MYOB EXO Business

CRM

Momentum Software Solutions
Customer Support

As a valued customer of Momentum, we provide support for all MYOB EXO Business and Employer Services modules.

You can lodge a Support Request.

Via email:-

support@momentumss.com.au

Via our website:-

http://www.momentumsoftwaresolutions.com.au/support

Or contact our Help Desk:-

07 5479 1877

There is easy access to information on hardware, network and operating system requirements for efficient operation of MYOB EXO Business software. You can download minimum hardware and network requirements from our website at:-

http://www.momentumsoftwaresolutions.com.au/products

This training manual has been developed by the MYOB Enterprise Division - Professional Services Team for use in the delivery of training.

This manual uses a simple step-by-step approach to give you the skills and knowledge necessary to manage customer relationships using your EXO CRM system.

This manual has been designed for the following MYOB product:

- EXO CRM

MYEBCRM

Managing customer relationships using EXO CRM

EXO CRM

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Edition: **8.5**

Participants

This course is aimed at:

- Users of EXO CRM.

Prerequisites

Basic PC experience is required.

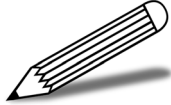Understanding of the opportunity and sales processes.

Instructional method

The instructional method combines trainer-led demonstrations with hands-on student practice. You will work through a series of examples. Each unit concludes with a Review Task.

Conventions used in this manual

- Objects such as buttons or icons that you must click or select are shown in **bold**.
- Information to be entered (typed in) is shown in ***bold and italics***.
- Keyboard keys are shown as TAB , CTRL , etc.

Screenshots in this manual are for illustration purposes only and may differ from those in the actual product due to configuration settings.

Symbols used in this manuals

Symbol	Name	This symbol tells you...
	Practice task **Review task**	… to complete a task to practice the skills you have just learnt, or as a review task at the end of the unit to consolidate what you have learnt.
	Written Review task	… to complete written questions to review the content covered in the unit.
	Optional Challenge	… to complete this task if you have finished early and are looking for an extra challenge.
	Tip	… about helpful tips
	Note	… to take note of an important message.
	Warning	… about potential problems to be aware of.
	Important	… to pay attention to an important notice.
	New	… where features are new for EXO CRM.
	Reference	… where to go to find more information.
	Skills Checklist	… to tick off a list of skills that you have learnt during the unit.

Objectives

Upon completion of this course you will be able to:

- Navigate MYOB EXO CRM

- Create Companies

- Create and maintain Contacts

- Create pre-defined dropdown lists used in Activities, Companies, Contacts and Opportunites

- Create Sales Budgets

- Create Activities

- Create Opportunities

- Create Campaigns
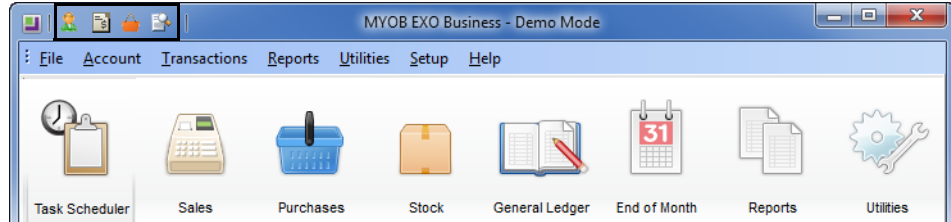
Navigational & Function Keys

MYOB EXO Business can be navigated by keyboard or mouse, however a combination of both is generally used. The standard keyboard convensions for Windows are used, with a few MYOB EXO Business-specific options.

Windows Navigation Keys	
TAB	Moves from field to field, column to column
SHIFT+TAB	Moves backwards from field to field, column to column
ENTER	On open dialogue boxes, automatically select the OK button.
ARROW KEYS	Moves around a grid, or up and down a list.
PAGE UP, PAGE DOWN	Moves between the "sections" of some screens, such as moving from the invoice header to the body to the end.
ALT + (Underlined Letter)	ALT key plus the underlined letter on a field label activates that function, e.g. ALT + N within a the debtor account screen creates a New Debtor.

MYOB EXO CRM Function Keys/Shortcut Keys	
F1	HELP
F2	Activities Quick Add
F3	Company Quick Add
F4	Contacts Quick Add
F5	Opportunity Quick Add
RIGHT + CLICK	Right-click on Exogrid header or certain field to acces additional functions or options.
CRTL + N	New line narrative (within an order/invoice)

Shortcut Menus

A shortcut menu is available at the top of the main window of each EXO Business module. This menu offers quick access to commonly used functions, e.g. accessing the Debtors Masters, accessing the Stock Masters, creating a new Sales Order, etc. Any menu item that has a shortcut key assigned will automatically appear in the shorcut menu.

Shortcut Menus

Contents

Introduction

1

In this unit you will learn the basic functionality.

By the end of this unit, you will be able to:

▶ Demonstrate an understanding of the key features of EXO CRM.

Overview

EXO CRM is an add-on module that adds Customer Relationship Management functionality to the MYOB EXO Business system.

With EXO CRM, users can manage:

- Contacts
- Companies
- Prospects
- Tasks and appointments
- Opportunities

As part of the EXO Business suite, EXO CRM has access to all relevant records in the EXO Business database.

Dashboards

The EXO CRM interface makes extensive use of Dashboard widgets, allowing the interface to be tailored to each user's specific needs.

Drill-down menus

EXO CRM allows drill-down access to all relevant sections of the EXO Business core module. Details relating specifically to CRM can be edited, e.g. details of Contacts and Non Accounts, but all other details are read-only when accessed from EXO CRM. No transactions can be generated from CRM, e.g. while it is possible to generate a Sales Order quote from an Opportunity in EXO CRM, that quote must be processed as a Sales Order in the EXO Business core module.

Outlook Integration

EXO CRM also integrates with Microsoft Outlook to synchronise contacts, tasks and appointments between the two systems.

N O T E

Synchronisation with Microsoft Exchange Server is not supported.

EXO Business Core

CRM features, e.g. adding/editing Opportunities, can be added to menus in the EXO Business core module.

Example:

The Opportunites tab can be made available in the Debtors or Creditors Maintenance screen, enabling users to manage the process end-to-end from within EXO Business Core.

W A R N I N G
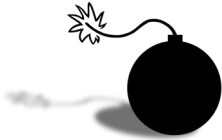
A CRM license is required to add CRM functionality to EXO Business Core. When a user logs onto EXO Business Core, and EXO business **as well as** an EXO CRM license will be used.

Quick Add Widgets

EXO CRM includes several Quick Add functions, which allow users to quickly create new records by entering the minimum required details into a simple window. The new records can then be opened and filled out at a later time. Quick Add functions are available for adding:
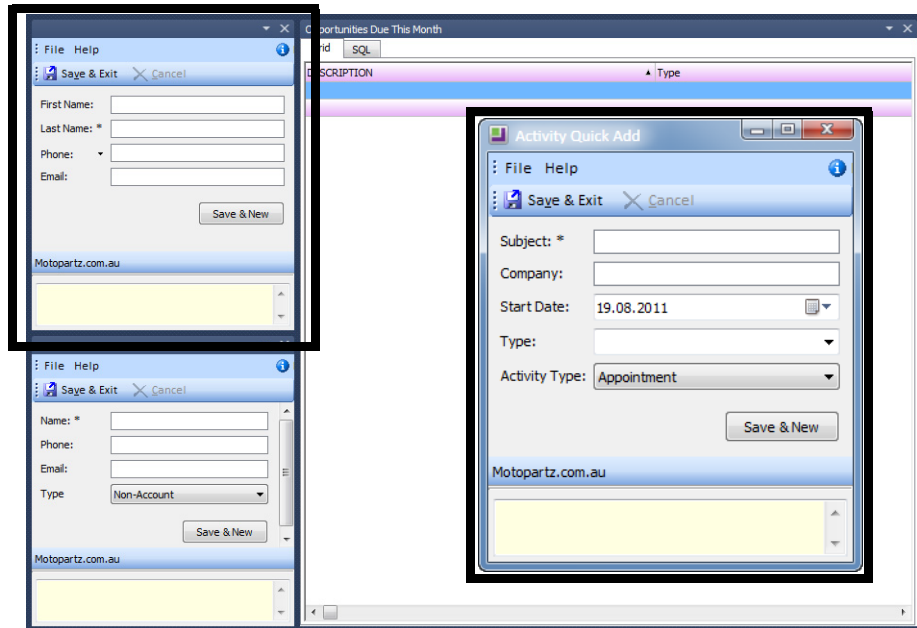
- Activities (**Accounts > Activity Quick Add** or **F2**):

- Companies (**Accounts > Company Quick Add** or **F3**):

- Contacts (**Accounts > Contact Quick Add** or **F4**):

- Opportunities (**Accounts > Opportunity Quick Add** or **F5**):

Quick Add functions are available as Dashboard widgets and as standalone windows:

Quick Adds - Widgets or Windows

T I P

Quick Add windows can be added to menus and given shortcuts so that they appear in the EXO CRM shortcut menu for easy access.

Quick Add menus stay open when Save & New is slicked, allowing multiple records to be entered in quick succession.

N O T E

Companies added using the Company Quick Add function are always Non Accounts to begin with; these can be converted to full accounts later if necessary.
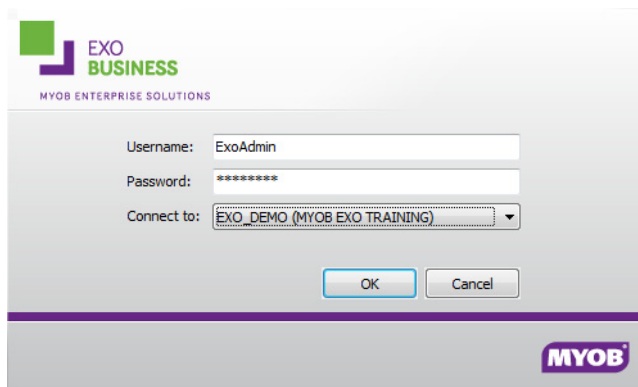
T I P

Quick Add functions are also available for use in the EXO Business core module.

Starting EXO CRM

To log in to an EXO Business database:

1   Double-click the **EXO CRM** shortcut icon on your desktop. You will be presented with the login dialog as follows:

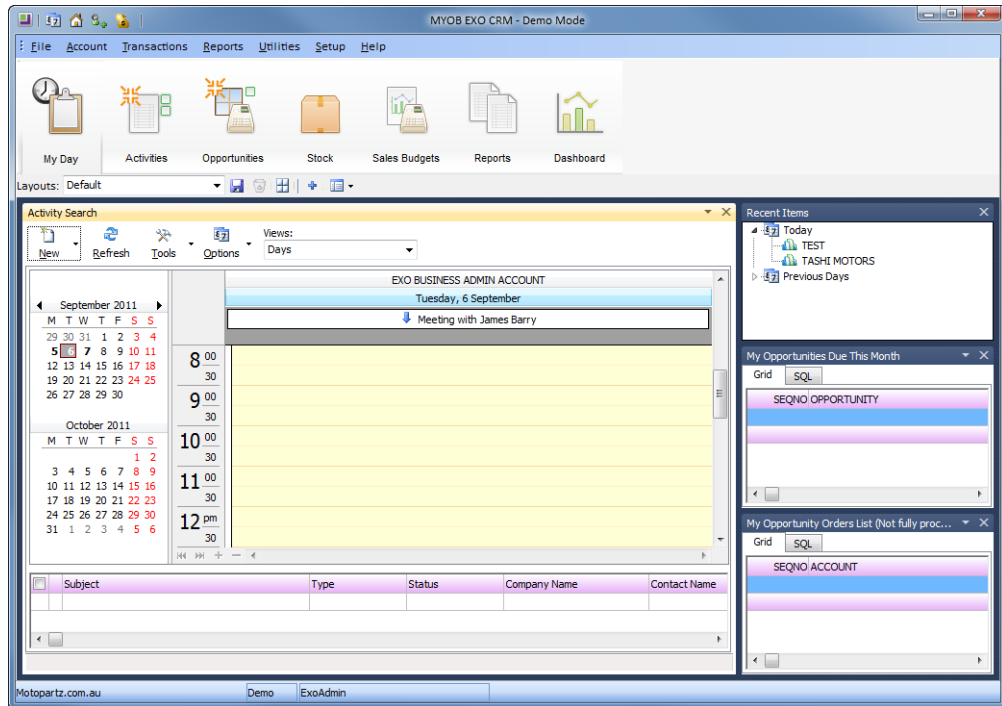*EXO Business Login screen*

2   Type in the demo password (***DEMO***).

I M P O R T A N T

!   Usernames and Passwords in EXO Business are case sensitive and must be entered exactly as set up in order to successfully log onto a database.

3   Click **OK**.

4 You should now be at the EXO CRM main screen, which defaults to the My Day workflow screen.

EXO CRM - My Day

Choosing the Correct Database

If you have only installed the demo database, you will have one database available to connect to, the EXO Business_demo (MotoPartz).

If you are working within an existing installation, there may be more than one database available to connect to. Implementing Partners may install a number of databases on your system to enable testing of various advanced functions (such as price updates, etc).

In the **Connect to:** field, make sure that the correct database is selected before logging in.

WARNING

Each time you log into EXO Business make sure that you are logging in to the correct database by selecting the correct name from the drop down list.
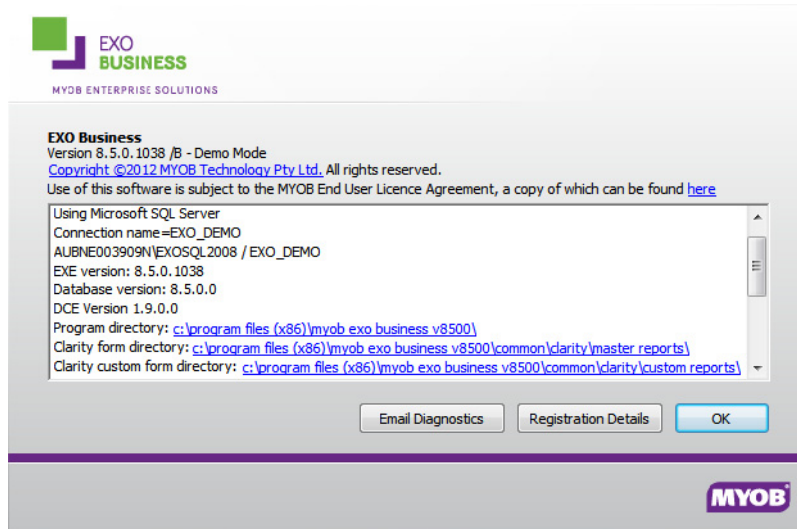
IMPORTANT

When undertaking transactions in a test database, make sure you log out as soon as the testing is complete. It is essential that you be aware of the database you are working in (hover over the company name in the status bar to check the connection string that you are using.)

TIP

You can check your current login details by choosing **About** from the **Help** menu.


EXO Business Help > About screen

Workflow Screens

By default, EXO CRM has a number of default workflow screens focussed on specific processeses. Each workflow screen can be customised to each user's profile.

Menu Icon	Description
	The My Day screen provides the user with a quick overview of their day, e.g.: • A calendar showing their appointments and tasks for the day • A list of recently accessed contacts and companies • A list of Opportunities
	The Activities screen provides a workflow widget to maintain companies and contact, as well as creating activities against those contacts and companies. This screen also includes widgets for company and contact searches.
	The Opportunities screen provides a workflow to create opportunities, add activities to those opportunites and review sales orders associated with those activities. This screen also includes widgets to search opportunities, to view opportunities by stage as well as the opportunity pipeline.
	The Stock screen provides widgets to view stock and stock levels. A widget is also available to view Opportunities that have stock on Back Order.'
	The Sales Budget screen allow team members to view their sales budgets.
	The Reports screen provides access to the Clarity Report Browser and Sales Analysis Designer.
	The Dashboards screen provides access to numerous widgets available to users in EXO CRM.
	The Campaigns screen provides a Campaign search widget, displaying the details of all campaigns currently in the system.

Exogrids

Exogrids are used throughout EXO Business to display, search and sort data. Exogrids are active on most screens where you are viewing current transactional information (debtor accounts, stock items, etc), however they are not active on the transaction entry screens (ie. new sales order).
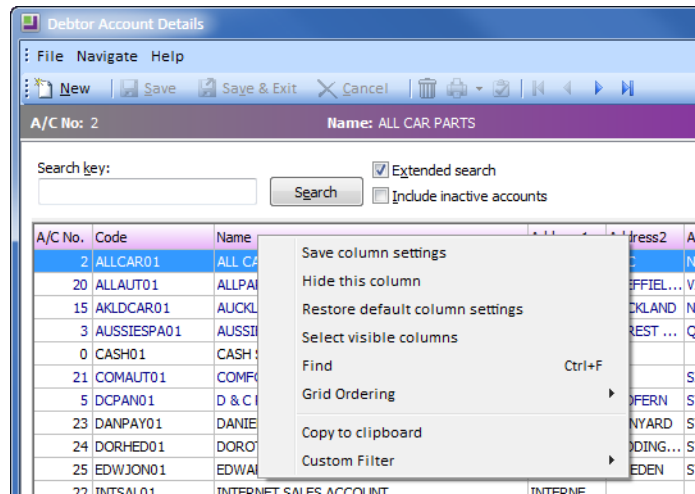
Exogrid options on the Debtor Account screen

NOTE

Custom filters and ordering of columns are unique to your workstation and will not appear when working on a different user's workstation.

To manipulating exogrids:

TIP

Hold down the SHIFT key while clicking on a second column facilitates multiple sorting (eg. sort by Primary Group, then by Name.)

Action	Description
Sort the Grid	Click on a column header name to sort by that column (in ascending order). Click on the column a second time to reverse sort. You should see a small black triangle indicating the column that you are sorting on.
Restructure the Grid	Click and drag in the column header to re-order the grid (e.g. move **NAME to** be the first column in the grid).
Open an Item	**Double-click** on the line item.
Display Line Options	Right-click on the grid body to display options related to the line selected (e.g. reverse a transaction, print a document).
Display Grid Options	Right-click on the blue header line of the grid (subject to option support) • **Save column settings** - retains the current settings for this grid on this workstation. • **Hide this column** - a quick method for hiding the column that you have selected. • **Restore default column settings** - resets all changes back to the 'factory default'. • **Select visible columns** - determines the columns to display in the grid. Some optional columns are not enabled by default, as they may not suit all users. • **Find** - prompts for search text, and searches the grid for a matching entry. • **Grid ordering** - provides two options, to 'Lock Grid Ordering' or to 'Revert to Natural Order'. This prevents automatic reordering when keying-in transactions. • **Copy to clipboard** - copies the contents of the visible columns to the Windows clipboard, to be pasted into a spreadsheet or similar application (using the **Edit** > **Paste** menu in most applications). • **Custom filter** - advanced option to apply custom SQL statements to the grid. See your implementing partner if you want this functionality activated.

N O T E

If you make changes to an Exogrid that you want to retain, choose **Save Column Settings**. This will apply to the workstation you are working at.

N O T E

Most screens use ExoGrids, however Transaction Entry screens do not use ExoGrids and therefore cannot be manipulated (ie. new sales order, purchase order or invoice.)

Saving Window Sizes and Positions

When resizing or repositioning windows, it is possible to save these settings for next time you open a particular window.

To save/restore the window size and/or position:

1 **Right-click** on the windows title bar or press **ALT+SPACEBAR**.

2 Select **Form Position > Save**. This will save the window at that size and position for next time you open it. The window can subsequently be resized as often as required and will reopen with the saved settings.

3 Select **Form Position > Restore** to restore the default MYOB EXO Finance settings.
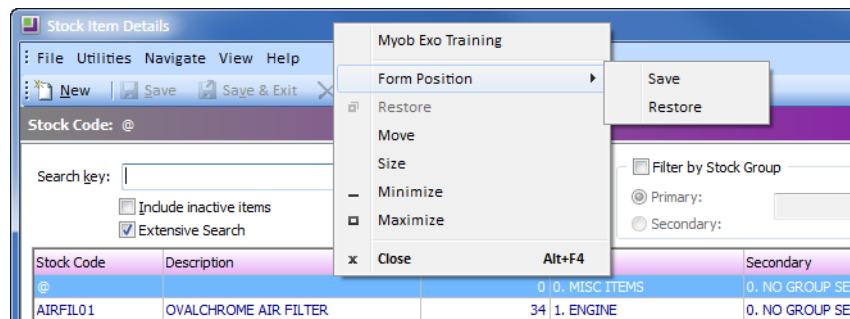
Saving window positions and sizes

Widgets

The following types of widgets are available:

- Clarity widget - widgets that display a Clarity report.

- URL widget - widgets that display the target of a URL, e.g. a web page or a local file.

- Pivot widget - widgets that display SQL data in a pivot table.

- Grid widget - widgets that display SQL data in a standard ExoGrid.

- Check List widget - widgets that display a structured list of items that can be checked off as part of a process.

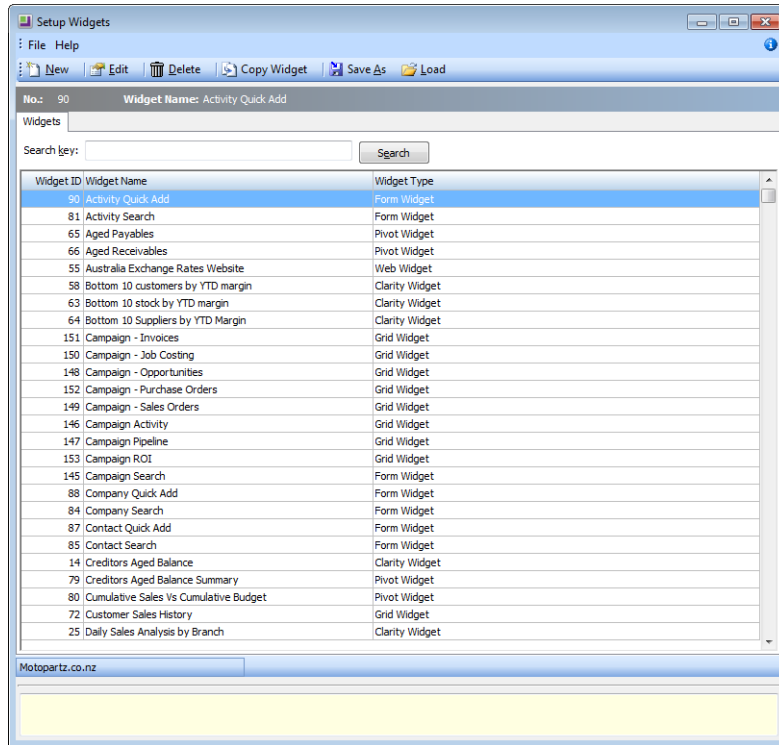- Form widget - special-purpose widgets created by MYOB, which cannot be edited or customised.

To create a new widget:

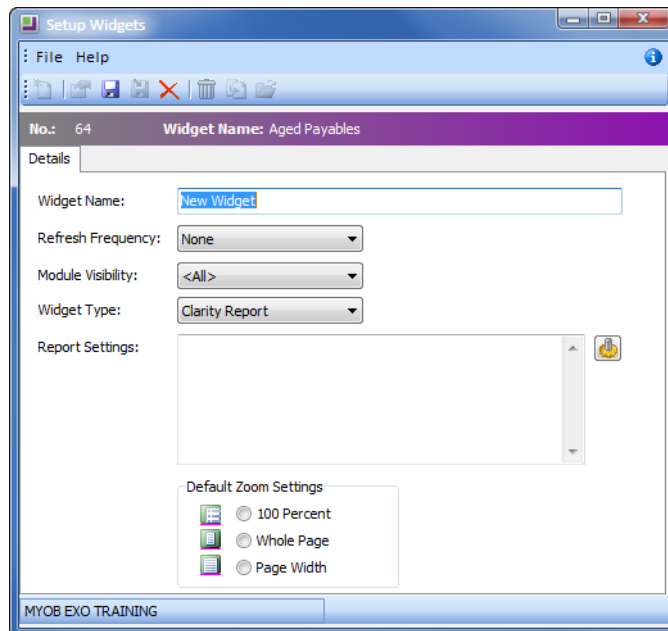**1** Select **Setup Widgets** from the **Setup** menu.

N O T E

Widgets can also be set up in EXO Business Config in the Admin > Dashboards > Setup Widgets section.

Set Up Widgets Menu

2 Click the button.

Create a new Widget

3 Enter a **name** for the widget.

4 Select the **Refresh Frequency**, which determines how often the data in the report is automatically refreshed.

5 Select the EXO Business module in which this widget should be available. Choose from:

- All
- EXO Business
- EXO Job Costing
- EXO Business Analytics
- EXO Business CRM
- EXO Accountant's Assistant

6 Select a Widget Type:

Clarity Report	Select this type to create a widget that displays a Clarity report.
URL	Select this typ to create a widget that displays the target of a URL, e.b. a web page or a local file.
Pivot Table	Select this option to create a widget that displays data in a pivot table.
Grid	Select this option to create a widget that displays data in a standard ExoGrid.
Check List	Select this option to create a configurable check list that allows you specify steps when they are not started, in progress, under review or completed
Form	This is not a selectable option. This is solely used for system widgets that are hard coded.

7 Specify what information the widget should display:

Clarity Report	Click on the 👆 button to select a report file. Once a report is selected, this button opens a window to set any necessary report parameters.
URL	Enter the URL to display into the **URL** field.
Pivot Table or Grid	Enter an SQL statement to select the data to display into the **SQL** field. You can also add in URL links to allow user to have increased click through functionality.
Check List	With this type of widget another tab called Checklist Setup will appear. This allows you configure the check list that you are going to use. This is only currently designed to be used with Accountant's Assistant.

8 For Clarity widgets, select the **Default Zoom Settings**. This determines how large the report appears inside its frame.

9 Click **Save**.

Help Functions

There are a number of ways to access help when using EXO Business.

These include:

On-line help

This can be accessed from **Help** > **On-line Manual** or by pressing **F1**. If you cannot access help, contact your implementing partner. Your help file should be installed on the help directory specified in the Exoconfig profile (usually C:\Program Files\MYOB EXO Business\Help).

The On-line help function offers a comprehensive, indexed guide to most Exonet functions which is designed to support you in your day to day use of EXO Business.

Tool Tips

Tool Tips are shown when hovering the mouse over an icon, a section, an option or a setting.

Screen help

Screen help is shown at the bottom of most screens and can be turned off and on by clicking the button on the top right side of the screen (where available).

Whitepapers

A number of whitepapers have been written for MYOB EXO Business to address various topics on the system. These offer a high level of technical and some procedural detail and can be accessed through your implementing partner.

Implementation Partner

Your implementation partner will assist you in accordance with agreements established at the start of your EXO Business implementation process.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✔
Briefly explain the main features of EXO CRM	
Create a custom widget	

Definable Lists

2

In this unit you will learn how to create predefined dropdown lists used in EXO CRM.

By the end of this unit, you will be able to:

▶ Create a list of Activity Types

▶ Create a list of Activity Statuses

▶ Create a list of Company Types

▶ Create a list of Marketing Classes

▶ Create a Contacts List

▶ Create a list of Advertising Types

▶ Create a list of Lead Sources

▶ Create a list of Opportunity Stages

▶ Create a list of Opportunity Types

▶ Create Campaign Stages

Overview

There are a number of dropdown lists in EXO CRM, some that must be predefined before certain areas can be used.

Activity Type

The Activity Type is used to classify the type of activity (appointment or task) that is being created, e.g. new business, contact call, email, etc.

Activity Status

The Activity Status is used to indicate the current status of the activity, e.g. in progress, completed, etc.

Company Type

The Company Type is used when creating a new company, e.g. non-account, prospect, etc.

Marketing Classes

Marketing Classes are used to identify contacts that receive market-specific communication, e.g. promotions, product launches, etc.

Contact Lists

Contact Lists are used to send buld communications to a group of contacts.

Advertising Types

The Advertising Types are used to indicate where the contact was sourced from, e.g. referral, advertising, billboard, etc.

Lead Source

The Lead Source is used to track the source/origin of an opportunity, e.g. printed media, referral, etc.

Opportunity Stages

The Opportunity Stages are used to track the status/progess of an opportunity, e.g. unqualified, quote, won, etc. Each Status is also alloted a probability rate to track the probability of the opportunity turning into a sale, e.g. 0%, 70%, 100%, etc.

Opportunity Type

The Opportunity Type is used to track the type of opportunity, e.g. sale, upsell, etc.

Campaign Stages

The Campaign Stages are used to filter the campaigns listed based on the progress/stage of the campaign.

T I P

Most of these dropdown lists can also be edited on the fly by selecting **Edit List...** in the dropdown list.

Activity Type

The Activity Type dropdown list is used on the Activity screen:
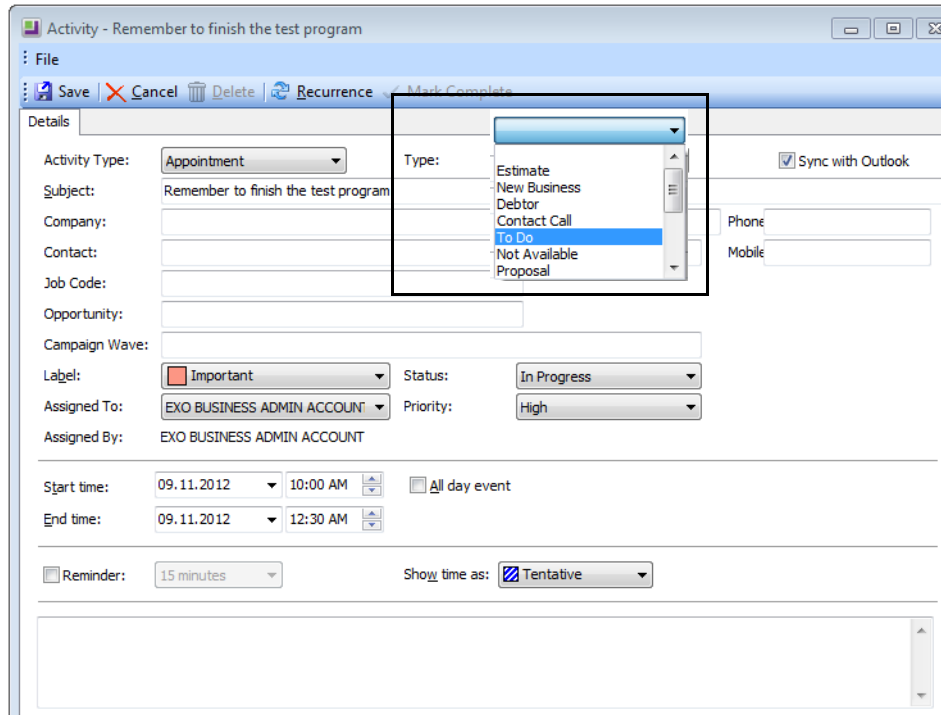
Activities screen - Type dropdown list

To create new Activity Types:

**1**   From the **Setup** menu, select **Setup Activity Types**.

2 Click on the ⬜ New button on the toolbar.
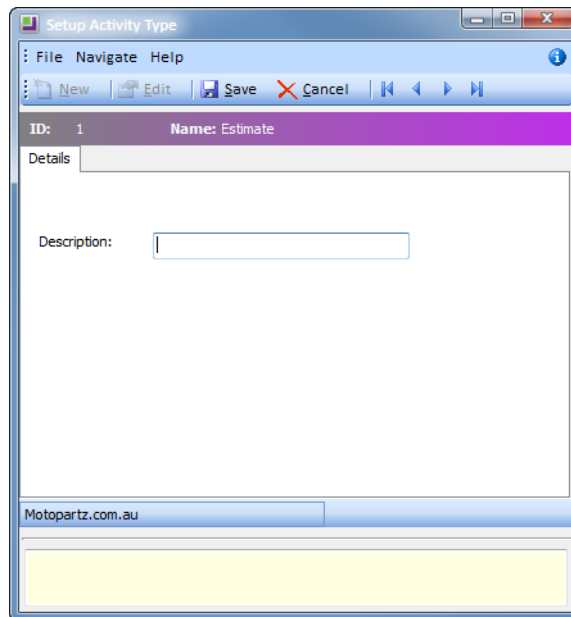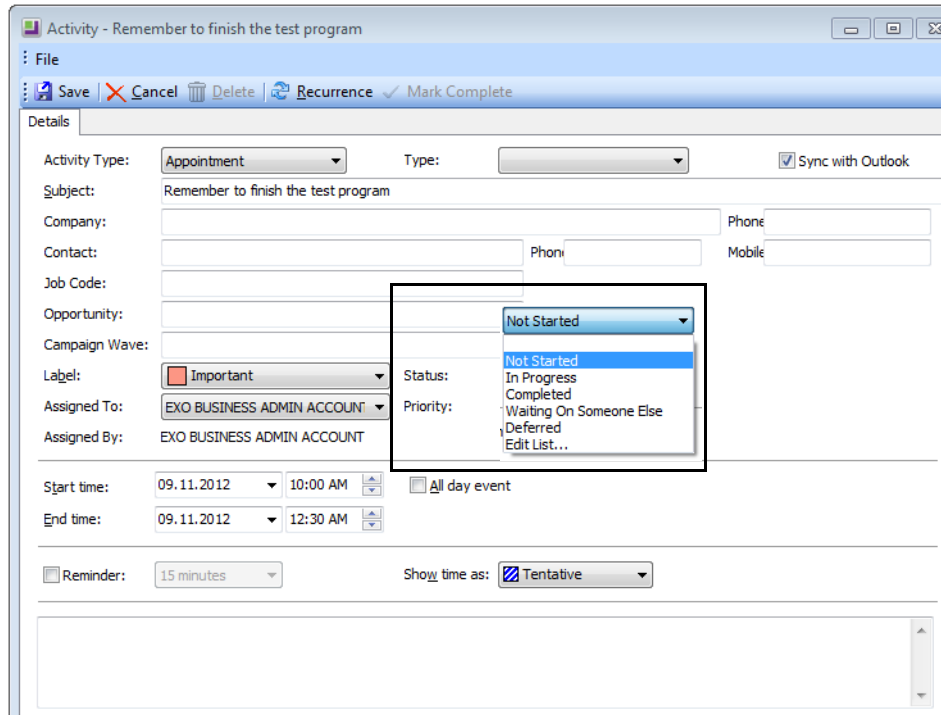

Set up new activity type

3 Enter a ***Description*** for the new type.

4 Click on the 💾 Save button.

To edit an Activity Type:

1 From the **Setup** menu, select **Setup Activity Types**.

2 Double-click on the activity type you wish edit.

3 Make the required changes to the **Description**.

4 Click on the 💾 Save button.

Activity Status
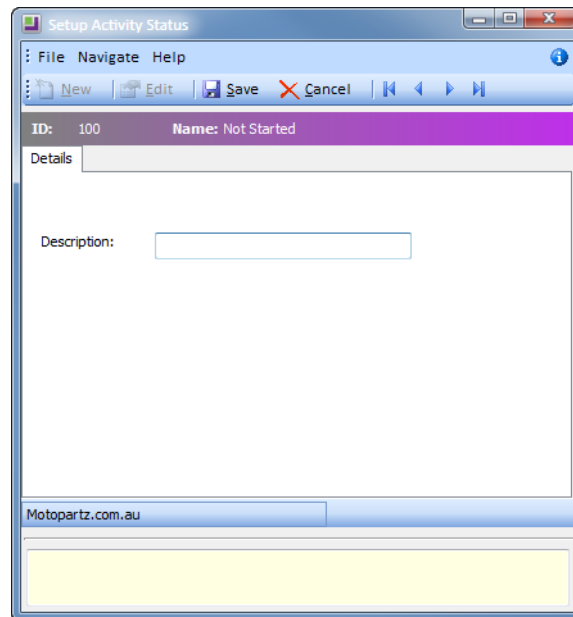
The Activity Status dropdown list is used on the Activity screen:

Activities screen - Status dropdown list

To create a new Activity Status:

1   From the **Setup** menu, select **Setup Activity Statuses**.

2 Click on the ☐ New button on the toolbar.


Set up new activity status

3 Enter a *Description* for the new status.

4 Click on the ☐ Save button.

To edit an Activity Status:

1 From the **Setup** menu, select **Setup Activity Statusses**.

2 Double-click on the activity status you wish edit.

3 Make the required changes to the **Description**.

4 Click on the ☐ Save button.

Company Type

The Company Type dropdown list is used on the Non Account Details screen:
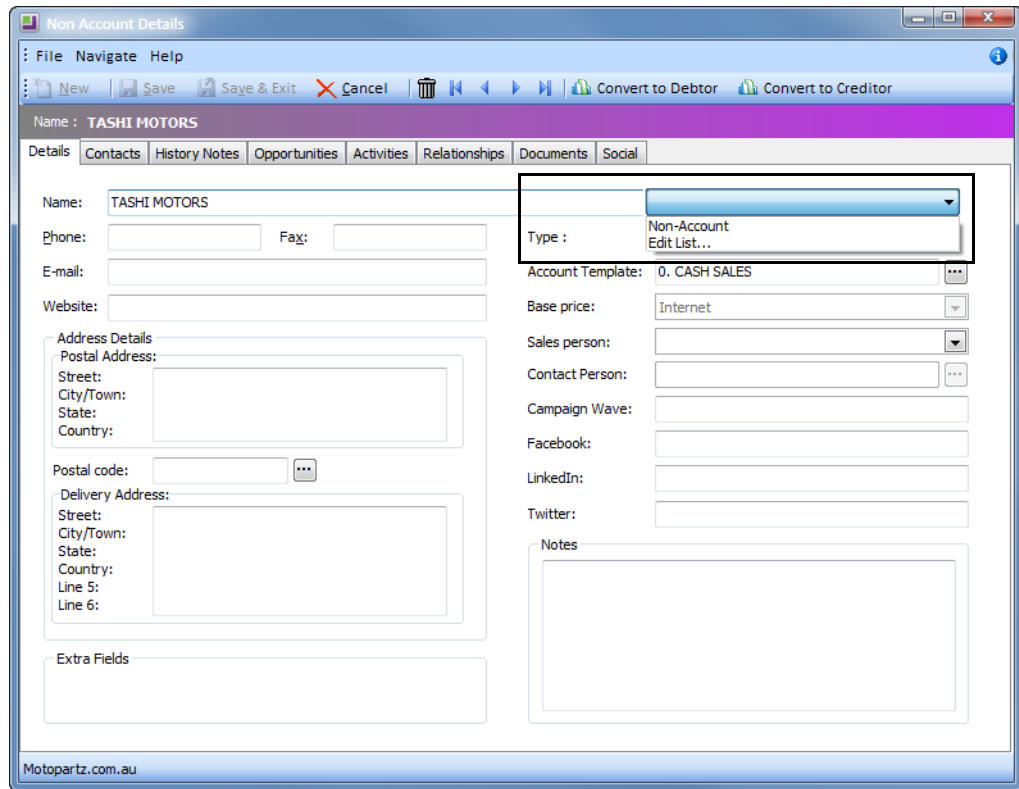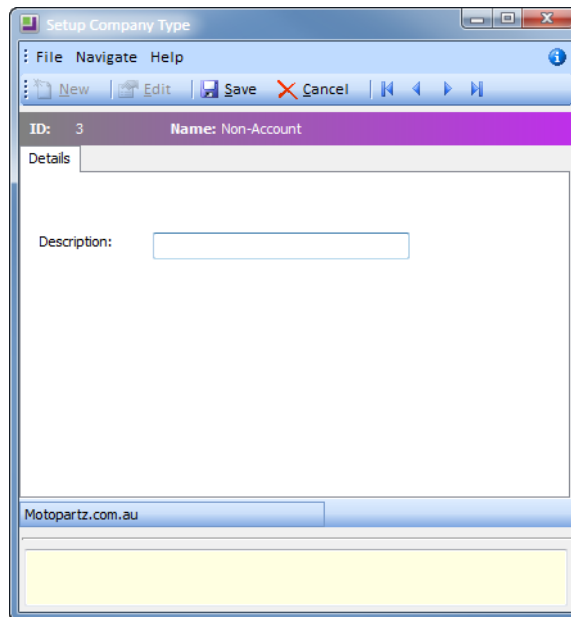

Non Accounts - type dropdown list

To create a new company type:

**1**   From the **Setup** menu, select **Setup Company Type**.

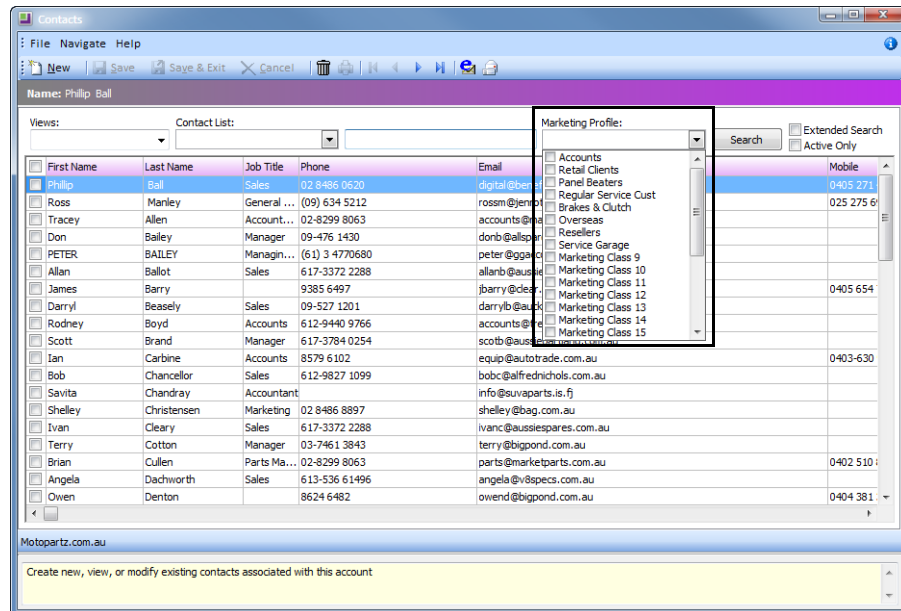**2**   Click on the ⬜ New button on the toolbar.

Set up new company type

3   Enter a *Description* for the new type.

4   Click on the 💾 Save button.

To edit a Company Type:

1   From the **Setup** menu, select **Setup Company Type**.

2   Double-click on the company type you wish edit.

3   Make the required changes to the **Description**.

4   Click on the 💾 Save button.

Marketing Classes
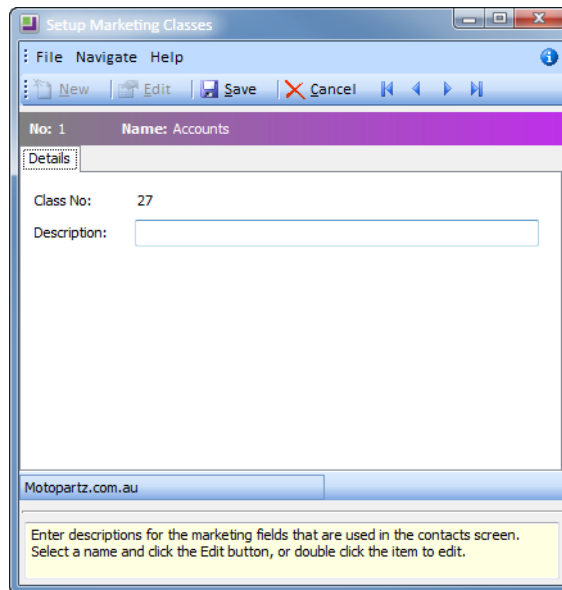
Marketing Classes are assigned to Contacts:

*Contacts - Marketing Classes*

To create a new marketing class:

1 From the **Setup** menu, select **Setup Marketing Classes**.

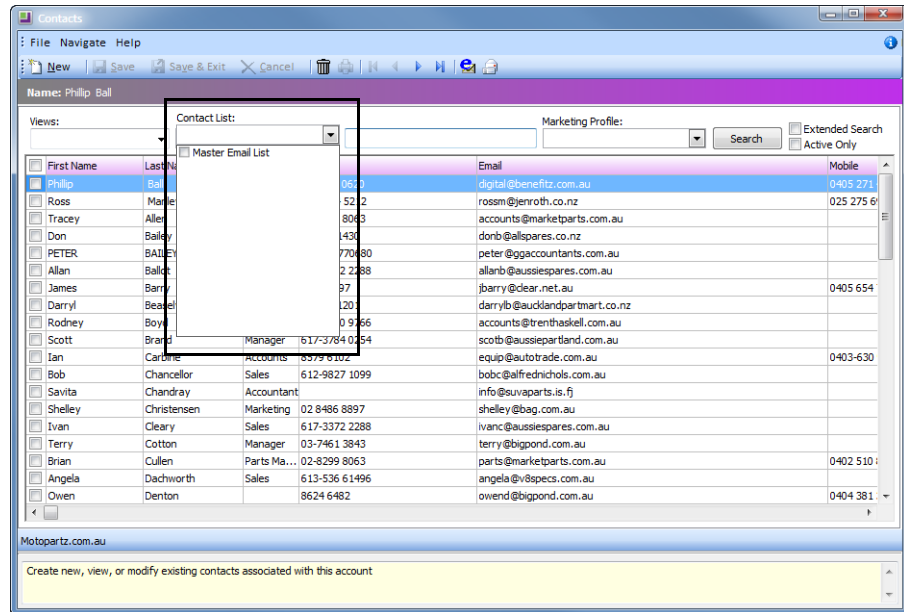**2** Click on the [New] button on the toolbar.

Set up new marketing class

3 Enter a *Description* for the new marketing class.

4 Click on the [Save] button.

To edit a Marketing Class:

1 From the **Setup** menu, select **Setup Marketing Classes**.

2 Double-click on the marketing class you wish edit.

3 Make the required changes to the **Description**.

4 Click on the [Save] button.

Contact Lists

Contact lists are used for bulk communication or processes, e.g. sending marketing communication, adding an activity to a group of contacts. Once set up, contact lists can be used to filter the contacts listed in the Contacts screen:
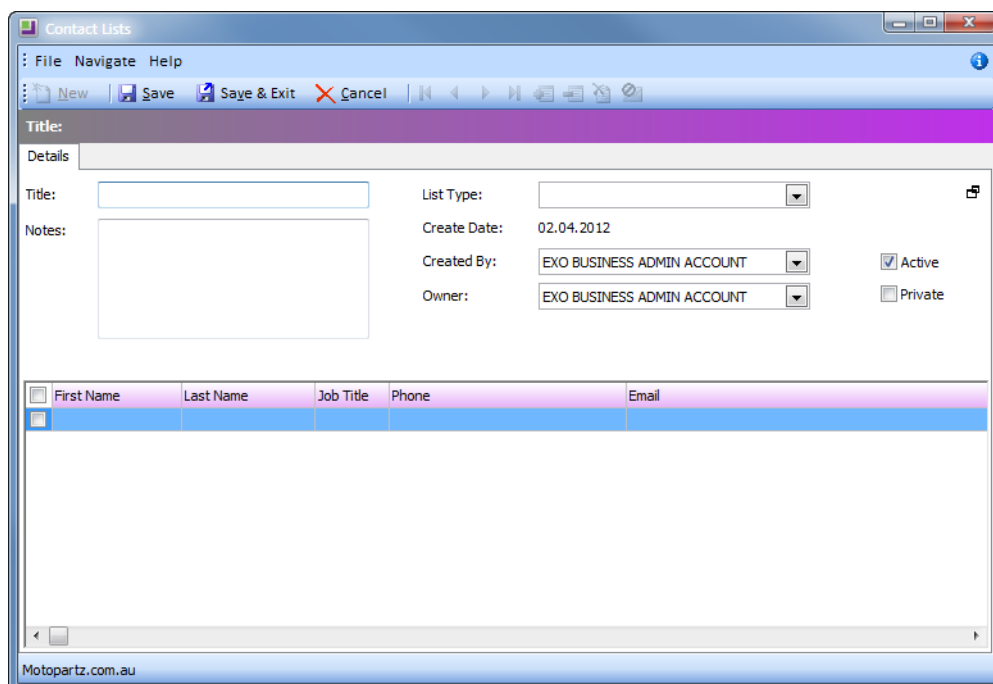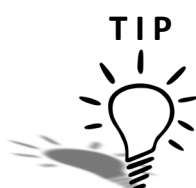

Contacts - Marketing Classes

To create a new Contact List:

1   From the **Setup** menu, select **Setup Contact Lists**.

2 Click on the ⬜ New button on the toolbar.

Set up new contact list

T I P

Right-click on the Contact List and select the option **Copy this List** to create a new list based off the selected list.

3 Enter a *Title* for the new contact list.

4 In the **Notes** field, enter extra information about this list, e.g. what the list is to be used for.

5 From the **List Type** dropdown list, select the type of contacts used to build the list:
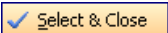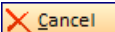
Type	Description
Contact	Select this type to make all contacts available for selection.
Company	Select this type to only make contacts associated with a company account available for selection.
Debtor/ Creditor	Select this type to only make contacts specified as the default contact for a Debtor/Creditor account available for selection.
Non Account	Select this type to only make contact associated with Non Accounts available for selection.
Debtor Contacts/ Creditor Contacts	Select this type to only make contacts associated with Debtor/Creditor accounts available for selection.

6 The **Date Created** field displays the date the contact list was created.

7 the **Created By** field displays the EXO Business staff member that created the contact list.

8 From the **Owner** dropdown list, select the EXO Business staff member that is responsible for this contact list.

9 The option **Active** will automatically be selected for new contact lists, making the contact list available for selection. Unselect the option to make the list unavailable for selection.

10 To restrict the contact list to the EXO Business staff member selected in the **Owner** dropdown list, select the option **Private**. If this option is not selected, the contact list will be available to all staff members for selection.

**11** Click on the [Save] button.

To edit a Contact List:

1 From the **Setup** menu, select **Setup Contact Lists**.

2 Double-click on the contact list you wish edit.

3 Make the required changes.

4 Click on the [Save] button.

To manually add contacts to a Contact List:

1 Edit the relevant contact list.

2 Click on the [icon] icon on the toolbar to manually select contacts to add to the contact list. Select the checkbox against each contact to be added to the list and click on the [Select & Close] button.

3 Contacts manually added will be highlighted in green.

4 Click on the [Cancel] button to close the contact list.

To add contacts using List Building Criteria:

1 Edit the relevant contact list.
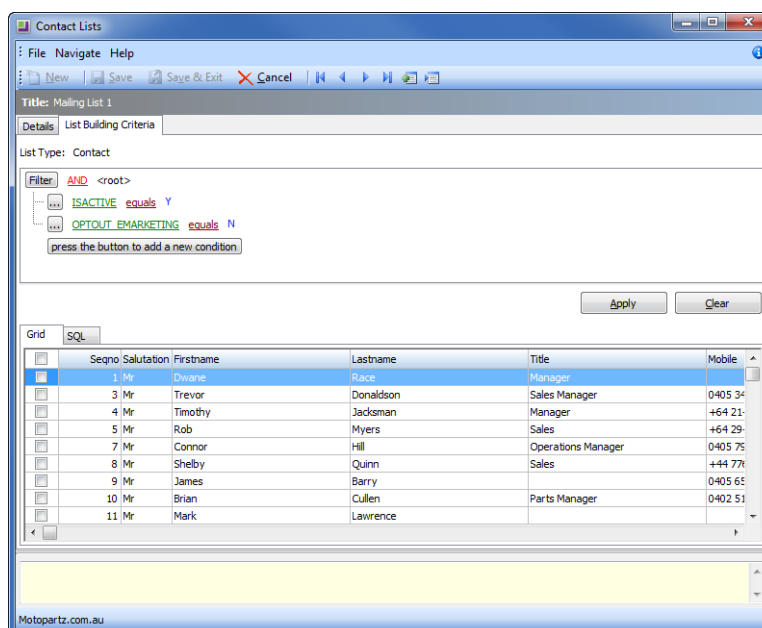
Contact Lists - List Building Criteria

2 By default, Contact List will include active contacts (ISACTIVE equals Y) and contacts that have not opted out of Marketing communications (OPTOUT_EMARKETING equals N).

3 Click on the `press the button to add a new condition` to add an additional filter.

4 Click on the *green* (first text) for a dropdown list of fields that the list can be filtered on.

5 Click on the *red* (middle text) for a dropdown list of the type of filter that can be applied to the selected field.

6 Click on the *blue* (last text) to enter the criterion for the filter, e.g. text for a filter on a text field, a number for a filter on a number or value field, etc.

7 Click on the `...` button to add a condition below the selected filter, group more than one filter together or to remove a filter.

8 Click on the **Apply** button to create a list of contacts that meet the filter criteria.

9 Click on the **Clear Criteria** button to remove all filters.

10 In the **Grid** sub-tab:

- Right-click on a specific contact and select the option **Add Selected Contact to List** to add the selected contact to the list.

- Right-click on any contact and select the option **Add all Contacts to List** to add all the contacts to the list.

- Select the checkbox against each contact. Right-click on a specific contact and select the option **Add Selected Contact to List** to add the selected contacts to the list.

11 A message will appear, confirming the number of contacts added to the list. Click on **Ok**.

12 In the **SQL** sub-tab:

- Click on the **Re-build Filter** button to update the SQL statement after making changes to the filter conditions.

- Click on the **Preview SQL** button to view the SQL statement in a pop-up window.

- Click on the **Manual SQL Mode** to manually enter an SQL statement to be used to generate the list of contacts. Click on the **Run Manual Query** to populate the list using the SQL statement.

WARNING
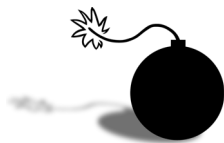
When using the Manual SQL Mode, the graphical filter condition interface will no longer be available. Once a Contact List is changed to Manual SQL Mode and the Contact List is saved, you cannot revert back to the filter condition interface.

To remove selected contacts from a Contact List:

1 Edit the relevant contact list.

2 Select the contact(s) to remove from the list by:

- Selecting the checkbox for the contact(s).

- Left-clicking on the contact.

3 Remove the contact(s) from the list by:

- Right-clicking on the contact and select the option **Deleted Selected Contact from List**.

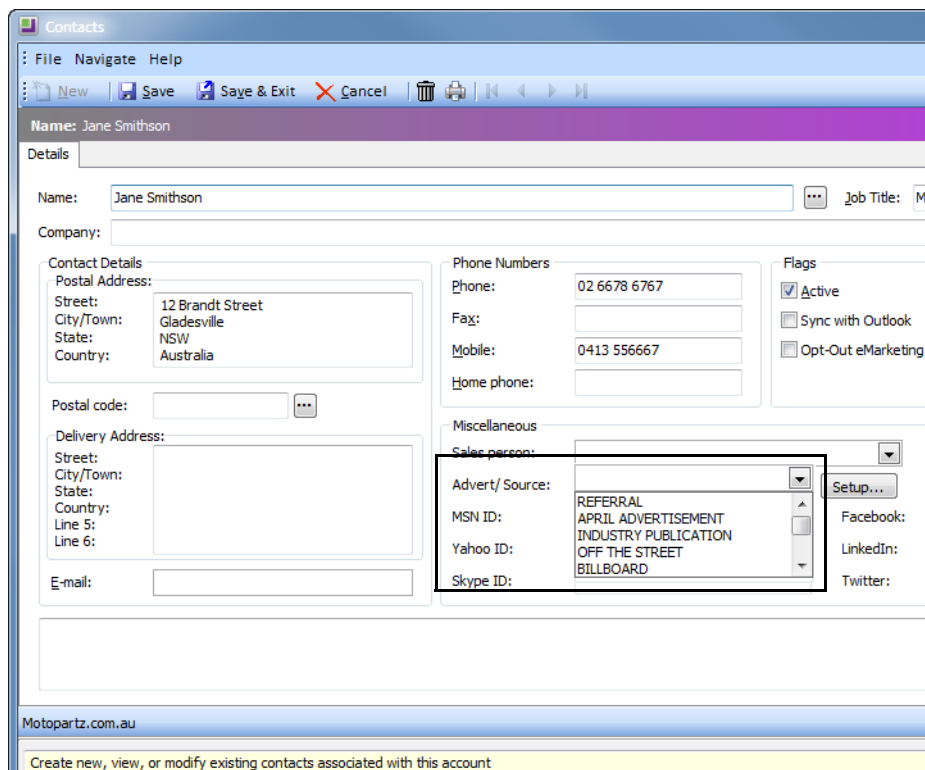- Click on the icon on the toolbar. A confirmation messages will apear. Click on **Yes**.

To remove all contacts from a Contact List:

1 Edit the relevant contact list.

2 Click on the icon on the toolbar. A confirmation messages will apear. Click on **Yes**.

Advertising Types

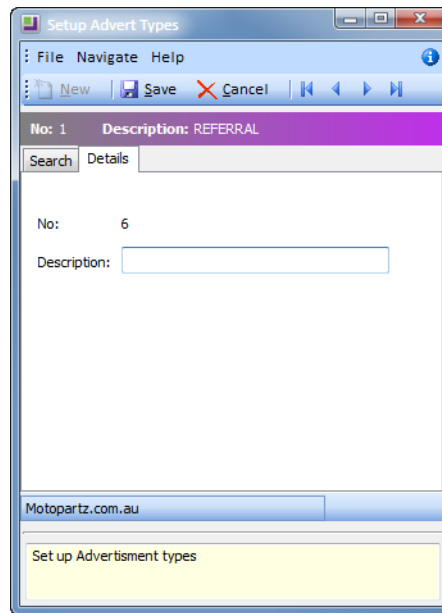The Advertising Types dropdown list is used on the Contacts screen:


Contacts - Advertising Types

To create a new advertising type:

1 From the **Setup** menu, select **Setup Advertising Types**.

2 Click on the ⬜ New button on the toolbar.

Set up new advertising type

3 Enter a *Description* for the new advertising type.

4 Click on the 🔲 Save button.

To edit a Advertising Type:

1 From the **Setup** menu, select **Setup Advertising Types**.

2 Double-click on the advertising type you wish edit.

3 Make the required changes to the **Description**.

4 Click on the 🔲 Save button.

Lead Source

The Lead Source dropdown list is used on the Opportunity screen:
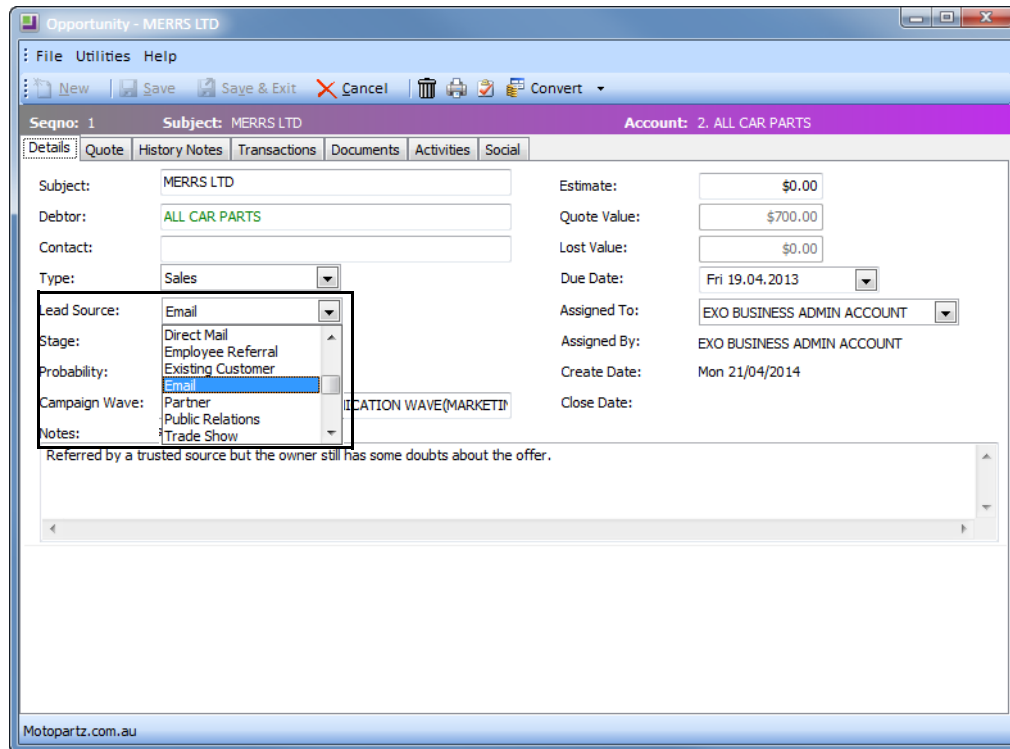
Opportunities - Lead Source

To create a new Lead Source:

1   From the **Setup** menu, select **Setup Lead Types**.

2 Click on the ⬚ New button on the toolbar.
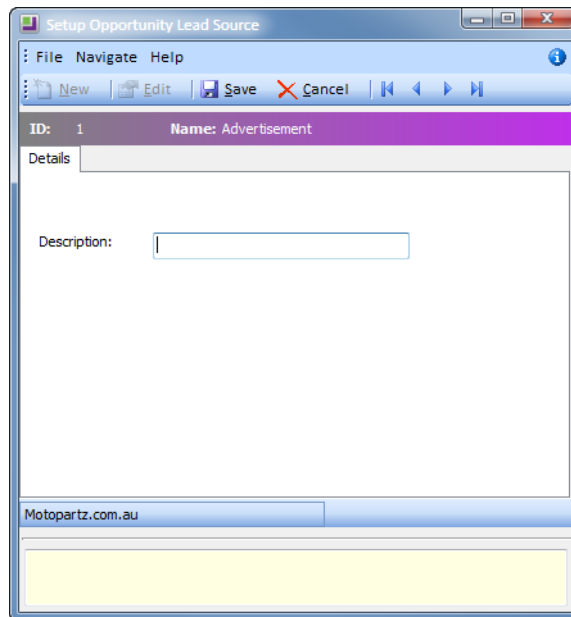
Set up new lead sources

3 Enter a *Description* for the new lead source.

4 Click on the 💾 Save button.

To edit a Lead Source:

1 From the **Setup** menu, select **Setup Lead Types**.

2 Double-click on the lead source you wish edit.

3 Make the required changes to the **Description**.

4 Click on the 💾 Save button.

Opportunity Stages

The Opportunity Stages dropdown list is used on the Opportunity screen:
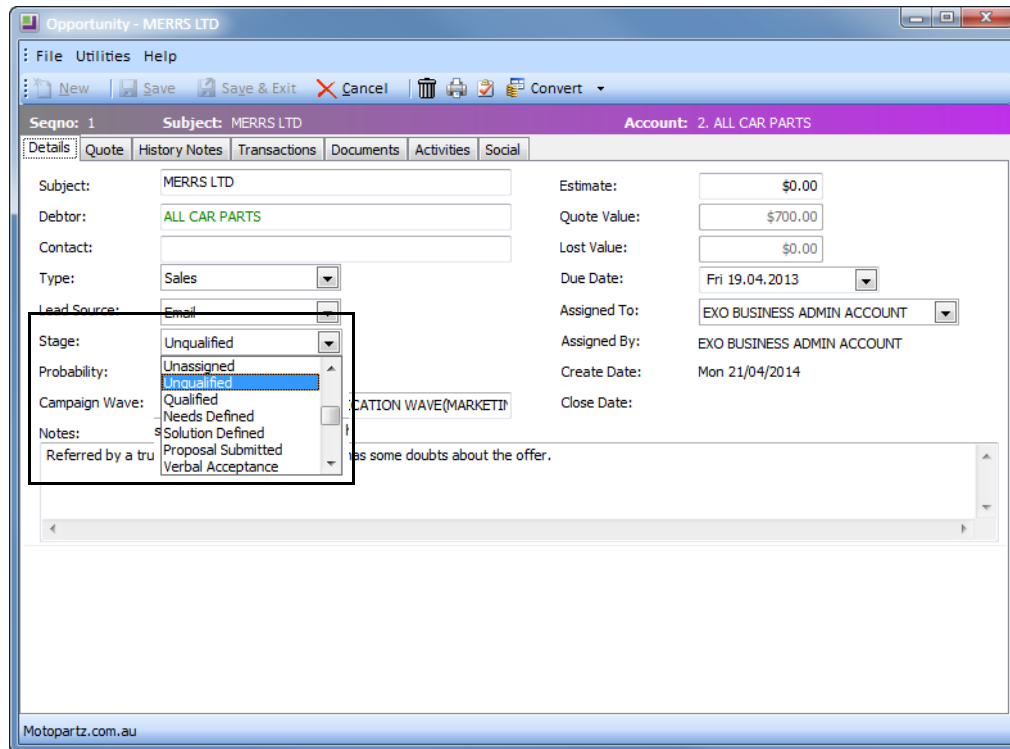
Opportunities - Opportunity Stage

To create a new Opportunity Stage:

1   From the **Setup** menu, select **Setup Opportunity Stages**.

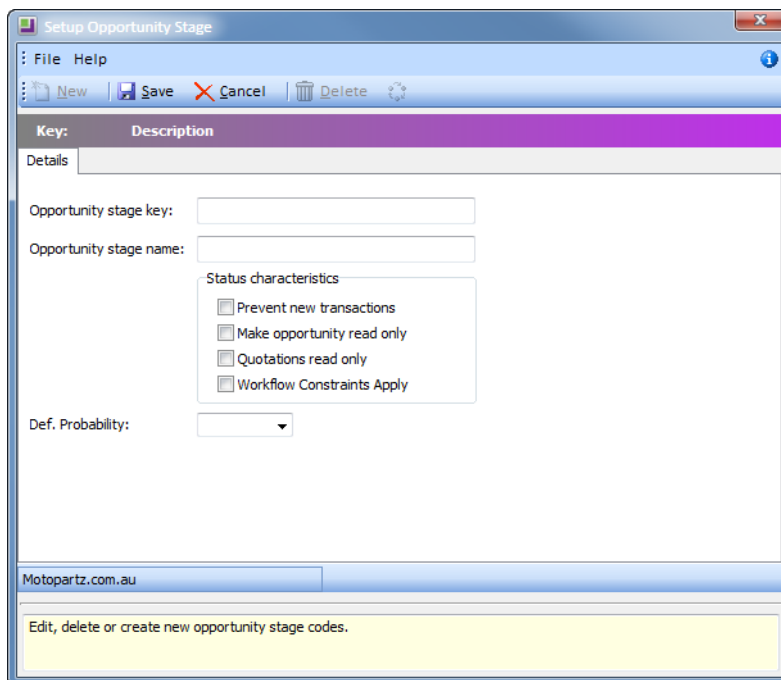**2** Click on the [New] button on the toolbar.

Set up new opportunity stage

3 In the **Opportunity stage key** field, enter a meaningful, single-character, short code to represent this stage.

4 Enter an *Opportunity stage name* for the new opportunity status.

5 Select one of the following system flags:

Flag	Description
Prevent new transactions	Select this option prevent users from adding additional transactions to an opportunity with this stage.
Make opportunity read only	Select this option to prevent users from editing an opportunity with this stage. Only users with opportunity administrator rights can modify opportunities with this stage.
Opportunities are complete	Select this option to indicate that Opportunities with this stage are complete.
Quotations read only	Select this option to lock the Quote tab in the Opportunity screen. This prevents users from making changes to quotes on opportunities with this stage. Only users with administrator rights will be able to access the Quotes tab.

Opportunities are archived	Select this option to indicate that Opportunities with this stage should be archived.
Workflow Constraints Apply	Select this option to specify the stages the Opportunity may be moved to.
Opportunities are are ready to invoice	Select this option to indicate that Opportunities in this stage are ready to be invoiced.
Opportunities are active	Select this option to indicate that Opportunities in this stage are currently active.

6 If the option **Workflow Constraints Apply** has been selected, click on the 🔘 button.
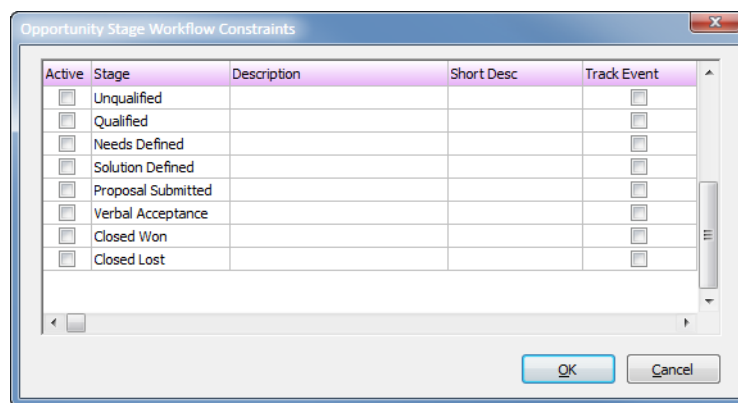
Opportunity stage - workflow constraints

7 Click on the checkbox in the **Active** column to select the stage(s) to which the opportunity can be moved.

8 Changes to an opportunity's stages can be record in the Event Log. Click on the checkbox in the **Track Event** column to record when the opportunity stage is changed to the selected stage(s).

9 Click on the **Ok** button.

10 From the **Def. Probability** dropdown list, select the default probably rate for opportunities at this stage.

11 Click on the 🖫 Save button.

To edit an Opportunity Stage:

1 From the **Setup** menu, select **Setup Opportunity Stages**.

2 Double-click on the opportunity stage you wish edit.

3 Make the required changes to the relevant fields.

4 Click on the 🖫 Save button.
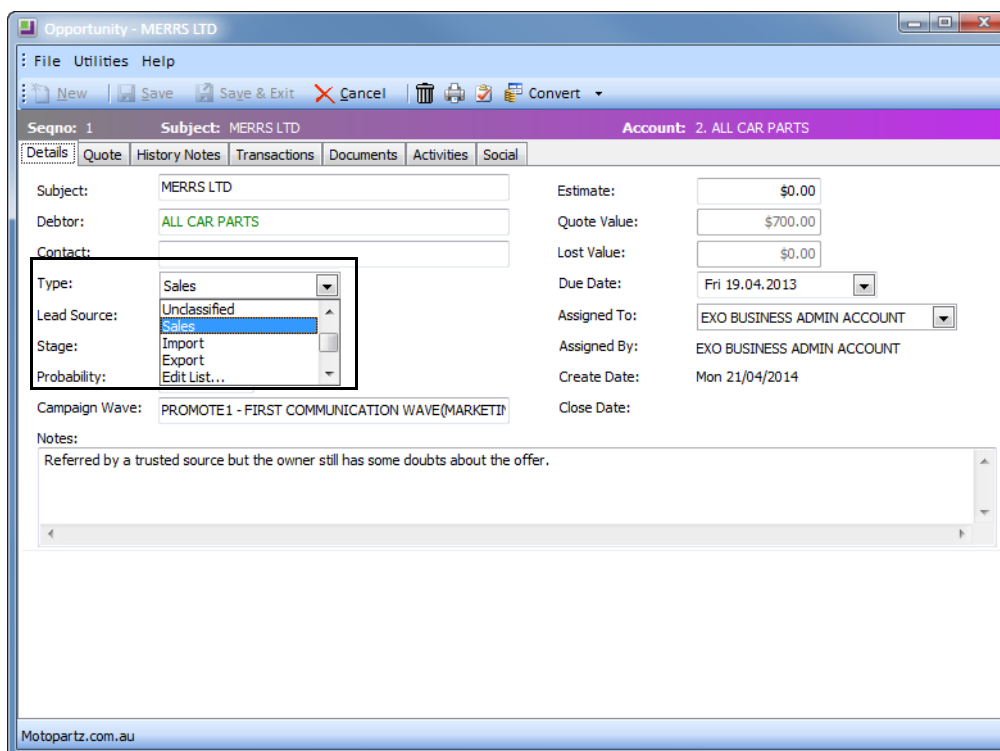
T I P

A default Stage for new Opportunities can be set against each user's profile. Contact your MYOB Business Consultant for more information.

Opportunity Type

The Opportunity Type dropdown list is used on the Opportunity screen:

Opportunities - Opportunity Type

To create a new Opportunity Type:

1   From the **Setup** menu, select **Setup Opportunity Type**.

2 Click on the [New] button on the toolbar.
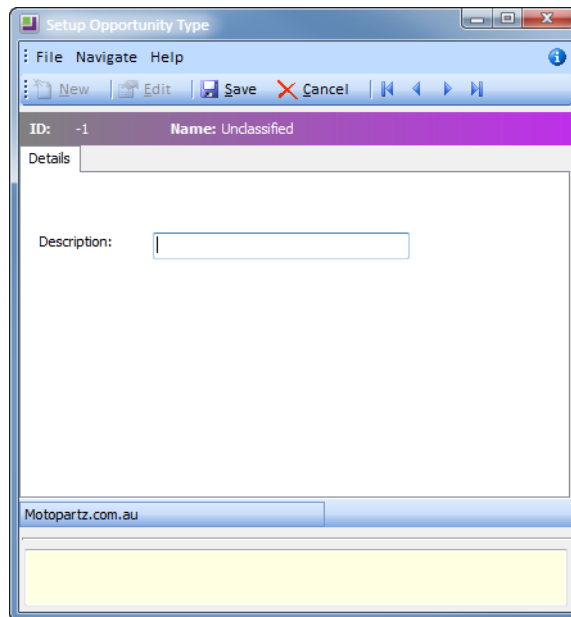
Set up new opportunity status

3 Enter a *Description* for the new opportunity status.

4 Click on the [Save] button.

To edit an Opportunity Status:

1 From the **Setup** menu, select **Setup Opportunity Stages**.

2 Double-click on the opportunity status you wish edit.

3 Make the required changes to the **Description**.

4 Click on the [Save] button.

Campaign Stages

The Campaign Stages dropdown list is used on the Campaign screen:
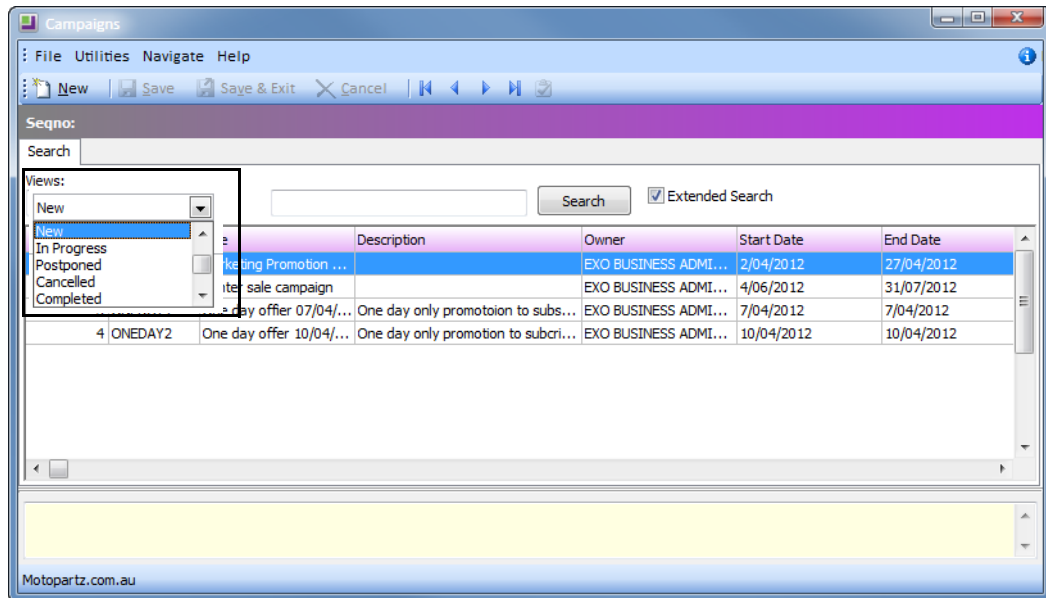
Campaigns - Campaign Stage

To create a new Campaign Stage:

1   From the **Setup** menu, select **Setup Campaign Stages**.

2 Click on the [New] button on the toolbar.

Set up new campaign stage

3 In the **Campaign stage key** field, enter a meaningful, single-character, short code to represent this stage.

4 Enter an ***Campaign stage name*** for the new campaign status.
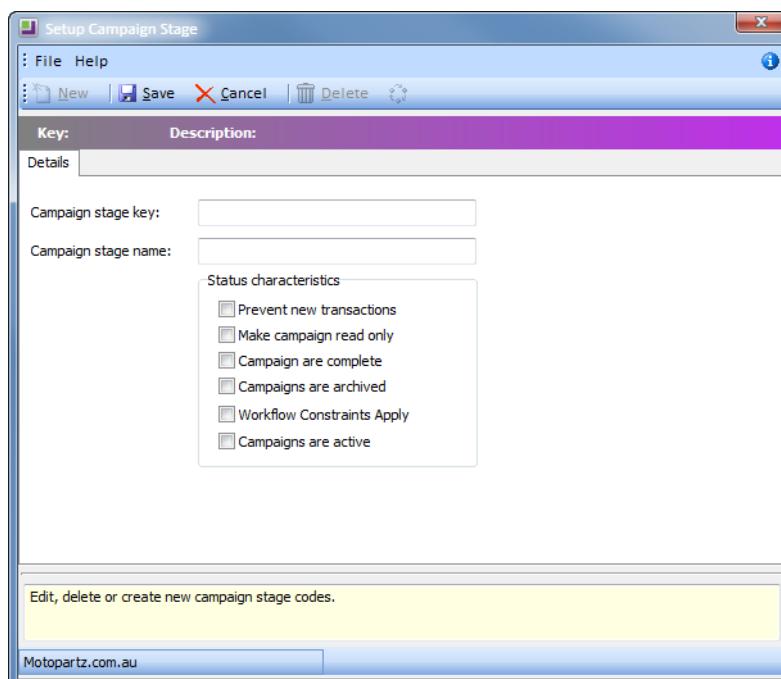
5 Select one of the following system flags:

Flag	Description
Prevent new transactions	Select this option prevent users from adding additional transactions to a campaign with this stage.
Make campaign read only	Select this option to prevent users from editing a campaign with this stage. Only users with campaign administrator rights can modify opportunities with this stage.
Campaigns are complete	Select this option to indicate that Campaigns with this stage are complete.
Campaigns are archived	Select this option to indicate that Campaigns with this stage should be archived.
Workflow Constraints Apply	Select this option to specify the stages the Campaign may be moved to.

Campaigns are active	Select this option to indicate that Campaigns in this stage are currently active.

6 If the option **Workflow Constraints Apply** has been selected, click on the 🔄 button.
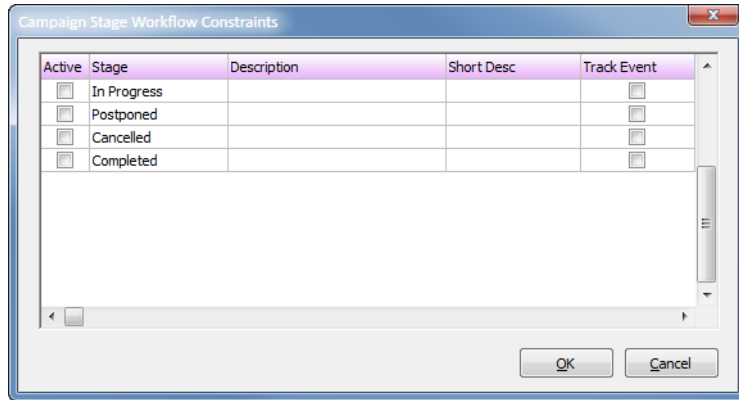
Campaign stage - workflow constraints

7 Click on the checkbox in the **Active** column to select the stage(s) to which the campaign can be moved.

8 Changes to a campaign stages can be record in the Event Log. Click on the checkbox in the **Track Event** column to record when the campaign stage is changed to the selected stage(s).

9 Click on the **Ok** button.

10 Click on the 🔘 Save button.

To edit a Campaign Stage:

1 From the **Setup** menu, select **Setup Campaign Stages**.

2 Double-click on the campaign stage you wish edit.

3 Make the required changes to the relevant fields.

4 Click on the 🔘 Save button.

TIP

A default Stage for new Campaigns can be set against each user's profile. Contact your MYOB Business Consultant for more information.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✔
Create predefined Activity Types	
Create predefined Activity Statuses	
Create predefined Company Types	
Create predefined Marketing Profiles	
Create predefined Contact Lists	
Create predefined Advertising Types	
Create predefined Lead Sources	
Create predefined Opportunity Stages	
Create predefined Opportunity Types	
Create predefined Campaign Stages	

Master Records

In this unit you will learn the basic functionality of the companies, contacts and stock master records.

By the end of this unit, you will be able to:

▶ Create a Company

▶ Create and maintain Contacts

▶ Look up Stock items

Overview

As part of the EXO Business suite, master records for Debtors, Creditors, Stock and Contacts can be access from within EXO CRM.

Access to Debtors, Creditors and Stock masters from EXO CRM is limited to read-only. Changes can only be made to these areas from the EXO Business Core module.

Companies

....

Account > Companies

T I P

The Company Search view is available as a separate window and as a Dashboard widget that can be added to the EXO CRM interface.

The Companies view in EXO CRM displays a list of all Debtors, Creditors and Non Accounts in one list.

Company Search screen

For easy identification, account types are colour coded:

- Green = Debtor

- Red = Creditor

- Black = Non Account

The following details are displayed for each company:

Detail	Description
Company Name	The name of the account.
Primary Contact	The name of the account's default Contact, if one has been selected on the account's Contacts tab.
Phone Fax Email	Contact details for the account.
Type	The type of account. This will be one of the following: • Debtor • Creditor • Non Account

The companies listed in the search screen can be filtered by using different **Views**.
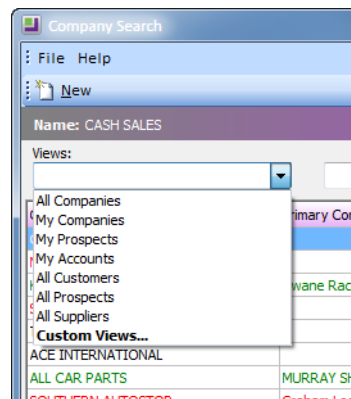
Company Search - Views dropdown list

The following default views are available:

View	Description
All Companies	This view lists all companies, regardless of the type of account or the assigned account manager.
My Companies	This view lists all the companies for which the current user is the assigned account manager.
My Prospects	This view lists all the Non Accounts for which the current user is the assigned account manager.
My Accounts	This view lists all debtor and creditor accounts for which the current user is the assigned account manager.

All Customers	This view lists all Debtors.
All Prospects	This view lists all Non Accounts
All Suppliers	This view lists all Creditors.
Custom Views	Custom views will be listed next. Select the option **Custom Views** to create a customised view for the current user.

To create a custom view:

1 From the **Views** dropdown list, select **Custom View**.

2 A list of custom views will be displayed.

3 To edit a custom view, select the view in the list and click on the ⬚Edit button.

4 To create a new custom view, click on the ⬚New button.
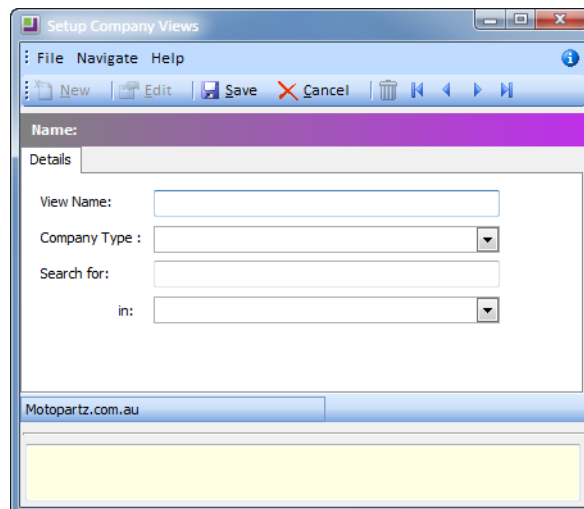
Companies - Create new custom view

5 Enter a **View Name**.

6 From the **Company Type** dropdown list, select the type of companies to include in the view, e.g. Debtors, Creditors or Non Accounts.

7 In the **Search for** field, enter the search criteria for this view.

8 From the **in** dropdown list, the field(s) in the company data to search in.

9 Click on the ⬚Save button.

To set up a new Company:

1 From the **Account** menu, click on **Companies**.

2 Click **New** to create a new non-account.
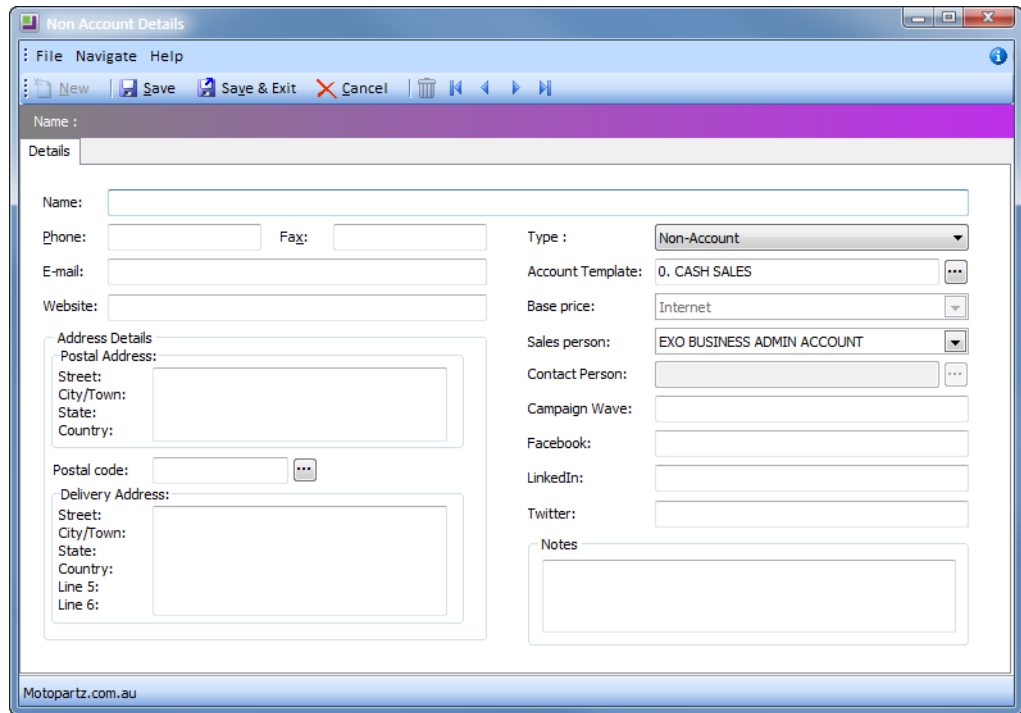
New Company

3 Enter the name, contact details, etc.

4 From the **Type** dropdown list, the default option ***non account*** will be available. Select **Edit List**... to add additional account types to the list.
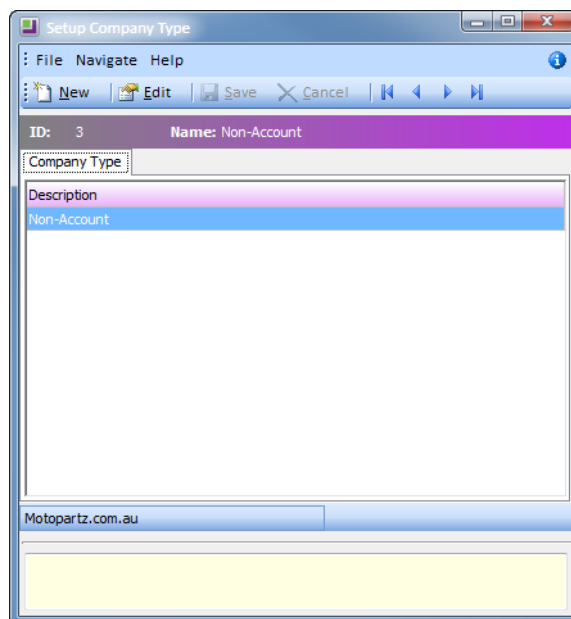
Set up Company Type

- Click **New** to create a new non account type.

- Enter the details of the non account type and click on **Save**.

5 An **Account Template** can be selected for the Non Account. When the Non Account is converted to a debtor or creditor, the assigned account template will be used as a basis for creating the debtor or creditor master record. Click on the ⊡ button to search for and select an account template to assign.

6 From the **Base price** dropdown list, a price can be assigned to the non account.

7 Click on the ⊡ button to assign a Sales Person to this account.

N O T E

If EXO CRM is installed and licensed, a field will be available to track the **Campaign Wave** that generated this Non Account.

8 In the **Facebook**, **LinkedIn** and **Twitter** fields, enter the company's Facebook, LinkedIn and Twitter details. Information about this company on these social media services will be displayed in the Social tab.

9 In the **Notes** field, enter any notes pertaining to this non account.

10 Click on the 🖫 Save button.

T I P

Once you have saved the Non Account, the Contacts, History Notes, Opportunites, Activities, Relationships, Documents and Social tabs will be available.

To add a new company using the Company Quick Add widget:

Account > Company Quick Add or **F3**

1 Click on the 🗋 New button.

New Company screen

2 Enter a **Company Name, Phone** number, **Email** address.

3 From the **Type** dropdown list, select the type of company to add.

N O T E

When adding a new company, the **Type** will default to Non Account. When an opportunity progresses to a Sales Order, the company will be converted to a Debtor account. The account can also be manually converted to either a Debtor or Creditor account from the Non Account Master screen.
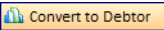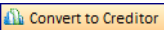
I M P O R T A N T

When a Non Account is coverted to a Debtor or Creditor account, additional information must be entered. This cannot be done via EXO CRM, but through EXO Business core only.

4 Click on the **Ok** button.

To convert a Non Account to a Debtor or Creditor:

1 From the **Accounts** menu, click on **Non Accounts**.

2 Double-click on the record you want to convert.

3 In the Non Account Details screen, click on the 🔲 Convert to Debtor to convert the non account to a debtor.

4 In the Non Account Details screen, click on the 🔲 Convert to Creditor to convert the non account to a debtor.

5 Once the non account is converted, you will be presented with the Debtors or Creditors Maintenance screen respectively.

To open a company's record:

1 Double-click on the company.

2 Depending on the company type, the corresponding debtor, creditor or non account master screen will be displayed.

N O T E

Refer to the EXO Business Help file for more information on the Debtors, Creditors and Non Account Master screens.

To search for a company:

1 In the **Search** field, enter the name of the company you are searching for.

2 Click on the **Search** button.

The following actions are also available by right-clicking on the company:

- Send an email to the company.
- Create a new Opportunity for the company.
- Create a new activity for the company.

Contacts

Contacts add an element of flexibility when dealing with customers and suppliers. Contacts are entities in their own right and do not have to be linked with a Debtor, Creditor or Non-account.

- An individual contact can be linked to one or many accounts if required.

- One debtor or creditor account can have many contacts if required.

- Relationships can be defined between contacts as well as between contacts and accounts.

- Activities (Tasks/Appointments) can be recorded against contacts.

This section provides details on some of the more commonly used features when dealing with contacts.
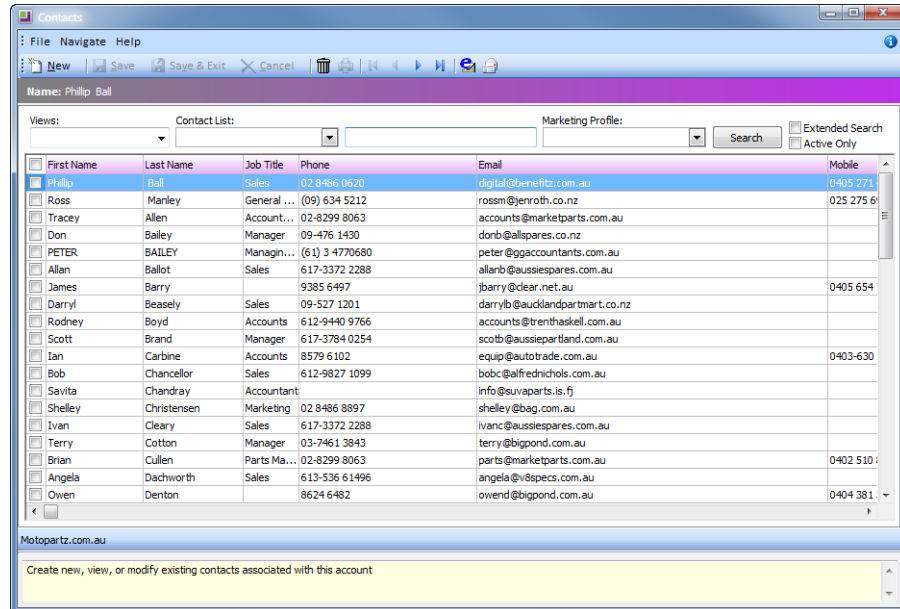
TIP

The Contacts Search view is available as a separate window and as a Dashboard widget that can be added to the EXO Business CRM interface. A Contacts Quick Add widgets is also available for quick entry of new contacts.

Search for a contact

To search for a contact:

1 Open the contacts screen: **Account > Contacts**.

Account Contacts search screen

2 From the **Views** dropdown list, select a pre-defined filter, e.g. Sydney-based contacts. See *'To create a custom view:'* on page 62 for instructions on creating Views.

3 From the **Contact List** dropdown list, select a pre-defined contact list. See *'To create a new Contact List:'* on page 2 for instructions on creating Contact Lists.

4 Enter appropriate search information in the search field (e.g. part of the surname).

5 To filter on specific marketing profiles, select the option **Marketing Profile** and select the respective profiles in the dropdown list. See *'Other contact information'* on page 65 for instructions on creating Marketing Profiles.

6 The **Extended Search** option is unselected by default. This searches for the Search string in the address, email, phone number and linked debtors fields, as well as the contact name. If you have a small database, or want to extend your Search to beyond contact name,select this option.

7 Select the **Active** option if you only want to search active contacts only.

8 Click on the **Search** button to search for contacts that fulfil the Search criteria.

9 Double-click on the Contact to open it for review/amendment.

To create a custom view:

1 From the **Views** dropdown list, select **Custom View**.

2 A list of custom views will be displayed.

3 To edit a custom view, select the view in the list and click on the 🔲Edit button.

4 To create a new custom view, click on the 🔲New button.
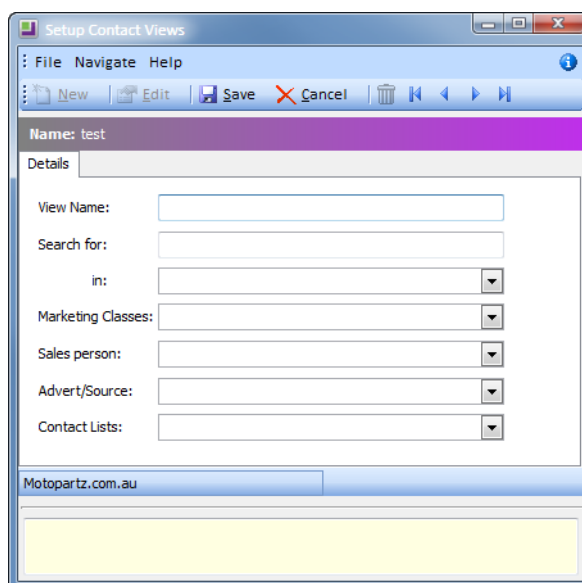
Contacts - Create new custom view

5 Enter a **View Name**.

6 In the **Search for** field, enter the search criteria for this view.

7 From the **in** dropdown list, the field(s) in the contact data to search in.

8 From the **Marketing Classes** dropdown list, select the Marketing Classes to be included in the View. Only contacts assigned the selected Marketing Classes will be included in the View.

9 From the **Sales person** dropdown list, select the Sales Person to be included in the View. Only contacts assigned the selected Sales Person will be included in the View.

10 From the **Advert/Source** dropdown list, select the Advert/Source to be included in the View. Only contacts assigned the selected Advert/Source will be included in the View.

11 From the **Contact List** dropdown list, select the Contact List to be included in the View. Only contacts assigned the selected Contact List will be included in the View.

12 Click on the 🔲Save button.

The following additional options are available on the Contact Search widget by right-clicking on a Contact:

Function	Description
Synchornise to outlook	Synchronise the details of this contact with Microsoft Outlook.
Send Email	Send an email to this contact. **Note:** This option is only available if an email address has been entered for the contact.
New Opportunity	Create a new Opportunity for this contact.
New Activity	Create a new Activity for this contact.
Selected Items > Synchronise to Outlook	Synchronise the details of all selected contacts with Microsoft Outlook.

New Contact

If the contact you are looking for is not there, you can create a new contact.

To create a new contact

1 From the Contacts screen, click on the **New** button. A blank screen will appear, ready for you to enter information into the details tab of the account.

New Contact entry screen

2 Enter the contact's name in the order First name / Last name (e.g. Jane Smithson).

N O T E

If you want to add a salutation (e.g. Ms, Mr) and check the order of the name, click on the ellipsis (...) next to the name field. This will enable you to enter the contact's Salutation, First name and Last name separately.

3   Enter the **Postal Address**. Street, City/Town, State and Country are broken down into separately lines.

T I P

Click the [icon] icon in the toolbar and choose to copy either the company postal address or company delivery

4   Enter the post code into the **Post Code** field. Click on the ellipsis (...) to search for a postcode using the suburb name.

5   Enter the **Delivery Address** (if different to Postal Address). There are two additional lines which could be used for specific delivery instructions pertaining to the address (e.g. nearest cross street Digby Drive). If you do not enter a delivery address the postal address will be replicated on most reports.

6   Enter an **email** address. If this contact is to become the default contact for a debtor/creditor account, this is the address that will be used for emailing invoices and statements, remittance advices, etc.

7   Enter **Phone Numbers** including any relevant area codes.

8   Select the option **Sync with Outlook** to synchronise this contact with Outlook every time a synchronisation is performed.

N O T E

Refer to the EXO Business User Guide or Online Help for more information on Outlook synchronisation.

9   Select the option **Opt-Out eMarketing** to exclude the contact from any electronic marketing communications. The contact will also be exluded from Contact Lists.

10 Assign a **Sales Person** from the dropdown list.

11 Nominate an **Advert/Source**. Choose from the dropdown list of referral sources.

N O T E

The A**dvert/Source** list can be edited by clicking on the **Setup** button next to the field. Click on the **New** button to add a new referral source and then click on **Save**. Close the window to return to the Account Contacts screen.

12 Enter an **MSN id**, **Yahoo id** and **SKYPE ID** as appropriate.

13 Enter the contact's **Facebook**, **LinkedIn** and **Twitter** details to display information from these social media services in the Social tab.

14 Click on the **Save** on the toolbar. This will save the contact details entered so far and display the rest of the tabs on the Contacts screen. These include Marketing, Invoices, Orders, Notes, History Notes, Docs, Accounts, Relationships, Activites, Opportunities and Social.

T I P

Click on the 🗓 icon to sychronise this contact with your Outlook contacts.

Other contact information

Once you have saved your contact, additional tabs become available for entry of information and review.

Contacts > Marketing

The **Marketing** tab provides the facility to set up groups for marketing purposes that are independant of a contact's membership in any other account or pricing group.

A contact can be a member of more than one marketing class and up to 26 marketing classes can be set up.

Click on the Setup Marketing Classes icon on the toolbar to create new marketing classes or edit the names of existing classes. If you are planning to change the name of a marketing class, make sure that the existing contacts assigned to that class are still relevant.
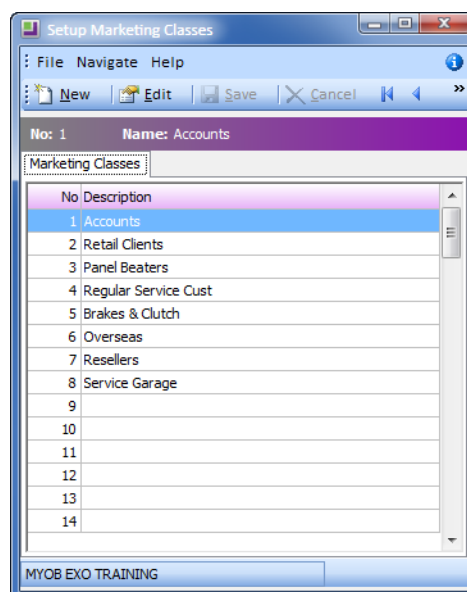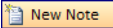

Setup Marketing Classes

Contacts > Invoices tab

The invoice tab lists all the debtor or creditor invoices that relate to this contact. You can drill down from here to view more details.

Contacts > Orders tab

The orders tab lists all sales or purchase orders that relate to this contact. You can drill down from here to view more details about the order.

Contacts > Notes tab

The Notes tab allows recording of any general information relating to the contact. Click on the New Note in the toolbar to automatically insert date, time and your username, then enter details as required. This will provide a simple list of entries that can be printed if required by clicking on the 🖨 on the toolbar.

Contacts > History Notes tab

The History notes tab provides a more structured method for note taking. The top half of the screen provides a list of the history notes sorted by Date. The lower half shows the details of the note that is currently selected.
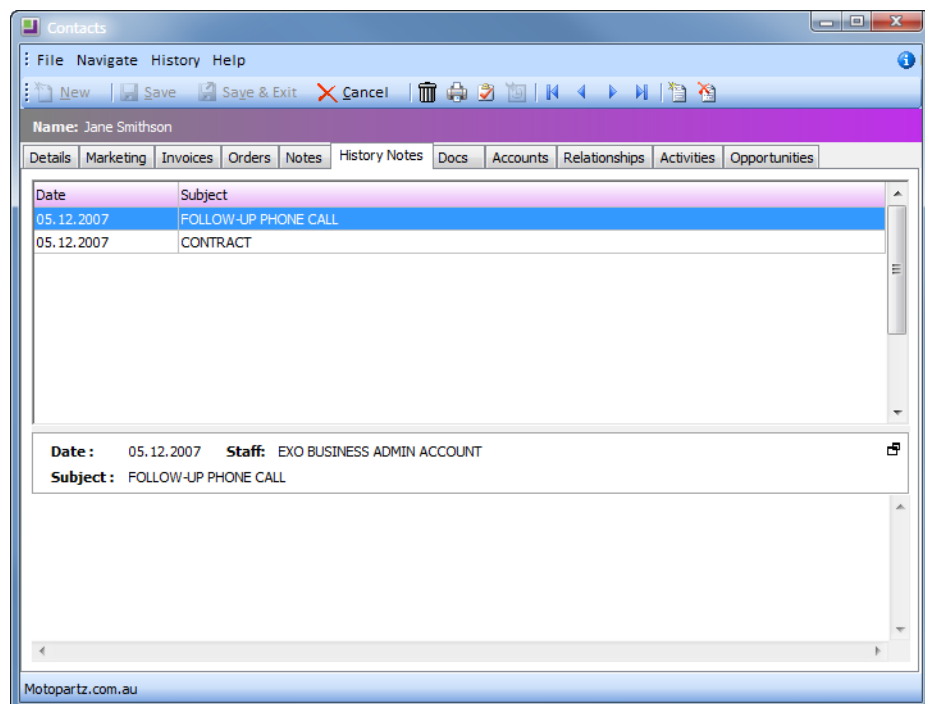
History Notes Screen

Click on the 📄 button to create a new history note.

History notes can be emailed. Open the history note and click on the Email this History Item icon to email the note to the contact or to a third party.

History Notes can be printed. Open the history note and click on the 🖨 button in the toolbar. This will print the history note to the default printer.

Contacts > Docs tab

The Contacts tab provides a list of all the documents that have been linked to the contact. These can be any type of file that is recognised by Windows, e.g. word processing, graphics or spreadsheet files. See later in this section on how to import a document to a contact.

Contacts > Accounts tab

The Accounts tab lists the accounts that are linked to this contact (e.g. a debtor or creditor account). From here you can drill down to the assigned account to look further into the transaction history if required.

Refer to *'Linking Contacts with a company'* on page 69 for details on linking contacts to accounts.

Contacts > Relationships tab

The Relationships tab allows you to create links between contacts (in addition to any links they may already have with a debtor or creditor account). You can setup different relationship types depending on your business requirements. The following example shows that Jane Smithson is a contact for Aussie Spares, as well as manager of Allan Ballot who is also a contact for Aussie Spares.
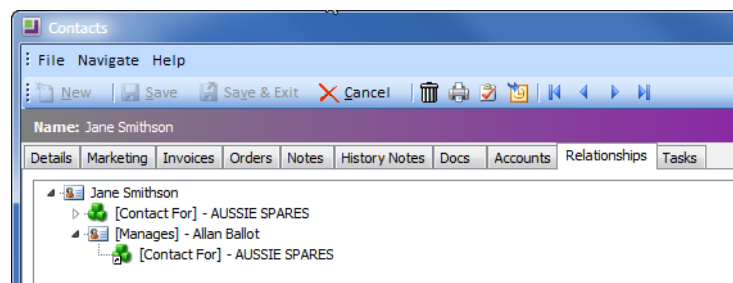
Relationship tab under Contacts screen

To establish a relationship:

1 Go to the Relationships tab of the contact for which you want to establish a relationship.

2 **Right-click** on the contact and select **New.**

3 Select the appropriate Relationship Name (i.e. employee, manages). The relationship name that you choose defines the list that the system puts forward:

- **Manages** returns a list of contacts

- **Employee** returns a list of existing staff members for the organisation

- **Key Stakeholder** returns a list of creditor accounts

- **Supplies** *to* returns a list of contacts

- Alternatively, you can setup a new relationship category.

4   Click on the ellipsis **(...)** to search a list of contacts/accounts to define the relationship with. **Double-click** on the appropriate entity and the relationship will be established. The corresponding relationship will also be established in the second account.
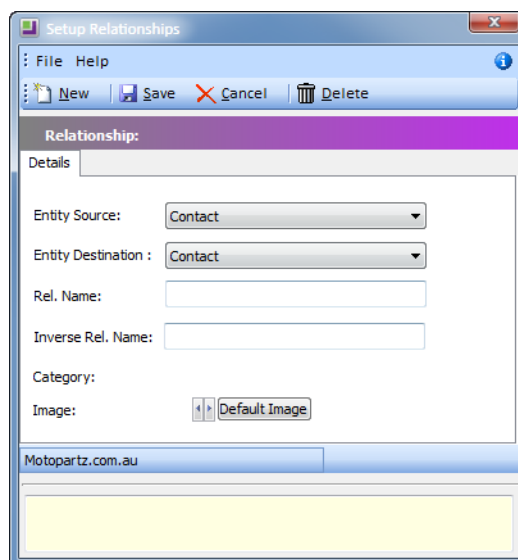
N O T E

To remove a relationship simply **right-click** on the contact/account and select **Remove**.

You can define new relationship types to suit your business

To set up new relationship category:

1   Go to the Relationships tab of an account.

2   **Right-click** on the contact name under the Relationships tab

3   Select **Setup relationships**.

4   Click **New** to setup a new relationship.

Set up Relationships

5   Choose the Entity source and the Entity destination (contact, customer, supplier, non account, staff).

6   Define the relationship name and the inverse relationship name.

7 Assign an image, if required, by clicking on the arrow next to the **Default Image** button. If you want to revert to the system defined image, click on the **Default Image** button.

N O T E

When creating new relationships the *relationship name* will appear in the relationships screen of the source contact (or account), while the *invers rel. name* will appear in the relationships screen of the destination contact (or account). There is no need to establish the relatfionship twice.

Contacts > Activities

The Activities tab lists all the existing tasks/appointments that relate to the contact. You can also enter new tasks/appointments relating to the contact from this tab. Refer to *'Activities'* on page 93 for more information on Activities.

Contacts > Opportunities

The Opportunities tab lists all the existing opportunities that relate to this contact. You can create new opportunities relating to this contact from this tab.

To create a new opportunity relating to this contact:

1 Click on the 🖼 button on the toolbar.

Refer to *'Opportunities'* on page 107 for more information on oppertunities.

Contact > Social

The Social tab lists information about the contact from various social media services. If no social media details have been entered on the Details tab, the sub-tab will display the results of a search for the contact's name.
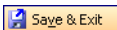
Linking Contacts with a company

Once you have setup a new contact, you can assign it to a debtor, creditor or non account.

To associate a contact to a debtor, creditor or non account:

1 Open the account you wish to assign the contact to.

2 Click on the **Contacts** tab.

3 Once in the contacts tab you can either assign and create a new contact, or you can associate an existing contact to the account:

Action	Description
Associate a new contact	• If the contact does not already exist on the database, click on the icon in the toolbar of the **Contacts** tab. • The new contacts screen will appear with the company details already completed. • Enter the contact details as required and click on to assign to the account. • Click the icon in the toolbar of the new contact screen to copy the company's address to the contact address.
Associate an existing contact	• If the contact you wish to associate is already on the database, click on the icon. • Search for the contact and then **double-click** the contact to assign it to the account.

Any contact can be assigned default contact status, however there can only be one default contact per account.

To assign default contact status:

1 Open the account for which you wish to assign default status.

2 Click on the **Contacts** tab.

3 Make sure that the correct contact is highlighted then click the icon.

Synchronising Contacts

EXO Business integrates with the Microsoft Outlook Express client for the two-way synchronisation of Events (Tasks and Appointments).

I M P O R T A N T

Synchronisation with Microsoft Exchange Server is not supported.

To synchronise Contacts:

1 Double-click on the contact record.

2 Click the button.

3 Right-click on the Contact and select Synchronise to Outlook.

N O T E

Outlook contacts will be sorted under their first name. Check with your system administrator / implementing partner to resolve this if required.

When Contacts are synchronised, the following updates occur:

- Any new Contacts in EXO Business are exported to Outlook.

- Any new Contacts in Outlook are imported to EXO Business.

- Any existing Contacts that have been modified in EXO Business are updated in Outlook.

When synchronising Contacts, EXO Business is **always** used as the master database, i.e. the details of Contacts in EXO Business overwrite the details of the corresponding Contacts in Outlook.
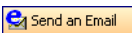
Emailing Contacts

Account > Contacts > Documents

There are two methods for sending an email to a contact within MYOB EXO Business:

- The first method is simply a link to your default email program and does not keep a record in EXO Business.

- The second method will keep a record in the history notes section of the Contacts screen.

To email a contact:

1 Open the **Account Contacts** screen and search for the required contact.

2 Click on the **Docs** tab of the contact.

3 Click on the ![Send an Email] icon in the toolbar. This will open your default email program (e.g. Outlook) and enter the contact's email address in the **To** field.

4 Complete the rest of your email and send it according to your default email program.

5 Once the email is sent, you will be prompted to save a copy of the email in the contact's documents.

To email a copy of a History Note to a contact:

1 Open the **Account Contacts** screen and search for the contact.

2 Click on the **History Notes** tab of the contact.

3 Start a new history note by clicking on the 🗒 icon in the toolbar.

4 Complete history note by entering the subject and details into the history note.
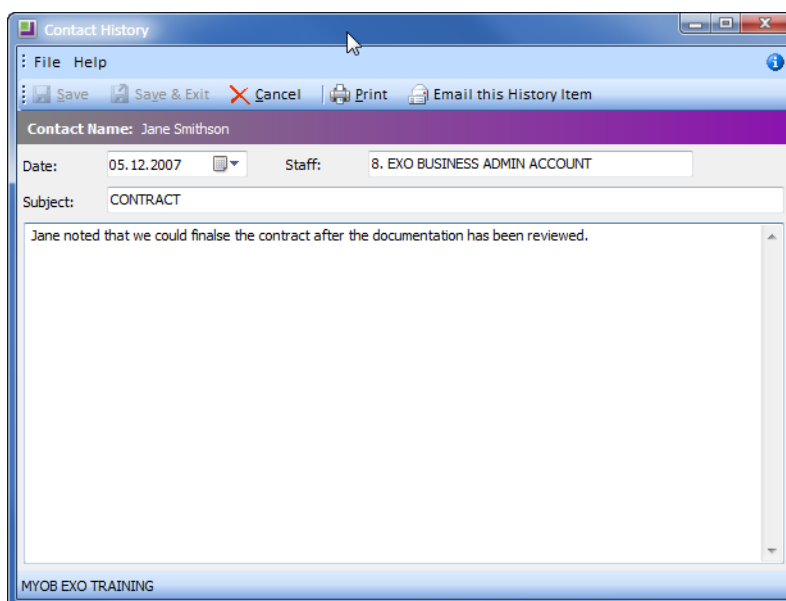
Email a History Note

5 Email the History note by clicking on ⬛ Email this History Item in the toolbar. This will open your default email program (e.g. Outlook) and enter the contact's email address in the **To** field. The subject and content of the history note will also be entered automatically into the email. Complete the rest of your email and send it according to your default email program.

6 Once the email is sent, you will be prompted to save a copy of the email in the contact's documents.

Attaching documents

Accounts > Contacts > (Contact Name) > Docs

Documents can be attached to contacts or accounts. They can be linked to the database (using less memory) or saved into the database (more memory).

To import a document:

1 Open the **Docs** tab on the **Contact** screen.

2 Click on the 🗐 icon and then on **New**.

3 Click on the 🗐 icon on the toolbar.

4 Navigate to the document you wish to import and **double-click** to open.

5 Choose how to connect the file:

- Save as a Link Only (linking is the recommended method as it uses less space within the database).

- Save file to database.

6 Enter referencing details into Document Manager (the document date, file name and source path will be automatically entered).
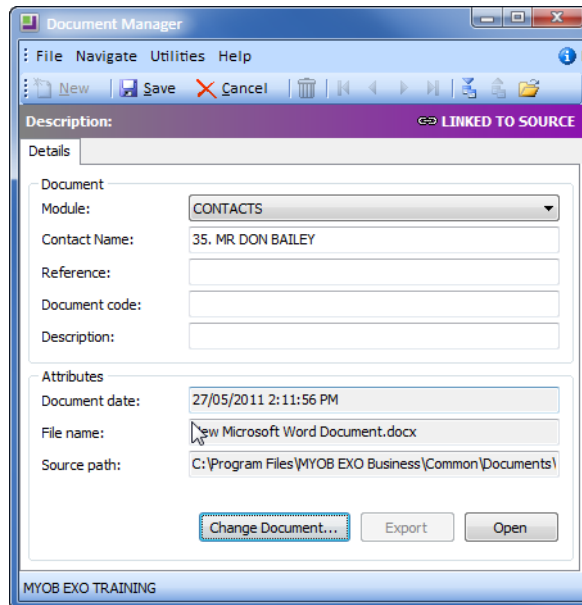
Document Manager

7 Click **Save.**

The document is now linked to the database and visible from that contact. It can be opened and edited as required.
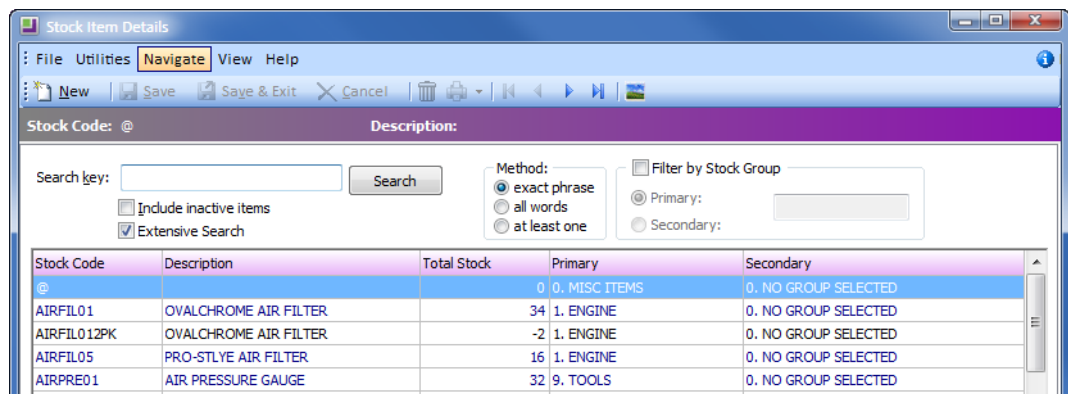
Stock

Account > Stock

Stock Items

To search for a stock item:

1 In the **Search key** field, enter the ***Stock Code*** or ***Stock item description***.

2 Click on the **Search** button.

3 Double-click on the Stock Item in the list to view the details of that stock item.

Search Options

Select the option **Include inactive items** to search inactive stock items as well.

Searching can be done for the **exact phrase** entered, **all words** entered or **at lease one** word entered.

The option **Filter by Stock Group** can also be used to filter the stock list by the **Primary** or **Secondary** stock group entered.

NOTE

Refer to the EXO Business Help for more information on the Stock Master screen.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✔
Search for a company	
Create a new company	
Search for a contact	
Create a new contact	
Assign Marketing Profiles to contacts	
Assign a contact to a company	
Synchronise contact with Microsoft Outlook	
Email contacts	
Search for a Stock Item	

Sales Budgets

4

In this unit you will learn how to create sales budgets.

By the end of this unit, you will be able to:

- ▶ Set up staff as members of a sales team
- ▶ Define Budget Periods
- ▶ Define Budget Models
- ▶ Create/Edit Sales Budgets

Sales Budgets

Sales Team Budgets are intended for clients whose businesses are focused on selling to existing clients and who therefore manage their sales staff by comparing actual sales versus budgeted sales. As EXO CRM is integrated with the rest of the EXO Business system, it can use historical sales data as input into creating budgets and tracking budgets to current sales.

Sales Team Budgets can be defined at the following levels:

- Account Group 1 and 2
- Account
- Stock Group 1 and 2
- Stock item

Sales Staff

Before Sales Team Budgets can be created, staff must be identified as a member of a sales team. This is done via the **Staff Profile Assignment** area of the EXO Business Configurator:
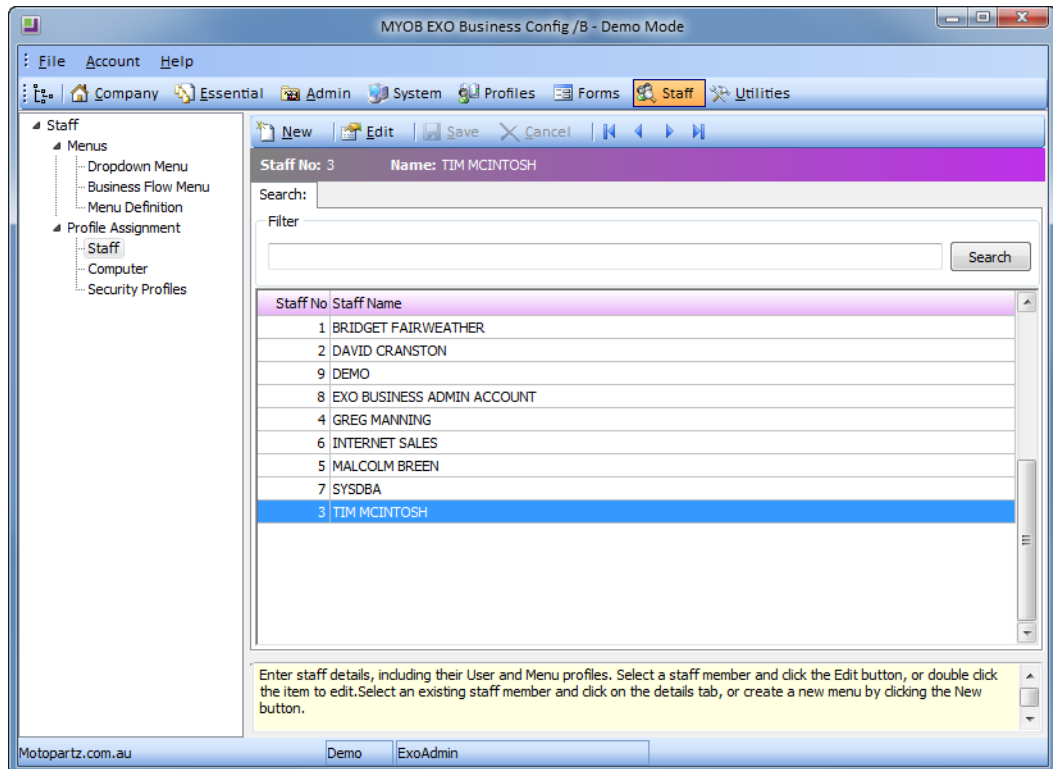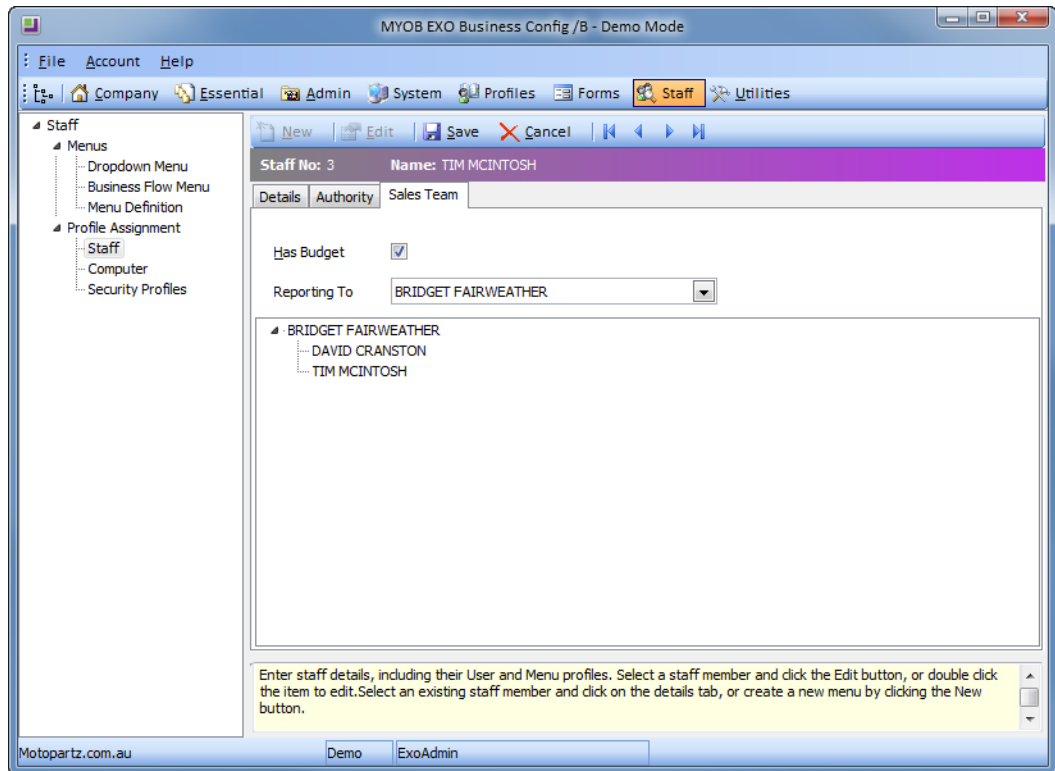

Staff Setup

NOTE

Contact your EXO Business Constultant if you do not have access to the EXO Business Configurator and require access to this area.

To set up staff as members of a Sales Team:

1 Click on a **Staff** member listed.

2 Click on the [Edit] button.

3 Click on the **Sales Team** tab.

Staff Setup - Sales Team

4 Select the option **Has Budget** to indicate that this staff member will have a sales budget.

5 By default, staff members report to themselves (i.e. they are their own manager.) From the **Reporting To** dropdown list, select the staff member (manager) this staff member reports to.
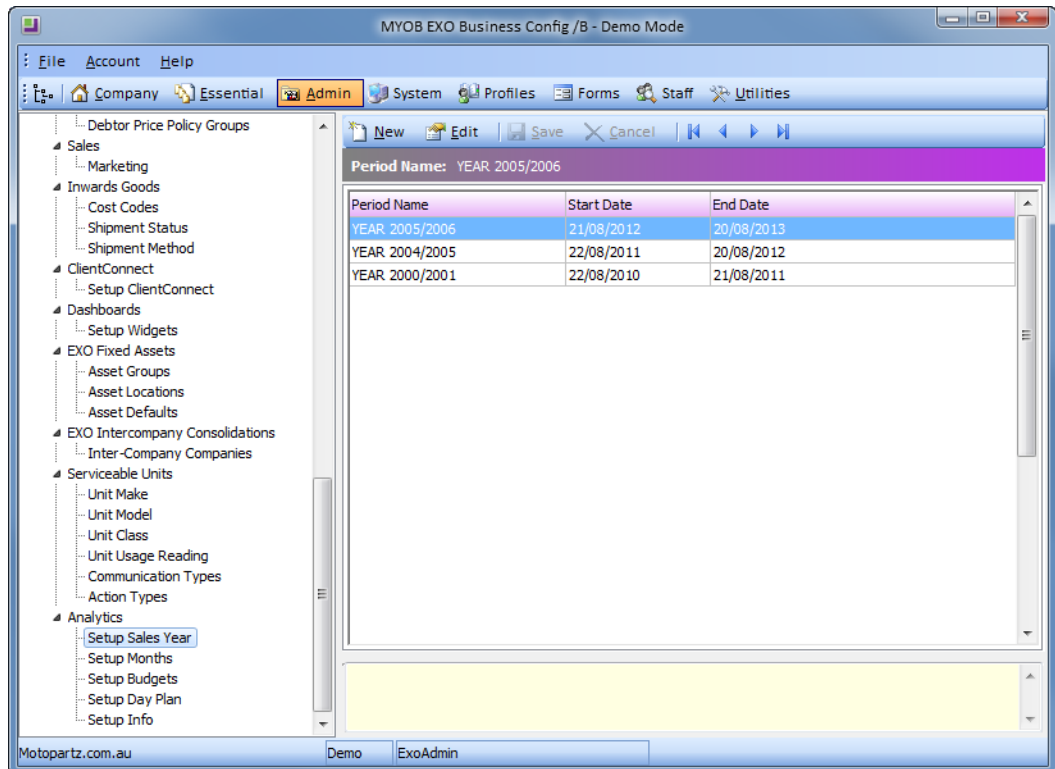
N O T E

Reporting levels are hierarchical. If Staff Member A reports to Staff Member B, and Staff Member B reports to Staff Member C, then Staff Member C will be able to see the budgets for both Staff Member A and Staff Member B.

6 Click on the [Save] button.

Budgeting Periods

Budget periods allows you to specify a specific budget for each period. Budget Periods are created via the **Analytics > Setup Sales Year** area EXO Business Configurator:

Setup Sales Year

N O T E

Contact your EXO Business Consultant if you do not have access to the EXO Business Configurator and require access to this area.
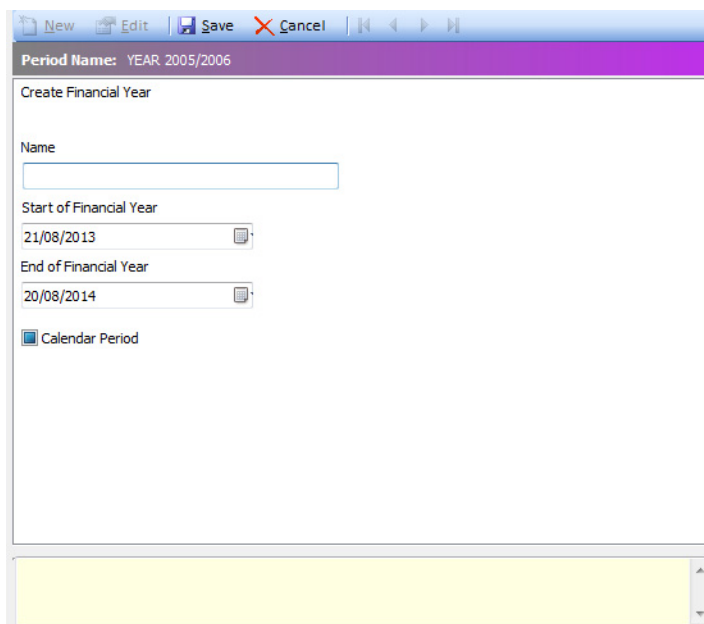
T I P

If the EXO Business Analytics module is installed and registered, these periods can also be set up and maintained via EXO Business Analytics.

To create a new Sales Year:

1 Click on the [New] button.

New Sales Year

2 Enter a *Name* for the new sales year.

3 In the **Start of Financial Year** field, enter the start date of the year.

4 In the **End of Financial Year** field, enter the end date of the year.

5 Select the option **Calendar Period** to create budget periods based on calendar months. If this option is not selected, you must specify each period in the year. This provides the flexibility to specify periods outside the norm, e.g. having 31 days in each period, regardless of the actual calendar days in the period.

6 Click on the [Save] button.

After creating the Sales Years, the months within each year must be created.

Months are created via the **Analytics > Setup Months** area EXO Business Configurator:

Setup Months

NOTE

Contact your EXO Business Constultant if you do not have access to the EXO Business Configurator and require access to this area.
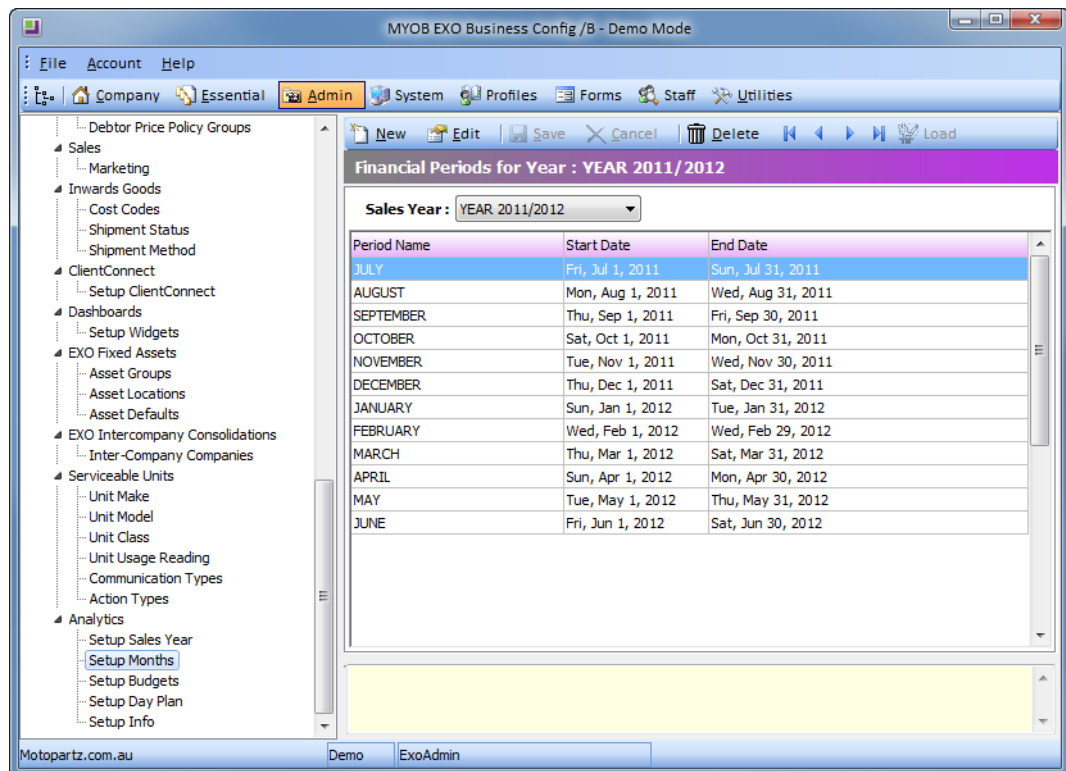
TIP

If the EXO Business Analytics module is installed and registered, these periods can also be set up and maintained via EXO Business Analytics.

To create months:

1 From the **Sales Year** dropdown list, select the sales year you want to create months for.

2 Click on the [Load] button. This will load the calendar months for the selected sales year.

The months (periods) can be changed once they are created.

To edit the months (periods):

1   Select the period you wish to modify.

2   Click on the [Edit] button.
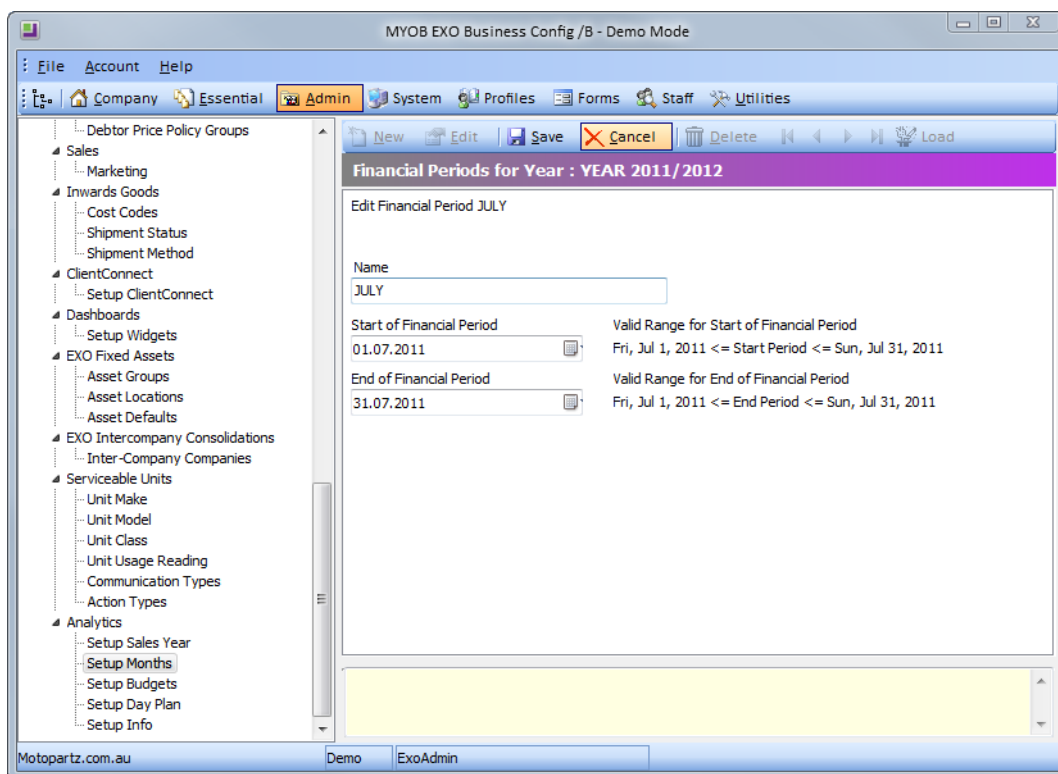
Edit periods

3   Make the necessary changes to the **Name**, **Start of Financial Period** and **End of Financial Period** fields.

4   Click on the [Save] button.

Budget Models

The final step before creating Sales Budgets, is to create Budget Models. Budget Models define the levels to budget at and the sales period to budget over.

To create a Budget Model:

1 From the **Setup** menu, select **Setup Sales-Team Budgets**.

2 A list of existing budget models will be displayed.
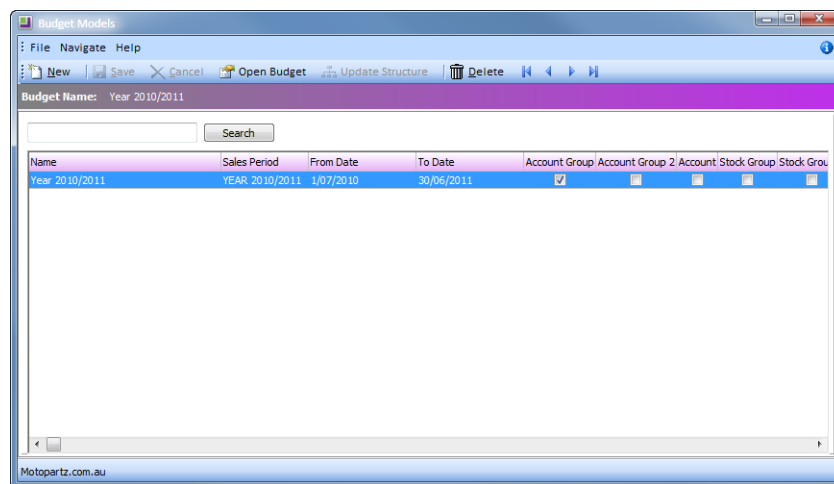
Budget Models

3 Click on the ☐ New button.

Creating a new budget model

4 In the **Budget Name** field, enter a name for this budget to identify it from other budgets models.

5 From the **Sales Year** dropdown list, select the year this budget relates to.

6 Select the option **Active** to make this budget model available for use.

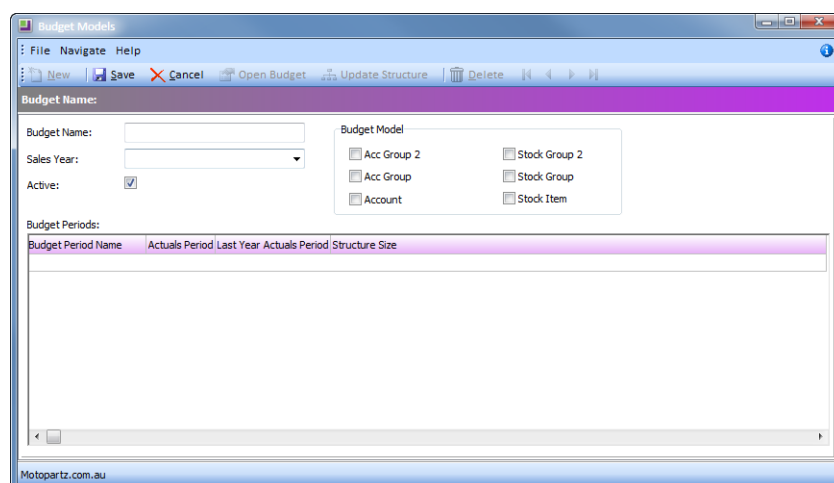**7** From the **Budget Model** section, select one or more of the following options to specify the level of budgeting that will be used:
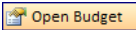
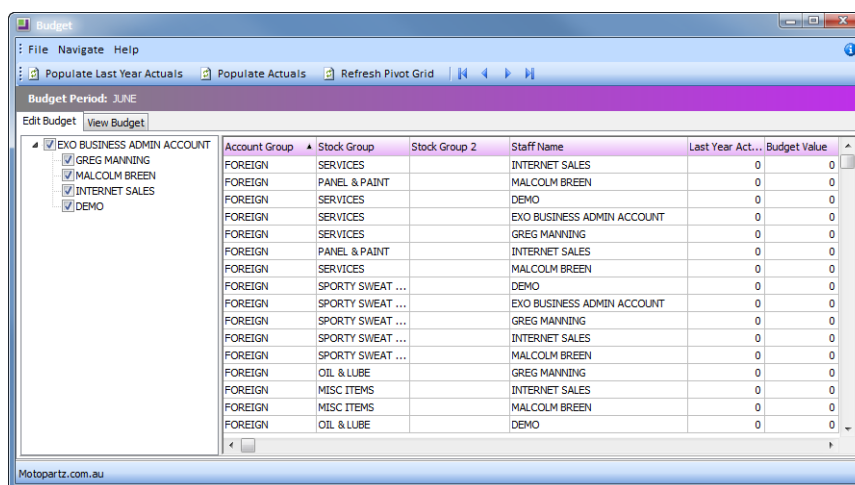| Option	Description
Acc Group 2	Select this option to create a budget based on the Account Group 2 selected in the Debtors' master record. The same budget will apply to debtors with the same Account Group 2.
Account Group	Select this option to create a budget based on the Account Group selected in the Debtors' master record. The same budget will apply to debtors with the same Account Group.
Account	Select this option to create an individual budget for each Debtor account.
Stock Group 2	Select this option to create a budget based on the Stock Group 2 selected in the Stock master record. The same budget will apply to stock items with the same Stock Group 2.
Stock Group	Select this option to create a budget based on the Stock Group selected in the Stock master record. The same budget will apply to stock items with the same Stock Group.
Stock Item	Select this option to create an individual budget for each Stock item.

8 Click on the [Save] button.

Sales Budgets

Sales Budgets are automatically created using the Budget Models.

To edit a Sales Budget:

1 From the **Setup** menu, select **Setup Sales-Team Budgets**.

2 Select the appropriate budget model and click on the [Open Budget] button.

3 Click on the **Edit Budget** tab.

Editing Sales Budgets

4 Unselect the staff whose budget you do not wish to view/edit by clicking on the checkbox next to their name.

5 Click on the [Populate Last Year Actuals] button to populate the **Last year Actual** column with data available in the EXO Business database.

6 Enter the appropriate *Budget Value* for each item in the budget.
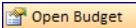
TIP

The data can be copied to Excel using the standard **Copy to clipboard** functionality available on ExoGrids. The manipulated data can be pasted back into the grid using the **Paste from clipboard** funcionality on ExoGrids. The **SEQNO** must remain the first column to successfully paste the information into the grid.
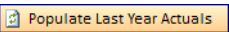
To view a Sales Budget:

1 From the **Setup** menu, select **Setup Sales-Team Budgets**.

2 Select the appropriate budget model and click on the [Open Budget] button.

3 Click on the **View Budget** tab.
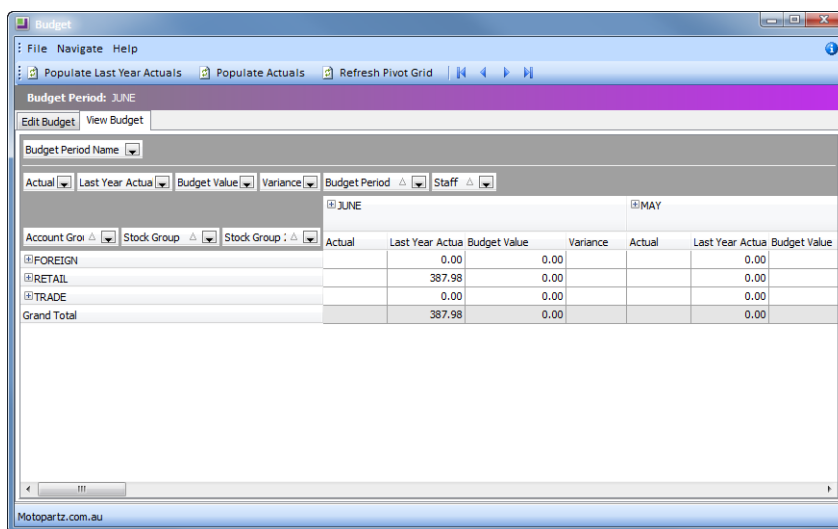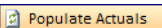
Viewing sales budgets

N O T E
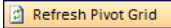
The Budget tab in the Sales Budgets is equivalent to the Sales Team Budget widget that is available.

4 Click on the [Populate Actuals] button to populate the **Actual** column with data available in the EXO Business database.

5 Use the filters available to filter the information shown on the grid.

T I P

After making changed to the budget values, click on the [Refresh Pivot Grid] button to update the grid with the changes.

Sales-Team Budget View

The Sales-Team Budget widget provides team members with access to their budget. This allows them to keep track of their budget.

Sales Team Budget Widget - Sample pivot table

1 From the **Budget Name** dropdown list, select the budget you wish to view.

2 From the **Budget for Staff** dropdown list, select the sales staff to include in the budget.

3 Click on the **Refresh** button to update the values in the grid based on your selection.

The information displayed in the pivot table can be customised.

To customise the pivot table:

1 Right-click on the field (grey) area, and select **Show Field List** from the pop-up menu.
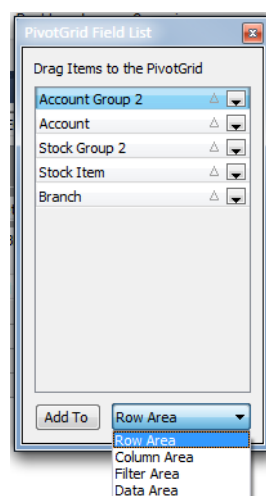
PivotGrid Field List

2   Click on the item to add to the pivot table.

3   From the **Area** dropdown list, select one of the following options:

Row Area	The selected item will be added the pivot table as rows.
Column Area	The selected item will be added to the pivot table as a column.
Filter Area	The data in the pivot table can be filtered using the selected item.
Data Area	Data for the selected item will be displayed in the pivot table.

4   Click on the **Add To** button to add the selected item to the pivot table.

The order of the columns in the pivot table can be changed once they are added to the table.

To change the column order:

1   Right-click on the filters dropdown list of the column you wish to move.
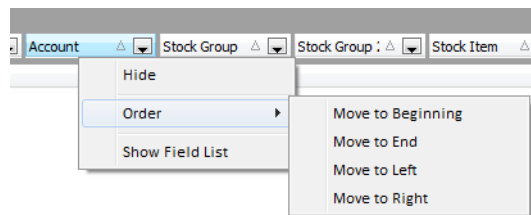
Change column order

2   In the pop-up menu, select **Order.**

3   From the list of options, select the direction in which the column should move.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✔
Set up sales team members	
Set up Budgeting Periods	
Set up Budget Models	
Set up Sales Budgets	

Activities

In this unit you will learn how to create appointments and tasks.

By the end of this unit, you will be able to:

▶ Create new activities

▶ Synchronise activities with Microsoft Outlook

Activities

Accounts > Activities

The Activity Search widget is a useful tool in EXO Business that enables you to create activities (tasks or appointments) and assign them either to yourself or another staff member.

Activities can be linked to any company (debtor, creditor, non account), contact or opportunity. When an activity has been entered for a company or contact, it will appear in the activities tab of that entity.

Activities operate in a manner similar to Microsoft Outlook with tasks and appointments treated similarly to tasks and appointments in Microsoft Outlook. Tasks and appointments can be scheduled, set as recurring, and categorised in a way that suits you and your business.

Activities can also be synchronised with Microsoft Outlook. When synchronising Activities, the distinction between Tasks and Appointments is preserved, e.g. Activities that exist as Tasks in EXO Business will appear as Tasks in Outlook after Activities are synchronised.

The Activities view displays all Tasks and Appointments in the EXO Business system. Activities can be displayed in a simple list, or on a calendar interface.

T I P

The Activities view is available as a separate window and as a Dashboard widget that can be added to the EXO CRM interface.

Set up Calendar

Events are presented in a calendar style view that can be customised to suit your own requirements. You can vary the increments in which you view the time and can have up to two time zones appearing on your calendar.

You can set up various viewing options in the Setup Scheduler screen.

To set up the calendar:

1 Select **Setup Calendar** from the **Tools** menu.
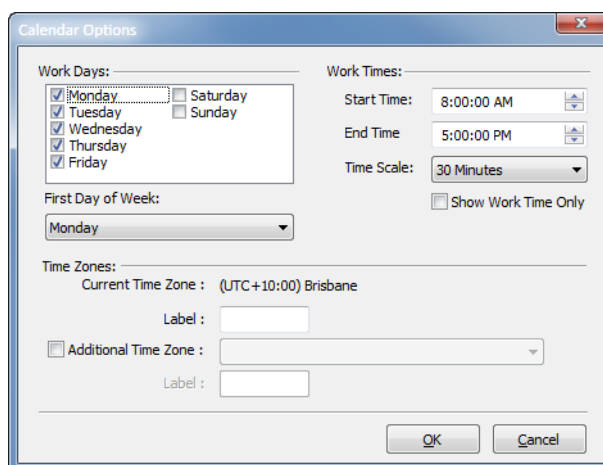
Set up Task Scheduler

2 Setup the appropriate options such as:

- work days and work times to calculate task durations
- time scale in which to view your tasks and calendar (e.g. half an hour, 15 minutes, etc).
- first day of the working week
- an additional time zone to appear on your calendar, if required.

3 Click **Ok**.

Review Activities

TIP

Individual activities can be reviewed in the activities tab of any entity (contact, creditor, debtor, non account, opportunity) that they are related to.

List View

Selecting the **List View** option (found under the Options button in the Activities Search widget) displays all Tasks and Appointments in a simple list.

|	Subject	Type	Status	Company Name	Contact Name
☐ ↓	Meeting with James Barry	Debtor	Completed	JAMES BARRY	
☐ ❗	Meeting	Proposal	Not Started	TASHI MOTORS	
☐	Presentation	New Business	Deferred		
☐	Followup	New Business	Waiting On Some…		
☐	Proposal for Tashi Motors	To Do	Not Started	TASHI MOTORS	

Activities - List View

For easy idenfication, activities are colour-coded:

- Green background = Tasks

- No colour background = Appointments

To edit an activity:

1   Double-click on the activity.

You can select a pre-defined view from the **Views** dropdown list to apply a filter:

View	Description
My Activities	Lists all the activities where the current user is the creator of the activity.
Open Activities	Lists all the activies with a status other than **Completed**.
Closed Activities	Lists all the activities with a status of **Completed**.
Overdue Activities	Lists all activities with an **End Date** prior to today.
Today's Activities	Lists all activities with an **End Date** of today.
Tomorrow's Activities	Lists all activities with an **End Date** of tomorrow.
Custom Views	Custom views will be listed next. Select the option **Custom Views** to create a customised view for the current user.

To create a custom view:

1   From the **Views** dropdown list, select **Custom View**.

2   A list of custom views will be displayed.

3   To edit a custom view, select the view in the list and click on the Edit button.

4 To create a new custom view, click on the [New] button.
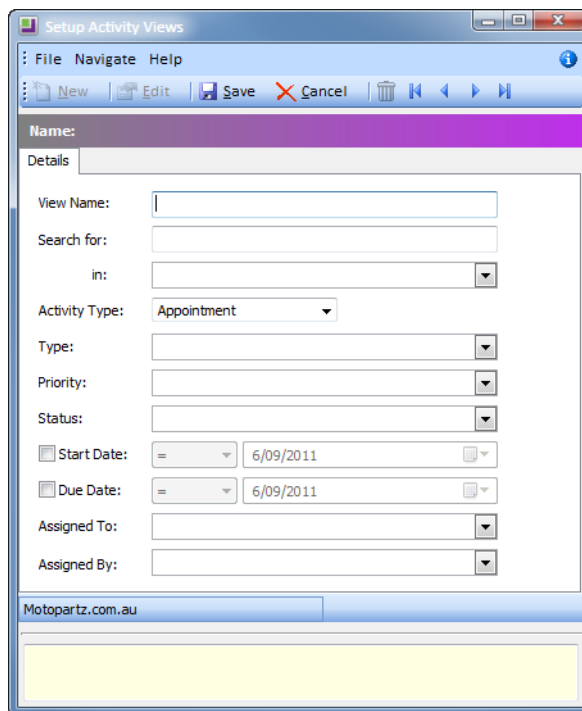
Activies - Create new custom view

5 Enter a **View Name**.

6 In the **Search for** field, enter the search criteria for this view.

7 From the **in** dropdown list, the area in the activity to search in.

8 From the **Activity Type** dropdown list, select whether the search should be conducting in *Appointments* only, *Tasks* only or *All* activities.

9 From the **Type** dropdown list, select the type of activity to include in the search. The options displayed on this list will depend on the selection made in the **Activity Type** dropdown list.

10 From the **Priority** drop down list, select the priority assigned to the activity.

11 From the **Status** dropdown list, select the status assigned to the activity.

12 To apply a specific date range to the view, select the option for the **Start Date** and/or **End Date**.

**13** Select the operator to apply to the date entered:

Operator	Description
=	The **Start Date** or **End Date** is the same as the date specified.
<>	The **Start Date** or **End Date** is prior to or after the date specified.
<	The **Start Date** or **End Date** is prior to the date specified.
<=	The **Start Date** or **End Date** is prior to or the same as the date specified.
>	The **Start Date** or **End Date** is after the date specified.
=>	The **Start Date** or **End Date** is the same as or after the date specified.
Between	The **Start Date** or **End Date** is the between as the dates specified.

14 From the **Assigned To** dropdown list, select the user the activity is assigned to.

15 From the **Assigned By** dropdown list, select the user created the activity.

16 Click on the Save button.

Calendar View

Selecting the **Calendar View** option (found under the Options button in the Activities widget) displays Tasks and Appointments in a calendar view similar to the Task Scheduler in the EXO Business core module.

You can select a pre-defined view from the **Views** dropdown list to apply a filter:

Activity Views - Days

Activity Views - Year

Activity Views - Time Grid

Activity Views - Week
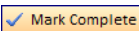
Activity Views - Month

Appointments appear on the calendar, while Tasks are listed in the section below.

To edit an activity:

1   Double-click on the activity.

Right-clicking on an activity provides the following options:

Option	Description
Postpone	Delay the activity by the specified amount of time.
Mark as completed	Change the **Status** of the selected activity to ***Completed***. This can also be achieved by editing the activity and clicking on the ✓ Mark Complete button on the toolbar.
Selected Items > Export to Outlook	Synchronise the selected activities with Microsoft Outlook.

Creating new activities

To create a new activity:

1 Click on the **New** button.

New Task Screen

2 From the **Activity Type** dropdown list, select either *Appointment* or *Task*.

3 Select the **Type** of event (estimate, new business, to do, etc). This list can be edited by selecting the option *Edit List*.

4 Select the option *Sync with Outlook* to synchronise this event with the corresponding type in Outlook.

5 Enter the *Subject* details - this will appear in the task scheduler window.

6 To link the task to a company, enter the *Company*.

7 To link the task to a contact, enter the *Contact*.

N O T E

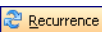If EXO CRM is installed and licensed, fields will be available to track the **Opportunity** and **Campaign Wave** that generated this Activity.

8 Enter a **Label** as required (*Important*, *Personal*, *Must Attend*, etc). These options cannot be edited.

9   From the **Status** dropdown list, select the appropriate status for the activity (***In Progress***, ***Completed***, ***Deferred***, etc). This list can be edited by selecting the option ***Edit List***. If the **% Completed** is set a value between 0.00% and 100.00%, this field will be automatically set to ***In Progress***.

10 To assign the activity to another staff member, select their name from the **Assigned To** dropdown. The activity will appear in their own list the next time their screen refreshes.

11 Select a **Priority** of ***Low***, ***Medium*** or ***High***. These options cannot be changed.

12 If the **Activity Type** is set to *Task*, a **% Complete** field will be available to track the progress of the task. Depending on the **Status**, this field will be automatically set to one of the following:

Status	% Complete
Not Started	0.00%
Completed	100.00%
Any other option	25.00%

13 A **Reminder** can be set to provide an alarm at the designated time prior to the scheduled event start.

14 Amend the **Start** and **End Time/Date** as required, or click on the ⟳ Recurrence icon in the toolbar to set up a recurring evejnt. (The following shows a regular event from 8.30 - 9.00 every Wednesday for 10 weeks.)
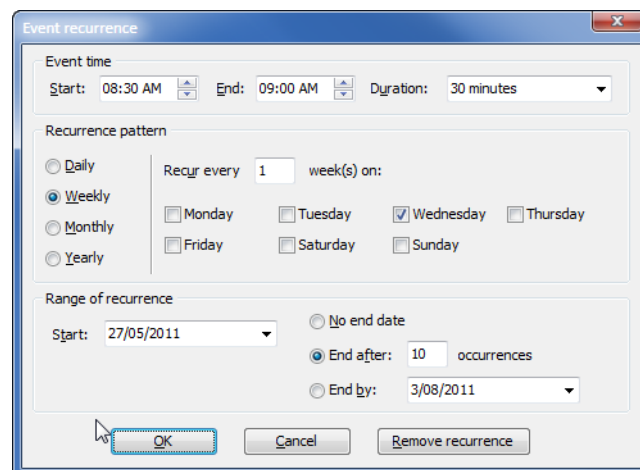
Task Recurrence Screen

15 Add **Notes** to the activity as required in the lower panel.

16 Click **Save and close** to save the activity.

The Calendar view offers several options for creating new activities:

- Clicking on the **New** button.

- Double-clicking on a time slot on the calendar to create an activity at that time.

- Right-clicking on a time slot on the calendar to create an activity at that time.

T I P

The right-click menu also contains options to create an all-day activity or a recurring activity.

- Double-clicking on a blank area of the Task list.

Synchronising activities with Outlook

EXO CRM allows activities (Tasks and Appointments) to be synchronised between MYOB EXO Business and Microsoft Outlook. When activities are synchronised, the following updates occur:

- Any new activities in EXO Business are exported to Outlook.

- Any new activities in Outlook are imported to EXO Business.

- Any existing activities that have been modified in either system are updated in the other system.

In all cases, the distinction between Tasks an Appointments is preserved, e.g. activities that exist as Tasks in EXO Business will appear as Tasks in Outlook after activities are synchronised.

I M P O R T A N T

When updating existing activities, the synchronisation process uses the most recently updated activity as the "master" and copies this to the other system. This means that if the same activity is edited in both systems before activities are synchronised, only the most recent changes will be saved.
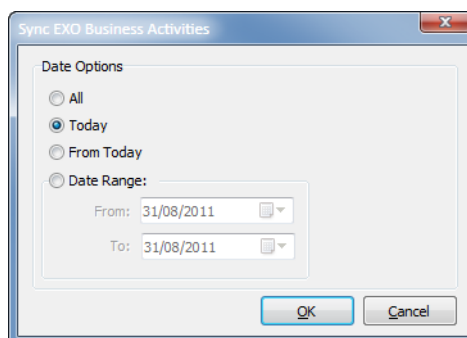
T I P

Separate **Import from Outlook** and **Export to Outlook** functions are also available to perform a one-way synchronisation of Activities in either direction.

To synchronise all activities in a specified date range:

1 Click the **Tools** button on the toolbar and select **Sync Activities with Outlook**.

2 The following window opens:

Sychronise Activities with Microsoft Outlook

3 Specify which activities to synchronise by selecting one of the following **Date** options:

Date Option	Description
All	All the activities will be synchronised with Outlook.
Today	Only today's activities will be synchronised with Outlook.
From Today	Only activities from today onwards will be synchronised with Outlook.
Date Range	Enter a specific date range of activities to synchronise with Outlook.

4 Click **OK**.

To synchronise specific activities in the List View:

1 Click on the selection boxes of all activities you want to synchronise.

2 Right-click anywhere on the list and select **Selected Items** > **Export to Outlook** from the pop-up menu.

Functions are also available to perform a one-way synchronisation of activities:

- Click the **Tools** button and select **Import Activities from Outlook** to import activities from Outlook.

- Click the **Tools** button and select **Export Activities to Outlook** to export activities to Outlook.

Respond to reminders

If a reminder has been set, at the designated time you will receive a reminder of the activity via an alarm icon (🔔) on the tast bar of your windows screen. Double click on the alarm icon to bring up the reminder window.
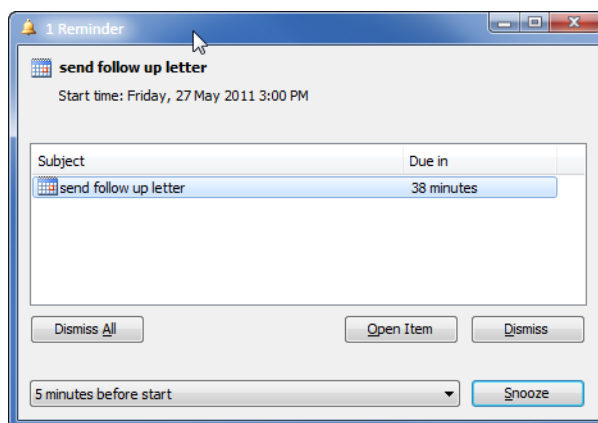
Task Reminder Screen

You can respond in one of four ways:

- **Dismiss All** will dismiss all reminders in the reminder screen.

- **Open Item** will open the task for review and editing.

- **Dismiss** will dismiss the currently selected reminder.

- **Snooze** will enable you to ''snooze'' and be reminded again in the specified timeframe (10 minutes by default).

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✔
Set up calendar defaults	
View tha activities as a list or calendar	
Create a new activity	
Synchronise activities with Microsoft Outlook	

Opportunities

In this unit you will learn how to create and manage Opportunities.

By the end of this unit, you will be able to:

▶ Create a new Opportunity

▶ Add a quote to an Opportunity

▶ Create quote options

▶ Convert an Opportunity into a Sales Order Quote, Sales Order or Job

Opportunities

Accounts > Opportunities

Opportunities represent transactions that do not yet have a financial dimension; they are a stage before the generation of a quote. Once complete, an Opportunity can be converted to a quote.

Opportunities

T I P

EXO CRM includes an Opportunities Search view, which is available as a Dashboard widget or a standalone window.

Opportunities can be associated with Companies (Debtors, Creditors, Non Accounts) and/or Contacts. New Opportunities can be created from the Opportunities Search window or directly from the Debtors, Creditors, Non Accounts and Contacts windows.
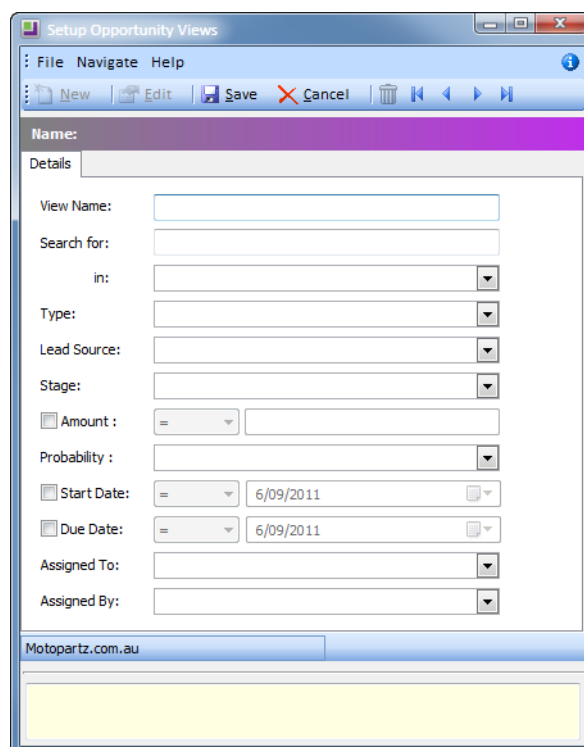
N O T E

An Opportunity tab and/or toolbar buttons will be available on the Debtors, Creditors, Non Accounts and Contacts screens in the EXO Business core module if EXO CRM features have been added to the core module's menus.

The Opportunities view in EXO CRM lists all Opportunities in the system. Using the **View** dropdown list, the Opportunities listed can be filtered/sorted:

View	Description
My Opportunities	Only displays opportunies assigned to the current user.
Most Urgent Opportunities	Displays opportunities in descending order by Due Date.
Most Recent Opportunities	Displayes opportunities in descending order by Start Date.
Custom Views	Any custom views will be listed next. Select the option **Custom Views** to create a new custom view.

To create a custom view:

1 From the **Views** dropdown list, select **Custom View**s.

2 A list of custom views will be displayed.

3 To edit a custom view, select the view in the list and click on the 🖼 Edit button.

4 To create a new custom view, click on the 🗋 New button.

Opportunities - Create new custom view

5 Enter a **View Name**.

6 In the **Search for** field, enter the search criteria for this view.

7 From the **in** dropdown list, the area in the activity to search in.

8 From the **Type** dropdown list, select the type of opportunity to include in the search.

9 From the **Lead source** drop down list, select the lead source assigned to the opportunity.

10 From the **Stage** dropdown list, select the stage assigned to the opportunity.

11 To include an amount in the criteria, click on the **Amount** option.

12 Select the operator to apply to the amount entered:

Operator	Description
=	The Opportunity amount is the same as the Amount specified.
<>	The Opportunity amount is less than or greater than the **Amount** specified.
<	The Opportunity amount is less than the **Amount** specified.
<=	The Opportunity amount is less than or equal to the **Amount** specified.
>	The Opportunity amount is greater than the **Amount** specified.
=>	The Opportunity amount is greater than or equal to the **Amount** specified.
Between	The Opportunity amount is between the **Amounts** specified.

13 From the **Probably** dropdown list, select the probability entered against the Opportunity.

14 To apply a specific date range to the view, select the options for the **Start Date** and/or **End Date**.

15 Select the operator to apply to the date entered:

Operator	Description
=	The **Start Date** or **End Date** is the same as the date specified.
<>	The **Start Date** or **End Date** is prior to or after the date specified.
<	The **Start Date** or **End Date** is prior to the date specified.
<=	The **Start Date** or **End Date** is prior to or the same as the date specified.
>	The **Start Date** or **End Date** is after the date specified.
=>	The **Start Date** or **End Date** is the same as or after the date specified.
Between	The **Start Date** or **End Date** is the between as the dates specified.

16 From the **Assigned To** dropdown list, select the user the Opportunity is assigned to.
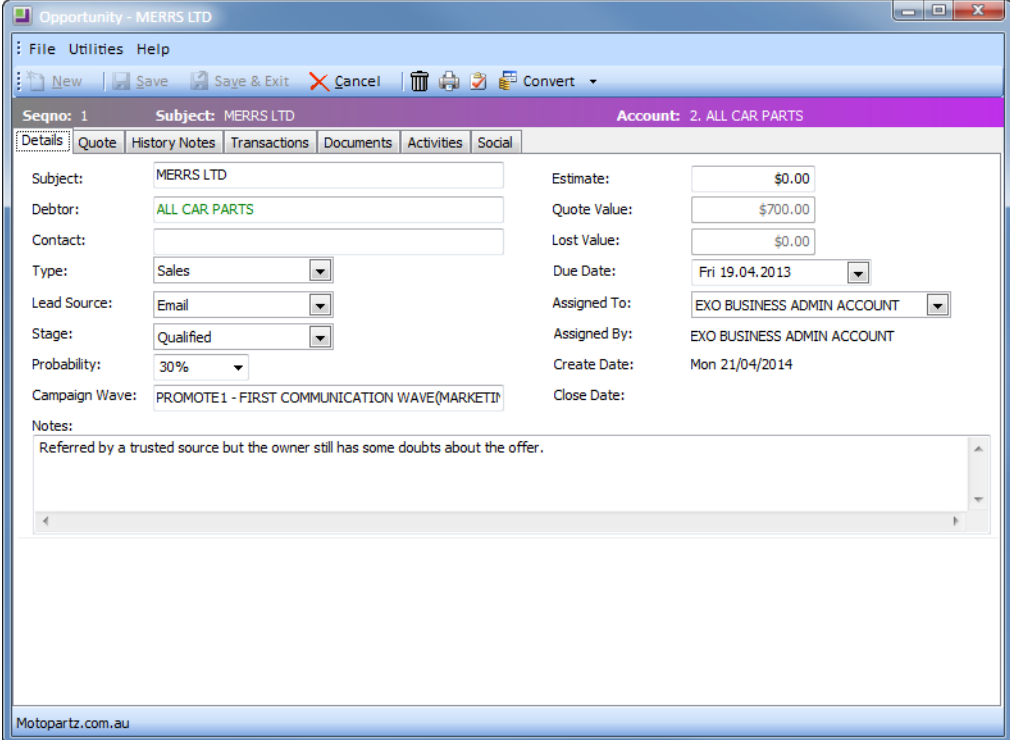
17 From the **Assigned By** dropdown list, select the user that created the Opportunity.
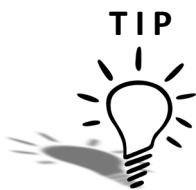
18 Click on the button.

Creating Opportunities

To create a new Opportunity:

1 Click the [New] button on the toolbar.

Opportunity screen

TIP

To create an opportunity from a Debtor, Creditor, Non Account or Contact record, select the Opportunities tab and click on the [icon] button on the toolbar.

2 Enter a **Subject** that describes the Opportunity.

3 Enter the name of the company account that the opportunity relates to. The caption for this field is **Company** to begin with. Once an account is selected, the label changes to reflect the kind of account that was selected. The colour of the text also indicates the kind of company:

- Debtors are green

- Creditors are red

- Non Accounts are black.

IMPORTANT

Only Opportunities associated with a Debtor account can be converted to a Sales Order Quote or Sales Order.

4 Enter the name of the **Contact** that the opportunity relates to.

NOTE

If the Opportunity is being created for a Company, this field will be populated automatically.

TIP

When searching for a Contact, only Contacts associated with the selected company are displayed. Select the Search on all Contacts option to list all Contacts in the database. The selected Contact will automatically be associated with the company.

5 Select a **Type** for the Opportunity, or select **Edit List...** to create a new type.

6 Select a **Lead Source** for the Opportunity, or select **Edit List...** to create a new source.

7 Select a **Stage** for the Opportunity, or select **Edit List...** to create a new stage.

8 Specify the percentage **Probability** of the Opportunity converting to a sale.

9 Enter the **Campaign Wave** that generated this Opportunity.

TIP

Type *?* and press TAB to display a list of Campaign Waves.

10 Enter the **Estimated Value** of the Opportunity.

NOTE

Any amount can be entered, which means that this amount can differ from the total on the Quote tab.

11 The **Quote Value** field will display the value of the quote based on the information on the Quote tab.

12 If the Opportunity Stage is changed to Lost, the **Lost Value** field will display the value of the opportunity.

13 In the **Due Date** field, enter the date when this Opportunity is expected to convert to a sale..

14 From the **Assigned To** dropdown list, select the EXO Business user that is responsible for the Opportunity.

---

15 The read-only **Assigned By** field is automatically populated with the name of the EXO Business user who created the Opportunity.

16 The read-only **Create Date** is automatically populated with the date that the Opportunity was created on.

17 The read-only **Close Date** field is blank to begin with and is automatically populated with the current date when the Opportunity is closed (i.e. when its **Stage** is set to *Closed Won* or *Closed Lost*).

18 Enter any relevant **Notes** for the opportunity.

The lower section of the Details tab is blank to provide room for Extra Fields.

Additional Tabs

In addition to the Details tab, the Opportunities window includes the following common tabs:

- History Notes to record formal communications with the company, e.g. notes of a telephone conversation regarding the opportunity.

- Transactions to view transactions (Sales Order Quotes, Sales Orders, Invoices, Payments, Credits) associated with the Opportunity.

- Documents to add/view documents associated with this opportunity, including emails sent to the associated contact.

- Activities to add/view tasks and/or appointments associated with this opportunity.

A Quote tab is also available for adding quote information against the Opportunity.

Opportunity Quotes

To enter a quote for an Opportunity:

1 Click on the **Quote** tab.
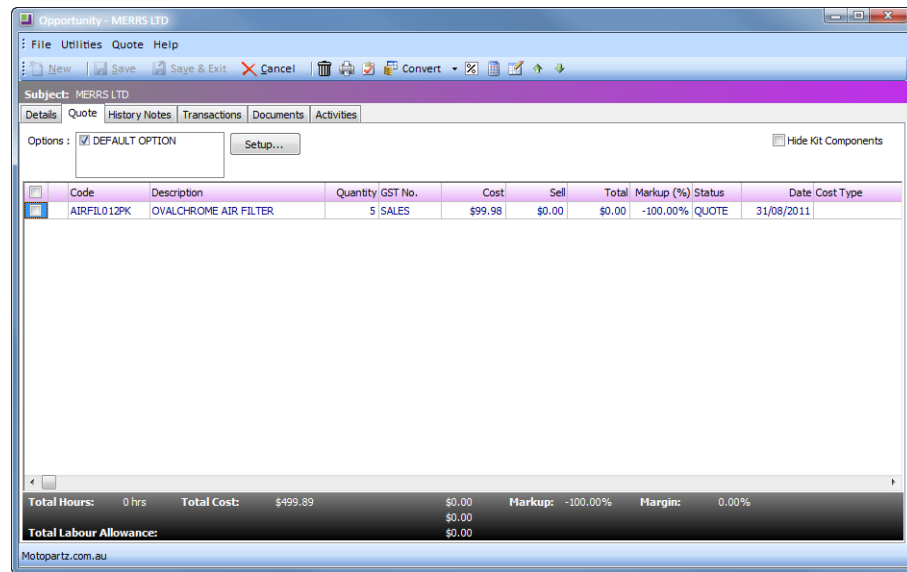

Opportunity Quote tab

Field	Description
Group Select	The first column contains a checkbox that allows you to select the line as part of a group of lines to perform actions on using the right-click menu.
Narrative	The second column displays the ▤ icon if a narrative has been added to the line. Right-click on this field and select **Add a Narrative** to add a new narrative to a line. A narrative can only be added/edited after the line has been saved, using **Save** or **Save & Exit**.
Code	A product code. Type **?** and press **TAB** to displays a list of products. Double-click on the required stock item. Type **.** (full stop) and press **TAB** for a list of Bills of Material.
Description	A product description. This uses the description of the product as entered in the main MYOB EXO Business stock record. It can be overwritten here.
Qty	The quantity to be supplied. It is 1 by default.

GST No	Select the GST number from the predefined list of GST entries. This automatically sets the GST rate.
Cost	The cost of the product. This uses the cost as entered in the stock records but can be overwritten.
Sell	The selling price of the product. This uses the selling price, as attached to the customer. It can be overwritten.
Total	Automatically calculated. It cannot be directly overridden.
Markup %	This value is automatically calculated and can be overwritten. Enter the percentage amount of the new markup, ignoring the % sign, e.g. 112.5 for 112.5%.
Status	The status of this line.
Date	The date of transaction being entered.
Cost Type	Enter a Cost Type (*'Setting Job Types'* on page 14), if types are used. Type **?** and press **TAB** to select from the cost types available. **Note:** This column is only applicable to Opportunities that will be convert to Job Costing Jobs.
Cost Group	Enter a Cost Group (*'Setting Cost Groups'* on page 20), if groups are used. Type **?** and press **TAB** to select from cost groups available. Cost group will auto populate if the cost type is entered first but can be overridden. **Note:** This column is only applicable to Opportunities that will be convert to Job Costing Jobs.
Disc (%)	Discount applied to the selling price of this line.
Gross Margin %	Automatically calculated. It cannot be directly overridden.
Supplier Name	The preferred supplier for any lines that you will need to "order in".
From Location	The preferred location to draw stock from if this quote becomes a job.
Kit No	The preferred location to draw stock from if this quote becomes a job.
Quote Options	When a kit is added to the job, the lines of the kit are given a kit incidence number that is used to hold the lines of the kit together. Lines that are not part of a kit have the value -1.
Analysis Codes	This works in conjunction with the Quote Options defined in the area above the grid. These allow the quote to be split onto sections (e.g. optional upgrades). One quote option is created by default ('Default Option')

Total Labour Allowance	This allows a unit labour allowance to be specified associated with a product. Labour allowances are distinct from an actual 'time' lookup item within the grid and act as a guide. Labour allowance is optionally keyed in the labour allowance column and can also be defaulted from an extra field on the Stock Item. This is a "per unit" labour value so it is multiplied by quantity. The sum of labour allowances is also shown at the bottom of the screen. **Total Labour Allowance:** 1 hrs

As this tab is an ExoGrid, there are more columns available by right clicking on the column header and selecting **Select Visible Columns**. The columns shown above are shown by default.

Additional columns that may be selected include:

Field	Description
Sell Inc GST	Sell price including GST.
GST	GST value per unit.
GST Total	Total line value of GST.
Total Inc GST	Line total including GST.
GST Rate	The rate of GST.
Length, Width & Depth	Allow additional factors to apply to quantity. These default to 1.
Total Qty	Used with Length, Width and Breadth, it gives the effective quantity when these factors are multiplied by quantity.
Line Type	This is normally zero but this can indicate: 1= Kit header 2=Component
Kit Code	Normally blank but this can contain the BOM code of a kit
Line #	Line number. This can be edited and used with the ExoGrid sorting capabilities (or Clarity reporting) to re-sequence the lines from their original entry sequence.
Analysis codes 1 & 2	Can be used as another coding for posting to the General Ledger.
Showline	Contains a Y or N to indicate if the line should appear on an invoice. This applies to kit component lines where the component lines may be hidden (set on BOM header)
Spread	Defaults to Y but can be changed to N. Indicates if the line will be taken into account when using the spread function (⬚) to alter the quote total.

2 Click **Save**, **Save & Exit**, or press **CTRL + S** to commit the changes.

3 Clicking **Cancel** cancels changes and returns to the search screen.

T I P

When adding lines, the checkboxes for those lines will not appear until the quote is saved.

Quote Functions

The functions that are available to be performed on quote lines are detailed below.

Toolbar Options

Re-sorting lines Quote lines can be moved up and down in the order by selecting the line then using the ⬆ or ⬇ buttons on the toolbar. This will be saved and re-presented in this order once the order is saved.

Change quote total The ▦ button can be used to alter the quoted values of lines to sum to a specified total. The system prompts for the new total.
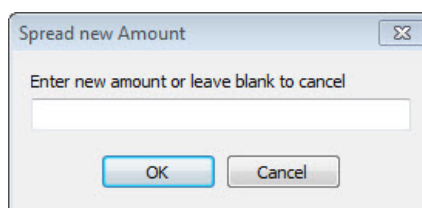
Spread New Amount
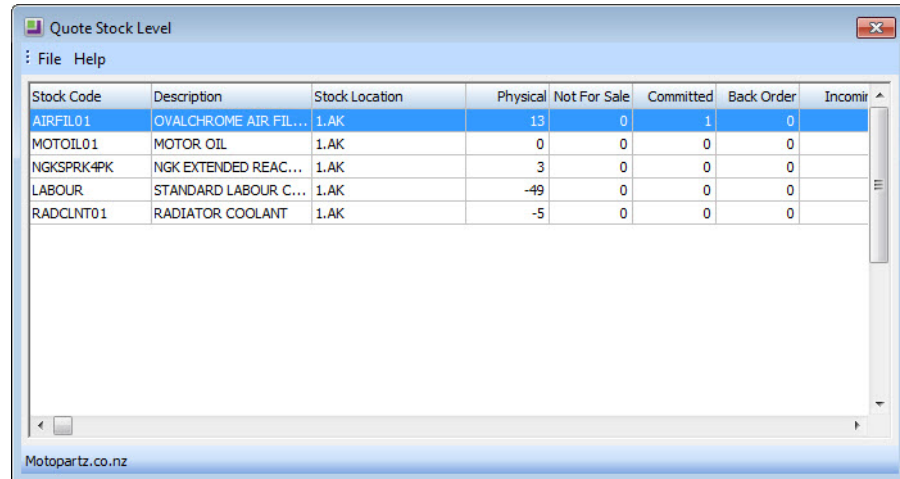
Lines are proportionally altered by factoring them on the basis of old total versus new total (the difference is spread according to the lines' original value). If you have some lines which you do not wish to be altered by this process then set the value in their **Spread** column to *N*.

Check for Price Changes

Click on the ▦ button to check quoted prices against the latest cost and selling prices from the stock ledger.

Check Stock Level
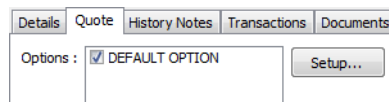
The current levels of stock relating to the requirements of a quotation can be checked before it is activated as a job by clicking the 🖉 button. .

*Quote Stock Level*

Quote Options

Opportunity Quote Options

By default, all lines of an opportunity belong to the DEFAULT OPTION, which is automatically created for each opportunity. When quoting, it may also be preferable to include additional lines for optional extras or upgrades to the default being quoted.

To create or maintain one or more additional Options:

1 Click on the **Setup** button.

2 A search screen of additional Quote Options will be displayed. For a new jobOpportunity where additional options have not yet been created, there will be no entries.
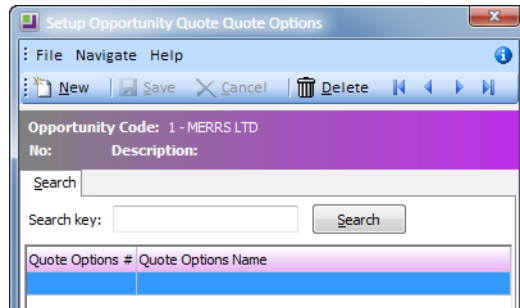
Opportunity Quotes - Setup Quote Options

3 Click on the `New` button to create a new quote option. Double-click on an existing option to edit it.

4 Enter a **Quote Options Name**, or make the necessary changes to the existing name.

5 Click on the `Save` button.

For each line on the Quote tab, the **Quote Option** column can be changed from the **DEFAULT OPTION**.

Selecting or Unselecting a Quote Option in the header panel will include/exclude that option from totals at the bottom of the screen.

The Quote Options can also be used in Clarity reporting to provide alternatively quoted options within the single Opportunity.

Right-click Menu Options

Right-clicking on a quote/budget line will show options relevant to the selected line.

Some of these are common with the toolbar actions detailed above.

Split line This allows a line that has a quantity > 1 to be split into two lines so that they can be acted upon independently. The system will prompt for the quantity to be split-off into the new line:
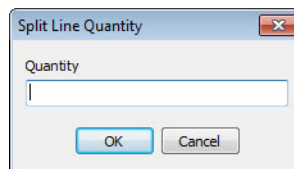
Split Line

The remainder of the quantity will be left on the original line.

Add Narrative (CTRL+N) This allows a line level narrative to be added to or edited for a line. A narrative editing window is opened with blank or previously entered text. Right clicking in the text area provides additional options for inserting text:

- **Insert Common Phrases** works in the same way as in EXO Business Core.

- **Insert Stock Notes** copies the content of the Notes tab from the Stock Item maintenance screen.

Attach line to kit At least one kit must exist on the Opportunity quote before this function can be used. When selected, a search screen of kit headers appears so that you can select which kit the line is to be appended to. The line will be re-sequenced if necessary and added as the last line of the kit.

Remove Line (CTRL+DEL) This deletes the current line from the job. A confirmation request is displayed.

Check Stock Level This checks the current levels of stock relating to the requirements of a quotation.

Marked Lines

The functions under **Marked Lines** on the right-click menu operate on the lines which have checkboxes selected. All lines can be selected/unselected by clicking the checkbox in the column header row. The **Marked Lines** submenu contains the following options:

Set Markup % This function prompts for a markup percentage and adjusts the sell prices of the selected lines accordingly.

Set Gross margin % This function prompts for a gross margin percentage and adjusts the sell prices of the selected lines accordingly.

Set Cost Types This function displays a dropdown list from where the user can select a cost type to apply to the selected lines.

Set Cost Groups This function displays a dropdown list from where the user can select a cost group to apply to the selected lines.

Remove All Marked Lines This function removes all the selected lines from the quote.

Click on the **Save**, **Save & Exit** buttons, or press **CTRL + S** to commit the changes.

Click on the **Cancel** button to cancel changes and returns to the search screen.

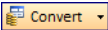> **NOTE**
>
> When adding lines, the checkboxes for those lines will not appear until the quote is saved.

Converting Opportunities

An Opportunity can be converted to one of the following:

- A Sales Order Quote

- A Job Quote (if EXO Job Costing is licensed)

To convert an Opportunity:

1   Double-click on the Opportunity in the Opportunity Search screen.

2   Click on the [Convert ▾] button on the toolbar.

3   Select the appropriate option from the dropdown list.

N O T E

In order to convert an Opportunity to a Sales Order Quote or Sales Order, the company associated with the Opportunity must be a Debtor. If the company associated with the Opportunity is a Non Account, the user will be prompted to convert the Non Account to a Debtor before the Opportunity is coverted.

T I P

If EXO Job Costing is not licensed, the option to convert the Opportunity into a Job is unavailable.

4   The applicable screen (Sales Orders or Job Details) will be displayed.

5   Follow the standard steps for proceeding with the Sales Order Quote, Sales order or Job.

I M P O R T A N T

If the Opportunity has been converted to a Sales Order Quote or Sales Order, the Sales Order screen will be read only. The Quote can only be processed through EXO Business Core.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✔
Create a new Opportunity	
Add a quote to an Opportunity	
Create Quote Options	
Convert an Opportunity to a Sales Order Quote or Job	

Reports & Dashboards

7

In this unit you will learn the basic functionality to to access reports and create and utilise dashboards layouts.

By the end of this unit, you will be able to:

▶ Print, view and export standard reports using Clarity Report Browser and the Dashboard.

Reports

EXO Business's reporting capacity is extensive and there is a vast number of standard reports available. In addition there are a number of tools which allow you to customise and design your own reports and forms as well as produce graphical analysis of information.

Available reports can be viewed via:

Clarity Report Browser

The **Clarity Report Browser** shows all available reports categorised into functional areas. Reports can be previewed, run or added to a user's menu as required.

Dashboard

The **Dashboard** enables each user to display data using widgets created in EXO Analytics.

Functional menu reports drop down

The functional menu reports drop down is located on the lower left hand corner of the main screens (ie Sales, Purchases, Stock, etc). The drop down will show reports that relate to the screen you are currently viewing. For example, on the **Sales** screen the reports drop down will show reports that relate to either **Sales**, **Sales Orders** or **Debtors**. Individual reports can be selected from the drop down menu.

Customise/edit reports

Sales Analysis Designer

The *Sales analysis designer* accesses a core of eight basic report types which can be used to analyse sales. Two groupings can be used, and sales can be grouped by stock (primary and secondary group), debtors (primary and secondary group), location, branches or sales rep. Multiple selection criteria / conditions can also be incorporated into the analysis.

N O T E

Refer to the EXO Advanced Reporting training manual for instructions on how to set up and use the Sales Analysis Designer.

Clarity Report Designer

The **Clarity Report Designer** is a complex utility which can be used to modify existing reports and forms or create entirely new ones. It accesses data from the database tables and presents them using a completely customisable format.

While there is a whitepaper on using Clarity Report Designer, it is generally recommended that interested users attend separate training in Clarity before attempting to generate new reports.

Run reports

Clarity reports are predominantly run from either the **Reports** menu or the **Clarity Report Browser**.

1　Open the **Clarity Report Browser** from the **Reports** menu.
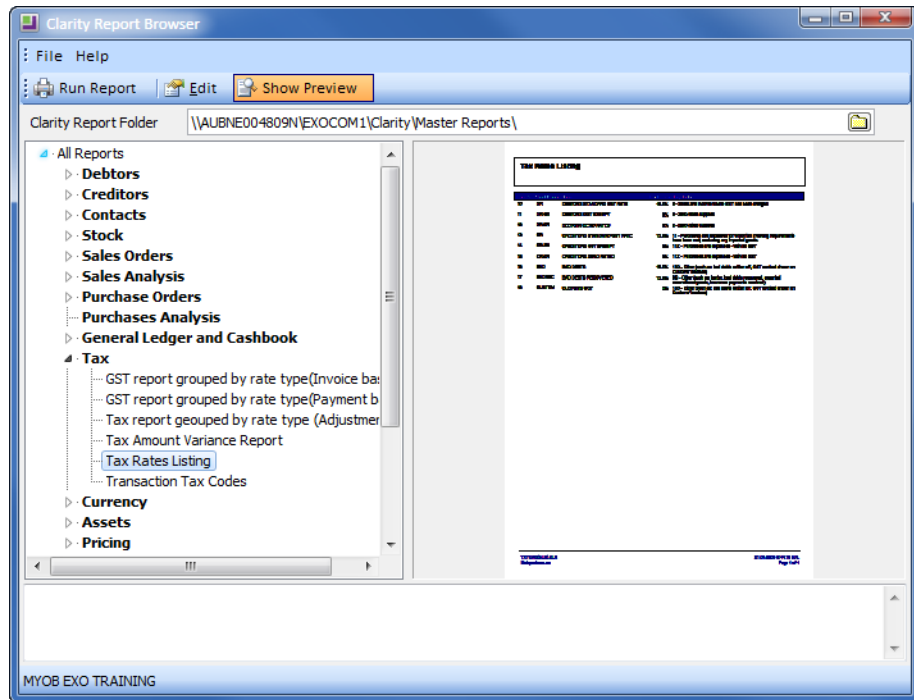
Clarity Report Browser

2　Select the report and click on the **Run Report** button.

T I P

To view a preview of the report, click on the [Show Preview] icon. This will desplay a pdf preview of the selected report.

3 Depending on the report you have chosen, certain parameters will need to be set. The following shows parameters for a stock sales report:

Report Parameters for Stock Sales Report

TIP

Select the **DESC.** option next to **Order By:** to sort the report in descending order.

NOTE

Many reports allow the use of Analysis Codes. If codes are recorded against source transactions and selected as a parameter in the report, then reports show only those transactions that the analysis code has been applied to. Up to two analysis codes can be chosen per report.

4 Once the report has been chosen and the appropriate parameters set, you can choose how you wish to view the information in the report. Click on the appropriate toolbar icon to:

🖨	Print
🔍	Preview on screen
📤	Export to a file for review
🔲	View as a grid
📧	Email a pdf copy of the report
📊	Export

If you have selected **View as a Grid**, you can right click on the header of the ExoGrid and copy the report data to the clipboard for easy pasting into your spreadsheet or other document:


Copy to Clipboard function

Sample Clarity Report: Stock Sales

Add Clarity Report to Reports Menu

Reports can be added to your reports drop down menu via the **Clarity Report Browser**.:

1 Open the **Clarity Report Browser** from the **Reports** tab.

2 **Right-click** on the report you wish to add to your menu and select **add this report to MY Menu**.

3 Change the caption so that it reads the name of the report you wish to add (e.g. Tax Rate List)

4 A **REPORTID=** procedure can be specified. If this parameter exists the specified report will appear as the default selection.

5 Choose the menu location for the report.
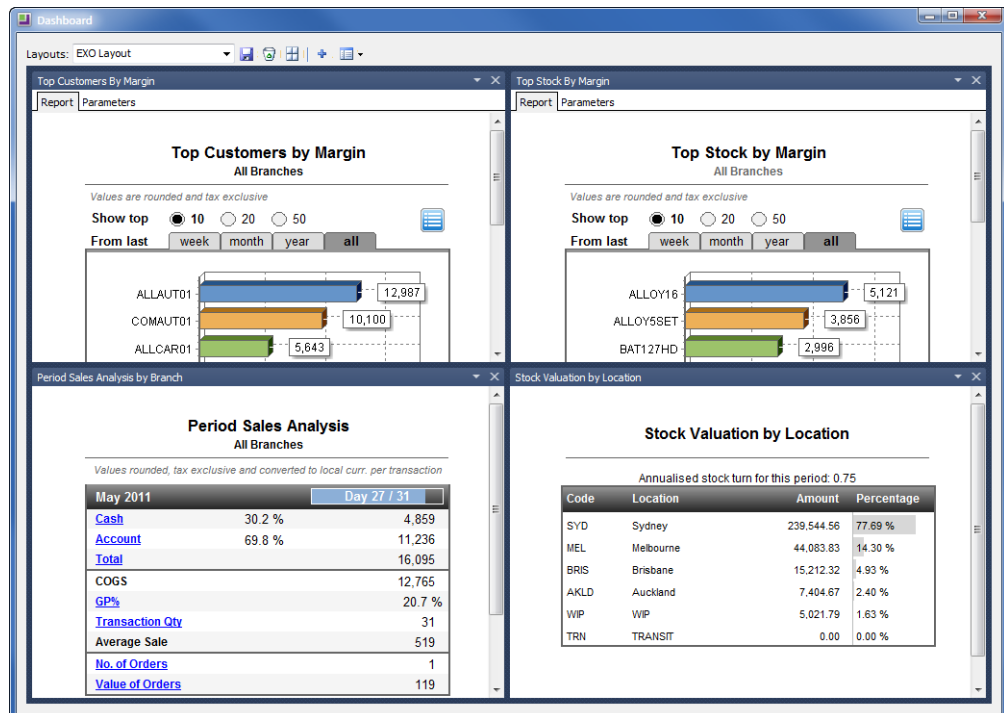
6 Click **Ok**.
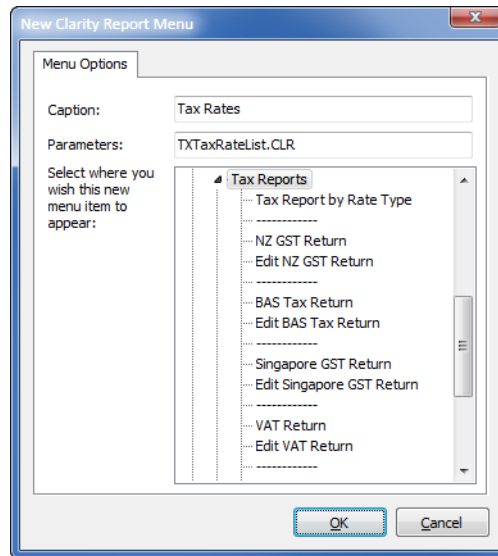
Add Clarity report to menu

Using Dashboards

The Dashboard is launched from the **Dashboard** tab.

The Dashboard enables individual users to set up their own series of dashboards using widgets. .

Sample Dashboard
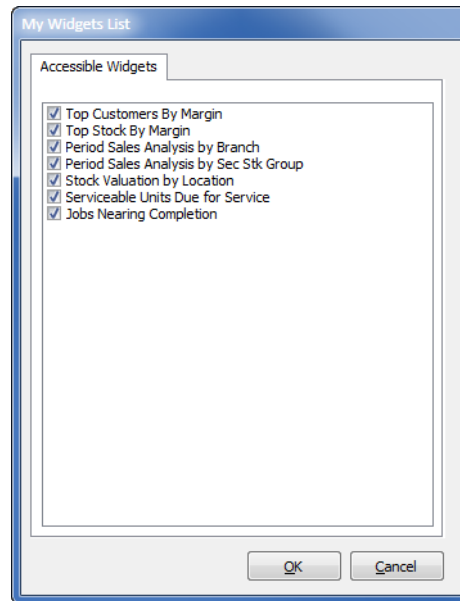
T I P

Clicking on summary data in the Dashboard drills down to source data. This provides even greater detail on specific items "at a glance".

Create a Dashboard Layout

1 Access the **Dashboard** workflow tab.

2   Click on the ⊞ icon. You will be presented with a list of widgets available to you.

List of Widgets available to you

3   Select the widgets you wish to have available on your dashboard layout.

4   Click on **Ok**.

5   Click on the icon to select the widget(s) to display on your dashboard.

6   Click the icon in the toolbar to save your layout (e.g. Demo Layout).

T I P

A user can set up more than one Dashboard layout to be accessed as required. You could set up a "Sales" dashboard as well as a "Finance" dashboard to be opened and viewed separately.

Manipulate Widget Layout

Once a Dashboard layout has been created, you can change the way that you view the widget on the screen.

Resize a widget by clicking and dragging on the border of the report.

Move a widget to a new position by clicking and dragging on the blue report header.

Hover your mouse over the icon to snap the widget to a specific position.

Click on the icon to reset the widgets to the default layout.

Remove widgets from the layout view by unselecting them from the list in the ▦▾ icon as shown below (select again to bring back into view).
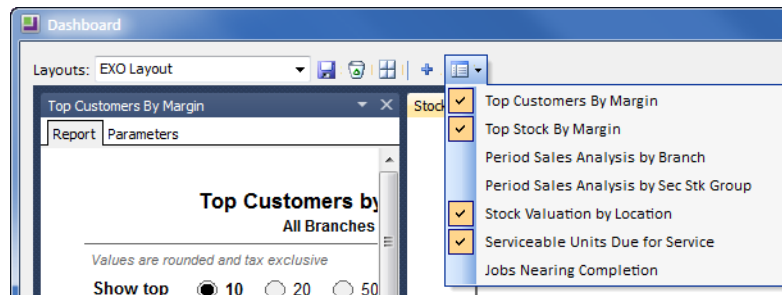
Dashboard view selection

Print or Export Widgets

The Dashboard is primarily designed to view reports on screen to provide an overview of key areas of responsibility for the individual user. At times it may be appropriate to print or export Dashboard reports. This can be done via the individual widget utility dropdown on the individual report as shown below.
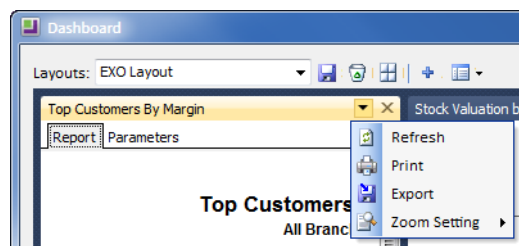
Printing Dashboard reports

New widgets can be creating from **Setup Widgets** under the **Setup** menu. Refer to *'Widgets'* on page 13 for more information.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✔
Run reports using the Clarity Report Browser	
Add Clarity Reports to report menus	
Create a Dashboard Layout	

Campaigns

8

In this unit you will learn how to set up and manage marketing campaigns.

By the end of this unit, you will be able to:

▶ Create Campaigns

▶ Create and process Campaig Waves

▶ View transactions related to Campaigns

Overview

Accounts > Campaigns

Marketing Campaigns are used to generate new business, promote new products or for regular communication with your clients.
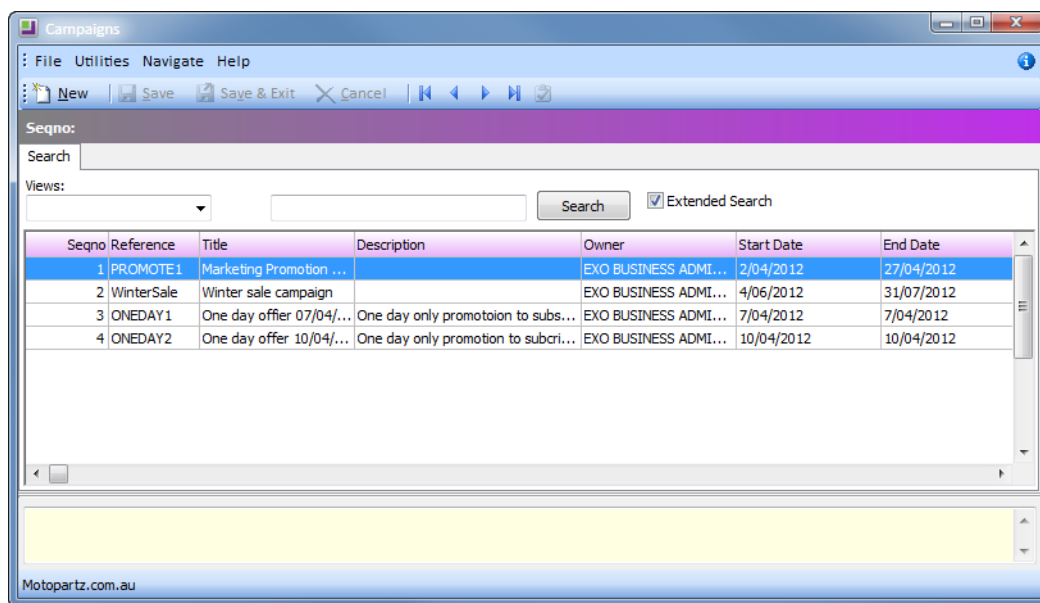
Campaigns

TIP

EXO CRM includes a Campaign Search view, which is available as a Dashboard widget or a standalone window.

The Campaigns view in EXO CRM lists all the Campaigns in the system. Using the **Views** dropdown list, different views can be created to filter the campaigns on user-defined criteria.

To create a custom view:

1 From the **Views** dropdown list, select **Custom View**s.

2 A list of custom views will be displayed.

3 To edit a custom view, select the view in the list and click on the [Edit] button.

4   To create a new custom view, click on the [New] button.
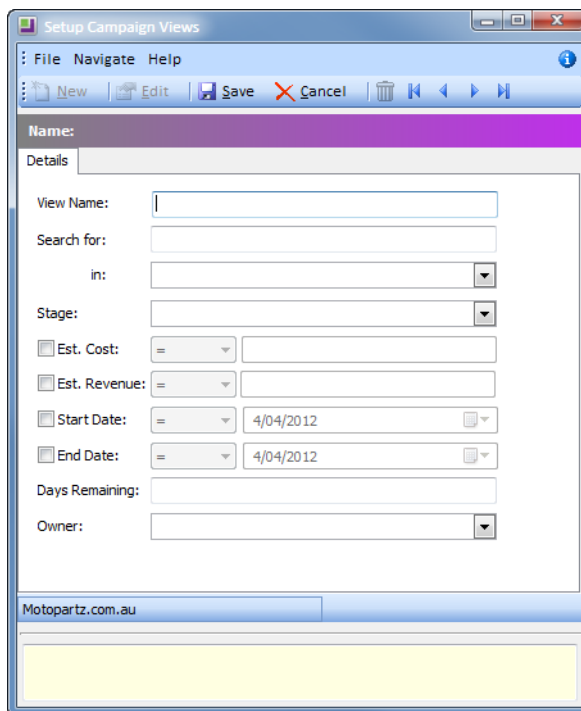
Campaigns - Create new custom view

5   Enter a **View Name**.

6   In the **Search for** field, enter the search criteria for this view.

7   From the **in** dropdown list, the area in the activity to search in.

8   From the **Stage** dropdown list, select the stage of campaign to include in the search.

9   From the **Stage** dropdown list, select the stage assigned to the opportunity.

10 To include an estimated cost in the criteria, click on the **Est. Cost** option.

11 Select the operator to apply to the amount entered:

Operator	Description
=	The estimated cost is the same as the Amount specified.
<>	The estimated cost is less than or greater than the **Amount** specified.
<	The estimated cost is less than the **Amount** specified.

<=	The estimated cost is less than or equal to the **Amount** specified.
>	The estimated cost is greater than the **Amount** specified.
=>	The estimated cost is greater than or equal to the **Amount** specified.
Between	The estimated cost is between the **Amounts** specified.

12 To include an estimated revenue in the criteria, click on the **Est. Revenue** option.

13 Select the operator to apply to the amount entered:

Operator	Description
=	The estimated revenue is the same as the Amount specified.
<>	The estimated revenue is less than or greater than the **Amount** specified.
<	The estimated revenue is less than the **Amount** specified.
<=	The estimated revenue is less than or equal to the **Amount** specified.
>	The estimated revenue is greater than the **Amount** specified.
=>	The estimated revenue is greater than or equal to the **Amount** specified.
Between	The estimated revenue is between the **Amounts** specified.

14 To apply a specific date range to the view, select the options for the **Start Date** and/or **End Date**.

15 Select the operator to apply to the date entered:

Operator	Description
=	The **Start Date** or **End Date** is the same as the date specified.
<>	The **Start Date** or **End Date** is prior to or after the date specified.
<	The **Start Date** or **End Date** is prior to the date specified.

<=	The **Start Date** or **End Date** is prior to or the same as the date specified.
>	The **Start Date** or **End Date** is after the date specified.
=>	The **Start Date** or **End Date** is the same as or after the date specified.
Between	The **Start Date** or **End Date** is the between as the dates specified.

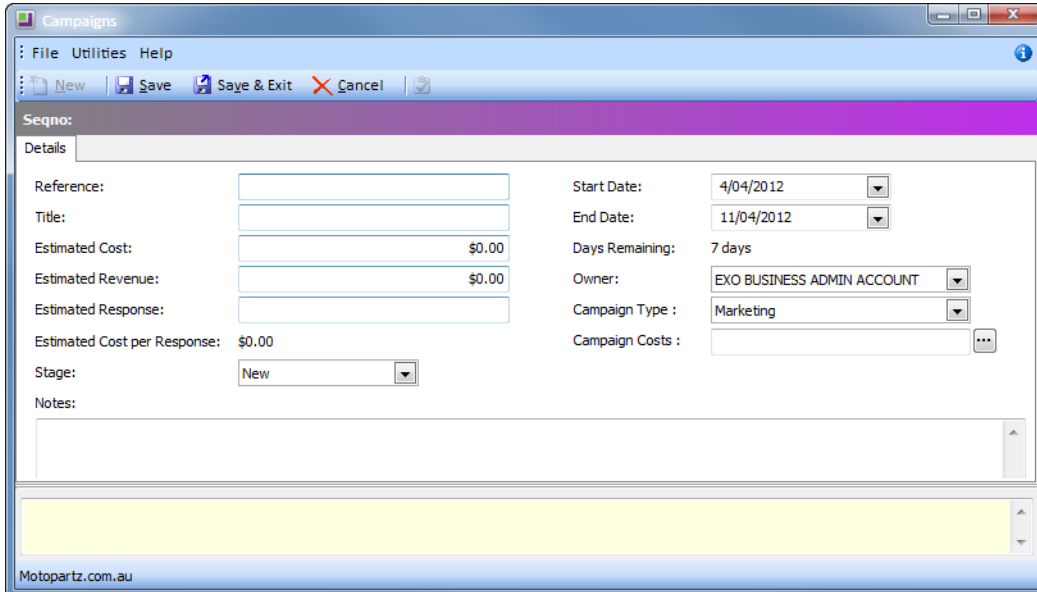**16** In the **Days Remaining** field, enter the number of days left in the campaign.

17 From the **Owner** dropdown list, select the user that is responsible for the campaign.

18 Click on the ![Save] button.

Creating Campaigns

To create a new Campaign:

1 Click the ⬜ New button on the toolbar.

Campaigns - New Campaign

2 Enter a **Reference** code to identify the campaign.

3 Enter a descriptive name for the campaign in the **Title**.

4 enter the **Estimated Cost** for the campaign. This provides a simple mthod of costing campaigns.

NOTE

If EXO Job Costing is being used, advanced costing features are available for campaigns. Refer to the EXO Job Costing User Guide for more information.

5 Enter the estimated revenue that will be generated by the campaign in the **Estimated Revenue** field.

6 Enter the estimated number of respondents for the campaign in the **Estimated Response** field.

7 The **Estimated Cost per Response** is automatically calculated based on the **Estimated Cost** and **Estimated Response** fields.

8 From the **Stage** dropdown list, track the progress of the campaign by selecting the appropriate campaign stage.

9 In the **Notes** field, enter additional information about the campaign.

10 Using the **Start Date** and **End Date** fields, enter the period the campaign will run for.

11 The **Days Remaining** is automatically calculated from the **Start Date** and **End Date** fields, showing how many days are left in the campaign.

12 In the **Ownder** field, select the user that is responsible for the campaign.

13 From the **Campaign Type** select one of the following options:

Type	Description
Marketing	Select this option for marketing campaigns. Contacts that have the option **Opt-Out eMarketing** selected, will be excluded from communications sent as part of this campaign.
Non-Marketing	Select this option for non-marketing campaigns. All contacts will be included in communications sent as part of this campaign.

NOTE

If EXO Job Costing is used, a **Campaign Cost** field will also be available. This field can be used to associate a job that contans the cost for this campaign. See the EXO Job Costing User Guide for more information.

If any extra fiels have been set up for Campaigns, these will appear below the **Notes** field.

14 Click on the ![Save] button.
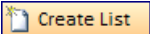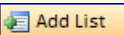
Additional Tabs

In addition to the Details tab, the Campaigns window includes the a number of common tabs.

Activities

This tab shows all the activities created for the campaign. See *Unit 5, 'Activities'*, on page 93 for more information.

Contact Lists

This tab shows the contact lists associated with the campaign.

- To create a Contact Listsm click on the ![Create List] button.
- To add a list to the campaign, click on the ![Add List] button.

- To remove a contact list, right-click on the contact list and select the option **Remove Contact List**.

Waves

This tab shows all the communication waves for this campaign. See *'Campaign Waves'* on page 145 for instructions on creating Communication Waves.

History Notes

This tab shows all the history notes for this campaign.

Transactions

This tab shows all the transactions associated with the campaign. See *'Campaign Transactions'* on page 153 for more information on Campaign transactions.
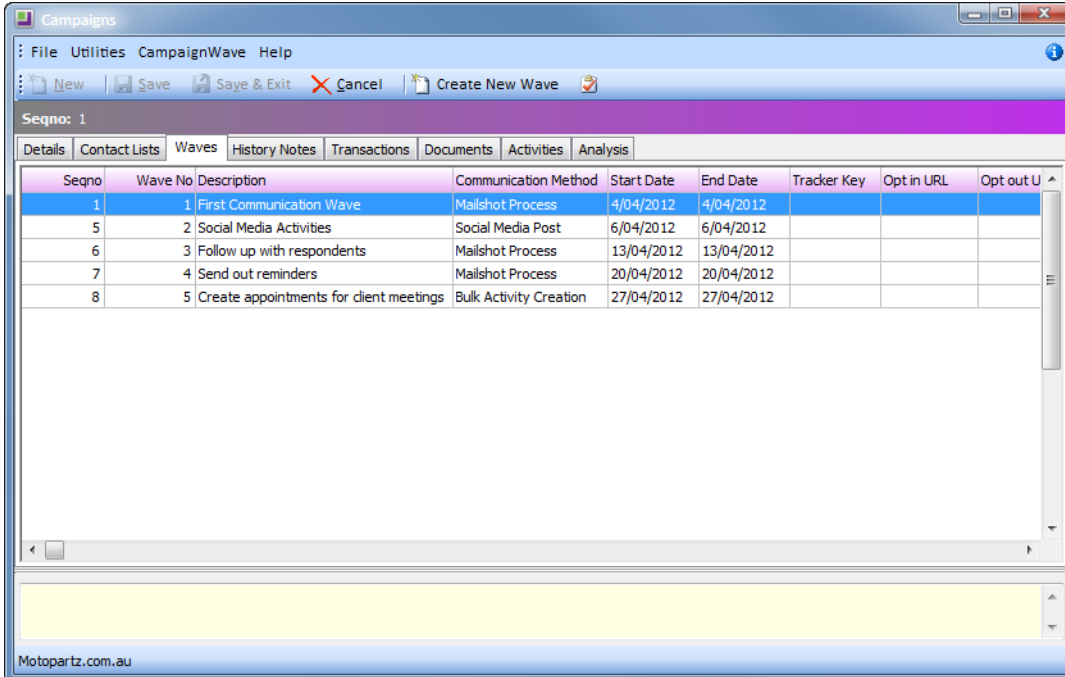
Documents

This tab shows any documents related to the campaign.

Analysis

This tab displays a dashboard interface with widgets that display analysis information on the campaign.

Campaign Waves

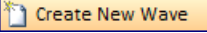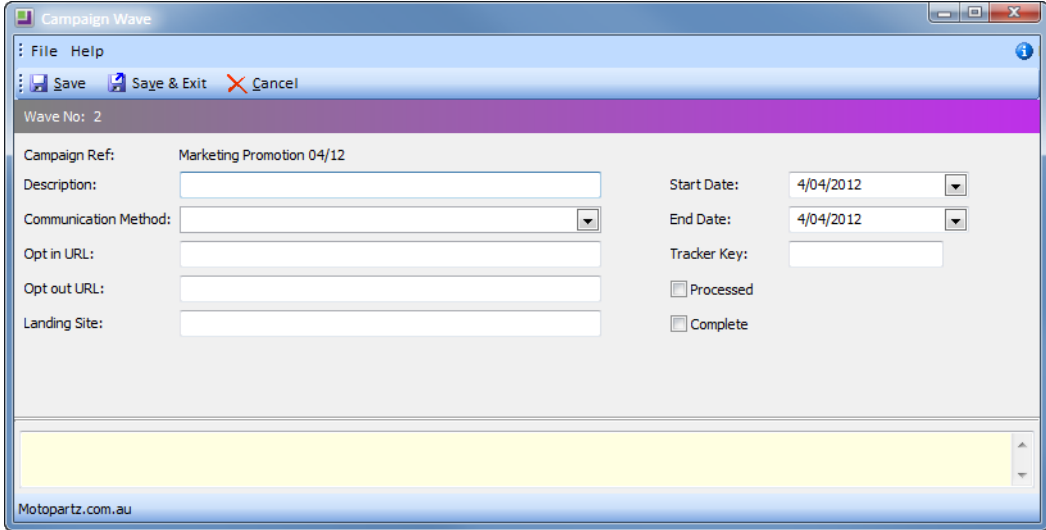Campaign Waves are all the actions planned for a campaign.

Campaigns - Waves

To set up Campaign Waves:

1   Access the **Waves** tab in the Campaigns screen.

2 Click on the [Create New Wave] button.

Capaign Waves - New Wave

3 The **Campaign Ref** field automatically displays the name of the campaign this wave is associated with.

4 In the **Description** field, enter a brief description for this wave.

5 From the **Communication Method** dropdown list, select one of the following options:

Method	Description
Mailshot Process	Select this option to use the "Mailshot" functionality to send the communication. • A **Target Contact Lists** dropdown list will appear from where the Contact List(s) targeted by this wave can be selected. • In the **Opt in URL** field, enter the URL respondants can click on to opt in on the campaign, e.g. signing up for a newsletter. • In the **Opt out URL** field, enter the URL respondants can click on to opt out of the campaign, e.g. unsubscribing from a newsletter. • In the **Landing Site** field, enter the URL respondants can click on for more information, e.g an information page on the company's website. • In the **Tracker Key** field, enter the code word that will be used to measure the success of the campaign. This is used in conjuction with the **Landing Site** to analyse the number of visits to the site generated by the campaign.
Bulk Activity Creation	Select this option to create a bulk activity. • A **Target Contact Lists** dropdown list will appear from where the Contact List(s) targeted by this wave can be selected. An activity will be created against each contact in the selected Contact List(s).
Social Media Post	Select this option to post a message on social media services. • A **Text** field will appear where the text can be entered that is to be posted onto social media services.
Export List	Select this option to export the the details of the contacts selected in the **Target Contact Lists** dropdown list to a CSV file.

N O T E

Execute SQL and *Execute External Program* is also available as **Communication Method**. These are hidden by default. Please see your MYOB EXO Business Implementation Partner for more information about using these methods.

6 In the **Start Date** and **End Date** fields, enter the start and end date that the campaign wave will run for.
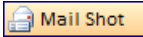
7 Select the option **Processed** to indicate that the wave has been processed. If *Mailshot* is selected as the **Communication Method**, this option is automatically selected once the mailshot has been performed.

**8** Select the option **Complete** to indicate that the wave has been completed.

Processing Campaign Waves

When a campaign wave is processed, a note is added to the **History Notes** tab of the Campaign. A history note is also added to the **History Notes** tab for each contact effected by the wave.

Depending on the **Communication Method** selected for the campaign wave, additional functionality will be made available.

Mailshot Process

When this method is selected for the campaign wave, the [🖨 Mail Shot] button will be available.
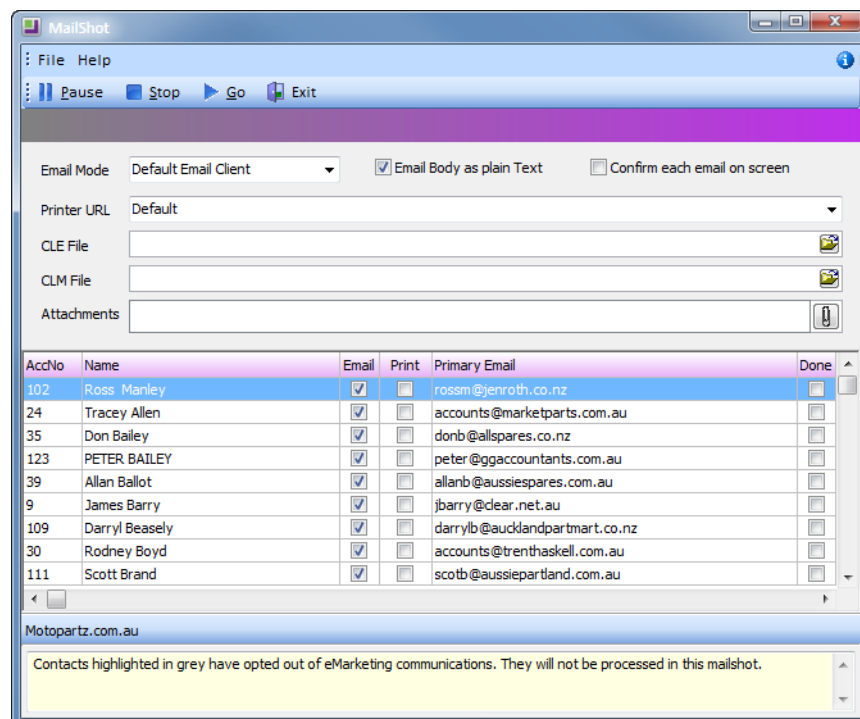
Campaign Waves - Mailshot

- **Email Mode** Form the dropdown list, select how emails should be sent:

  Disabled will prevent emails from being sent.

  EXO SMTP will use the EXO Business SMTP server.
  (Recommended for large batches of emails.)

Default Email Client will use the user's default email software.

- **Email body as plain Text** Select this option to retrict the text format of the email body to plain text, rather than HTML.

- **Confirm each email onscreen** Select this option to display a confirmation message before sending each email.

N O T E

If the **Confirm each email onscreen** option is selected, a confirmation message will appear after the first email is confirmed, providing an option to send the remaining emails without confirmation.

- **Printer URL** From the dropdown list, select the printer to be used for printed statements.

- **CLE File** Specify the Clarity email template to be used for email.

- **CLM File** Specify the Clarity mail merge template to be used.

N O T E

If the **Print** option is selected for any contact and the CLM file is either missing or invalid, a warning message will be displayed.

- **Attachments** Specify any attachments to be sent with the emails.

- From the list of contacts select whether the communication should be sent via *Email* or *Print*ed.

I M P O R T A N T

If the **Campaign Type** is set to *Marketing*, any contact in the selected **Target Contact Lists** that has the option **Opt-Out eMarketing** selected will be highlighted in grey and will not be processed.
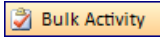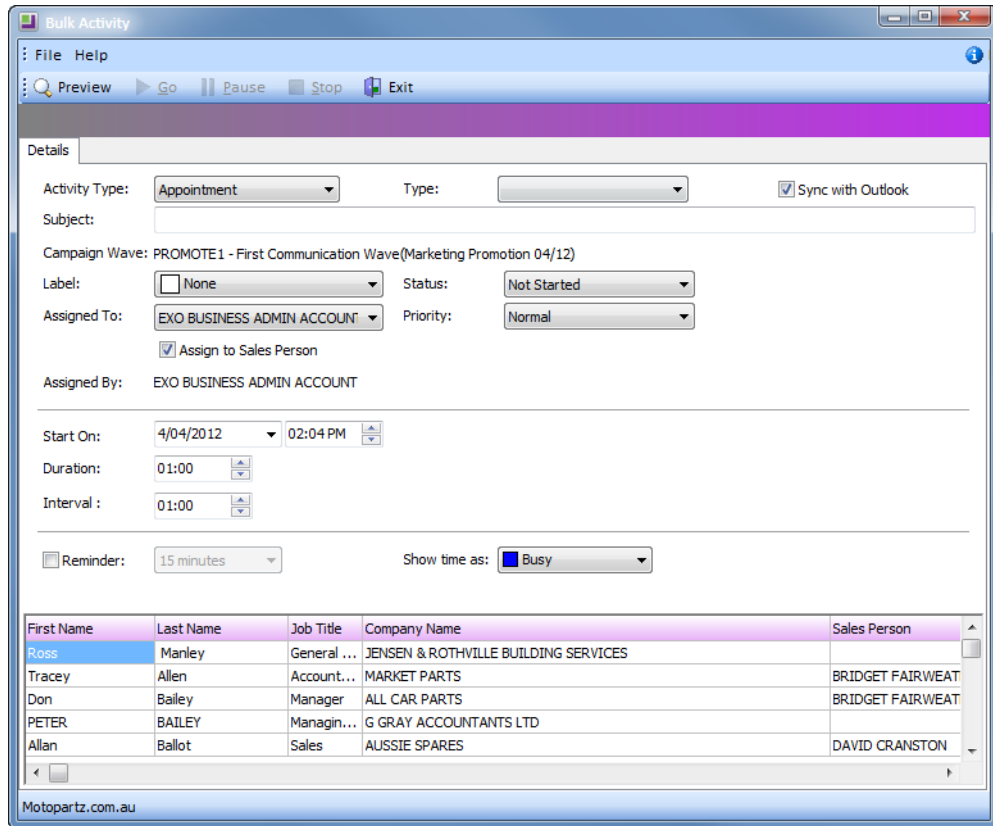
- Click on the **Go** button to start the mailshot.

N O T E

A copy of the email is automatically saved in the contact's **Docs** tab.

Bulk Activity

When this method is selected for the campaign wave, the [🗒 Bulk Activity] button will be available.

Campaign Waves - Bulk Activity

This screen is similar to the Activity screen with the addition of the following:
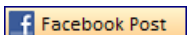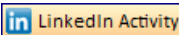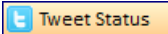
- **Campaign Wave** This field shows the campaign wave associated with the activity.

- **Start On** Select the date and time the activity starts. Using the **Duration** and **Interval** fields, enter the duration of the activity and the interval between activities.

- **Contacts Grid** The bottom of the screen will display a list of all the contact in the **Target Contact Lists** selected for the campaign wave. These are the contacts to which the activity will be added.

If the option **Assign to Sales Person** is selected, each appointment will be assigned to the Sales Person associated with the contact. If this option is not selected, the appointment will be assigned to the user selected in the **Assigned To** dropdown list.

Click on the **Preview** button for a preview of your calendar, showing the appointsments for each contact.

Click on the **Go** button to create the appointment for each of the contacts. Click **Yes** on the confirmation screen to proceed.
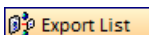
Social Media Post

When this method is selected for the campaign wave, the [Facebook Post] , [LinkedIn Activity] and [Tweet Status] buttons will be available. Click on the relevant social media service to post the contents of the **Text** field on the social media service.

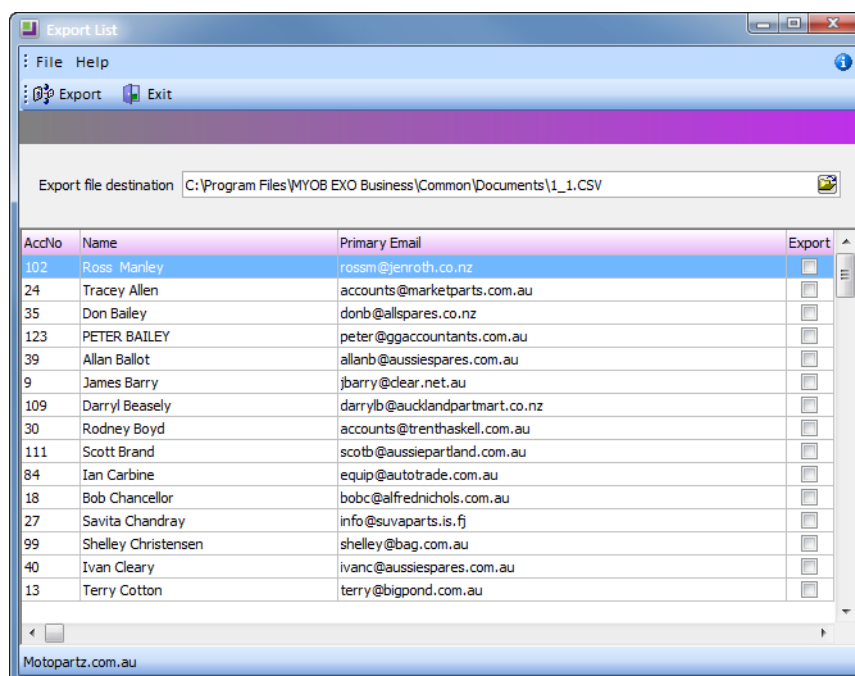### NOTE

Contact your EXO Business Authorised Partner to configure the social media service login details for your company.

Export List

When this method is selected for the campaign wave, the [Export List] button will be available.

Campaign Waves - Export List

- **Export file desination**. Select the location for the export file.

- In the grid, select the checkbox for the contact(s) that should be included in the export file.

- Click on the **Export** button to create the export file. All columns visible in the grid will be included in the export file. To change the columns exported, right-click on a column header and select the topion **Select visible columns**.

This export file can be used to send communications via a third party application.

N O T E

The **Communication Methods** available to users can be restricted. Contact your EXO Business Authorised Partner to discuss this option further.
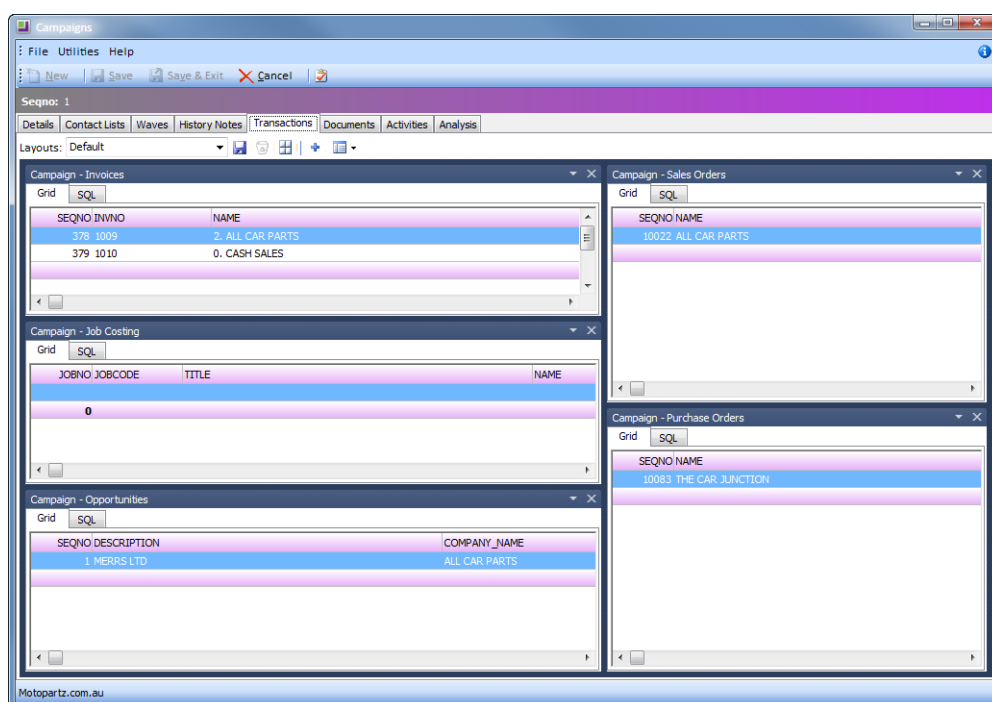
Campaign Transactions

EXO CRM makes a **Campaign Wave** field available on the following screens:

- Sales Orders
- Purchase orders
- Debtor Invoices
- Non Accounts
- Opportunities
- Activies
- Jobs (Refer to the EXO Job Costing User Guide for more information)

This allows all the transactions relevant to a campaign to be associated with that campaign. The campaign wave is tracked through the system where appropriate, e.g. when an Opportunity is converted to a Sales Order.

The transactions tab in the Campaigns screen is a dashboard interface, containing widgets that display all the transactions that have been assigned to the campaign.

Campaigns - Transactions

Widgets are available for:

- Invoice

- Sales Orders

- Opportunities

- Purchase Orders

- Jobs

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✔
Create a new Campaign	
Add Campaign Waves to a Campaign	
Process Campaign Waves	
View transactions associated with Campaigns.	