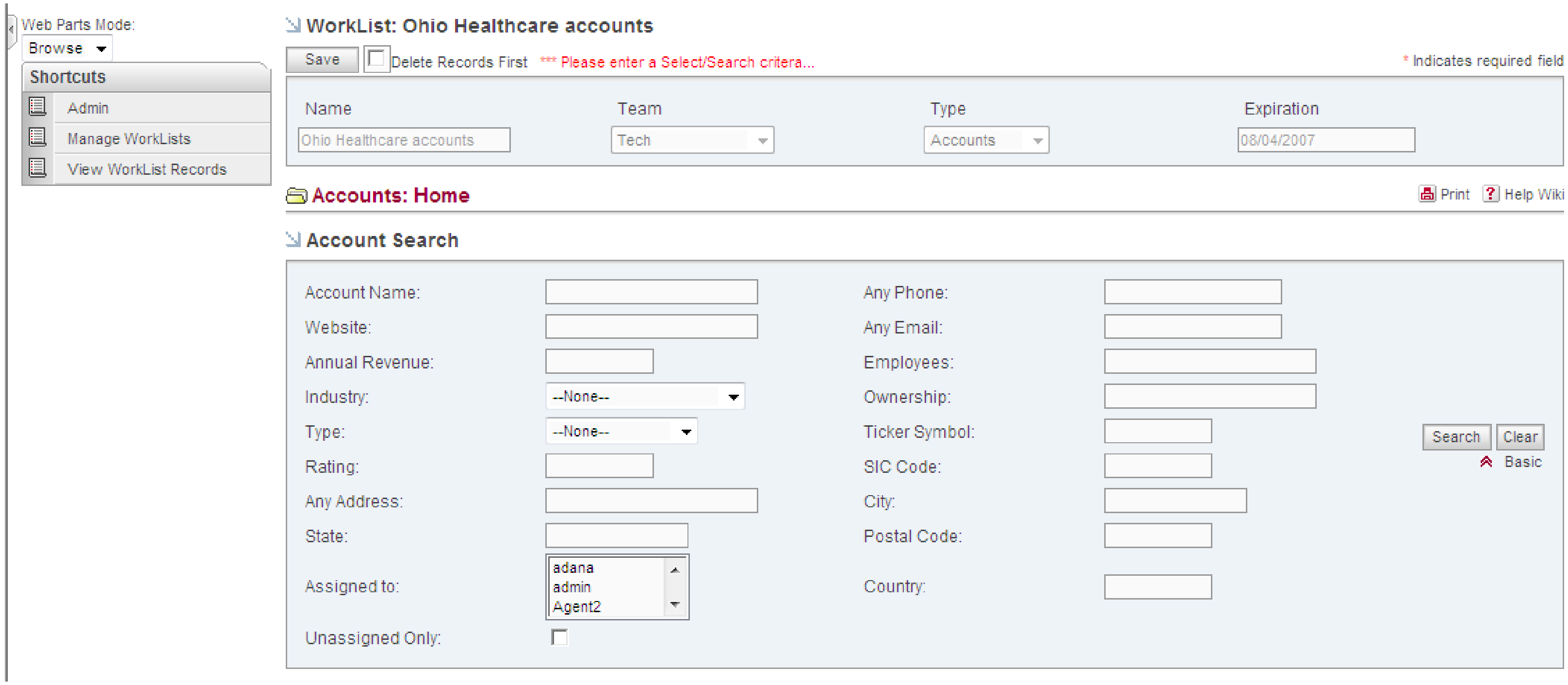
1. Click **Admin**
2. Scroll to the bottom of the Administration Home page then click **Manage Work Lists** from the Work List subpanel



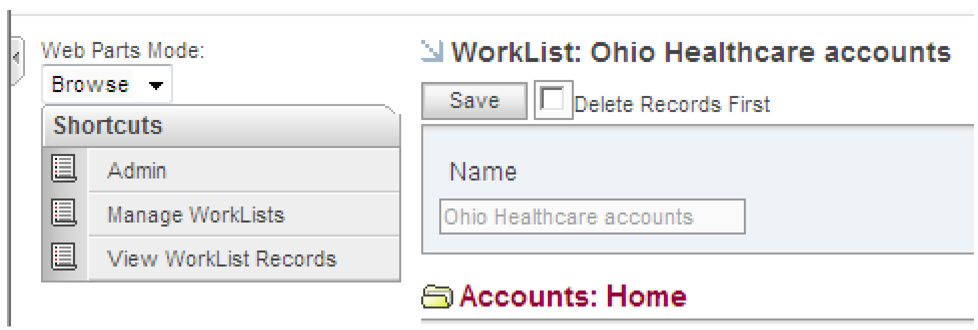
3. Click **Create,** fill in the following fields:
   Name. Enter the Name of your Worklist
   Team. Select the Team to assign the Work List to
   Type. Select the Type of records you wish to add to your Work List
   Expiration Date. Select the date that the list will expire. This is used to ensure that criteria used to make the list is not so old that it no longer applies.
   Description. Fill in any helpful text here that the users will see when they display the Work List Ex. Please contact these clients and update their email details



4. Click **Save,** this will save the **Work List** return to the grid view
5. Click Add Work List records, this will redisplay the grid of **Work Lists** for you to select
6. Select the Work List that you wish to add records to. This will display the search page along with a heading which shows the **Work List** name, Team, Type and expiration date. In most cases it is best to select the Advanced option. This will open up the Advanced search options which provide a greater level of detail for creating your list of records that will be added to this **Work List**



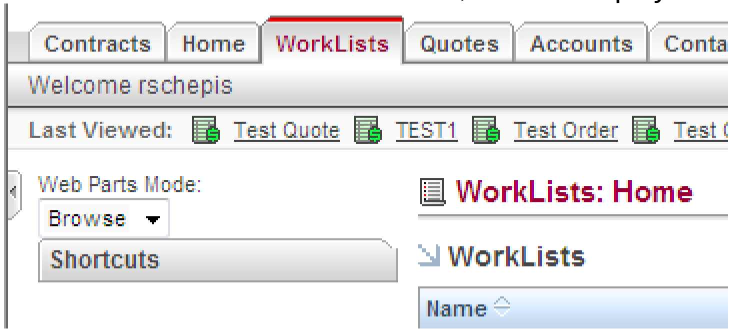
7. Make your search criteria, then click **Search,** matching records will be displayed.
8. Scroll to the bottom and click **Check All** or if you wish, only check off the records you wish to add
9. Scroll to the Top and click **Save,** if you wish to first remove old records check off the Delete Records First check box



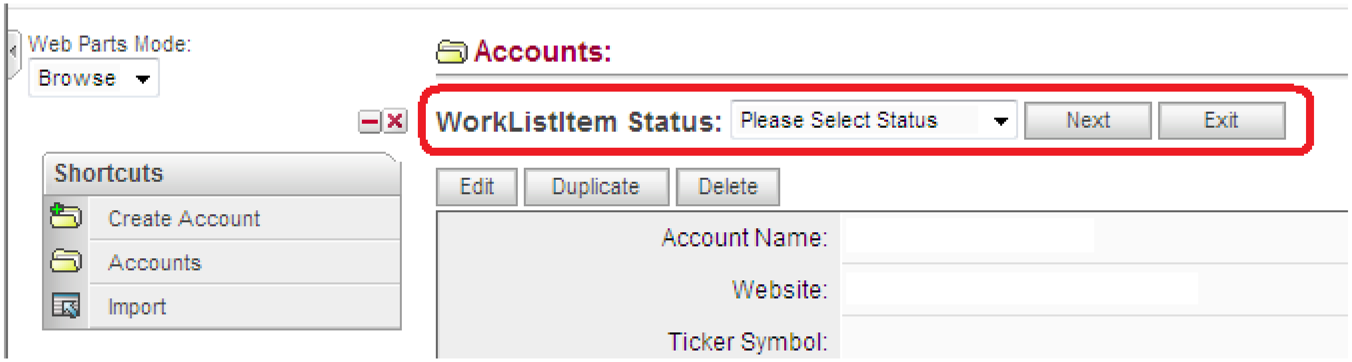
10. The Search screen will redisplay, you may now continue to perform additional searches and add records in the same fashion.
11. Once you have completed adding records click **Manage Work lists,** the grid view of Work Lists will display
12. Select the Work List you have created. The Work List detailed view will display and provide a summary of the Work List status.

To process a Work List

1. Click on the **Work List** module Tab, this will display a list of the **Work Lists** assigned to a **Team** that you are a member of.



2. Click on the **Work List** you wish to begin working on. This will display the top record in the Work List (queue)



There are three controls that will appear at the top of the display

Status drop down - use this to set the status of the record. Your administrator will designate which statuses apply to this particular **Work list.**
Next - This will move to the next record in the **Work List** (queue) you will first need to set the status of the record before moving to the next record.
Exit - This will end the **Work List** (queue) cycle and a bookmark will automatically be set so that upon your return, the same record will be re-displayed

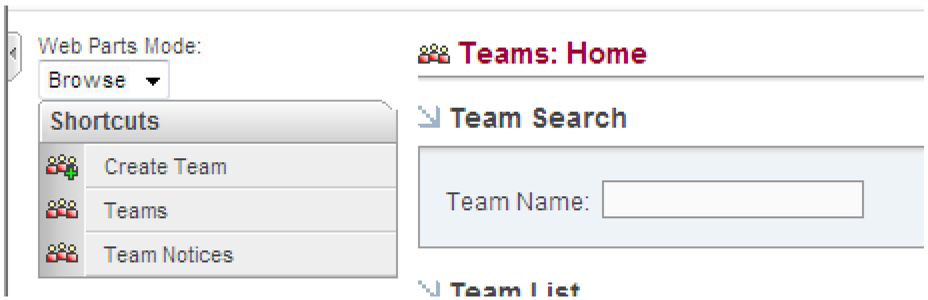
3. You may navigate and update anything in the CRM while working in a Work List, when you are ready to return simple click back on the **Work List** module Tab, the bookmark will automatically re-display the correct record in the **Work List** (queue).

Team Notices

Team Notices will display any announcements targeted towards the team that users belong to. Only users with administrator privileges can set up these announcements.

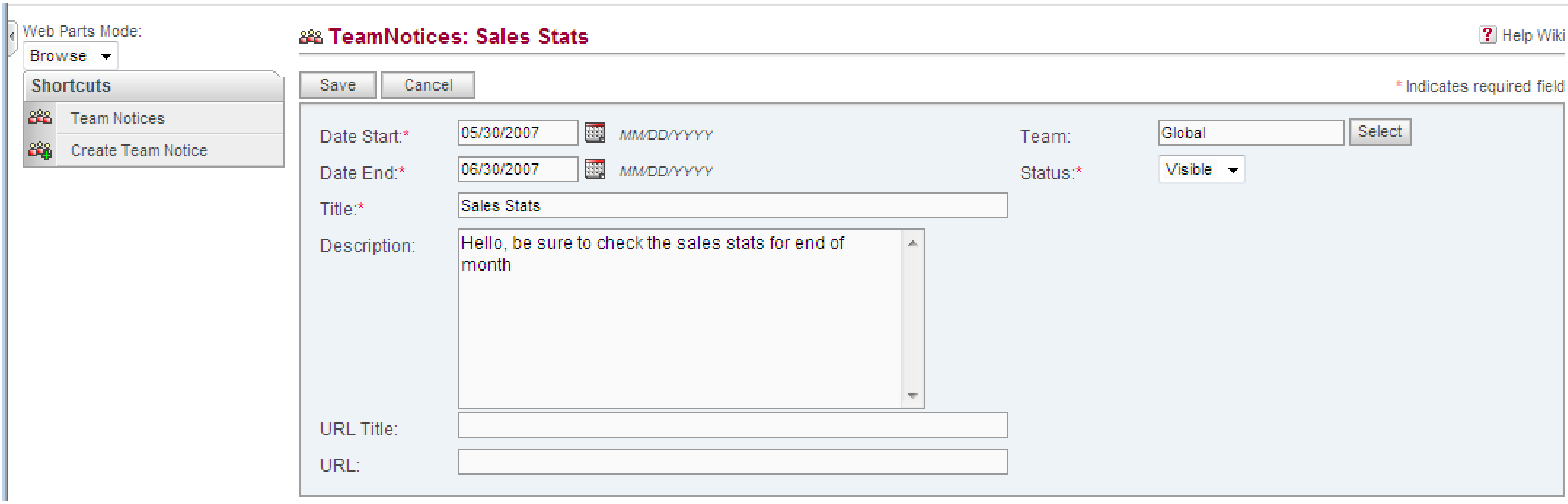
To set up a Team Notice

1. On the Administration Home page, click the **Team Management** option in the Users sub-panel.
2. Select Team Notices



3. Click Create Notices, then fill in the following fields

Date Start. The date to begin to show the Team Notice
Date End. The date to end the Team Notice
Title. Enter title to display above your message
Description. Enter the text of your message
Team. Select the Team to which you will display the message
Status. Select Visible
URL Title. Optionally, if you wish to have a URL type in its title
URL Title. Optionally, if you wish to have a URL type in its address



4. Click **Save** to finish the Team Notice or click **Cancel** to return back to the Teams grid view