


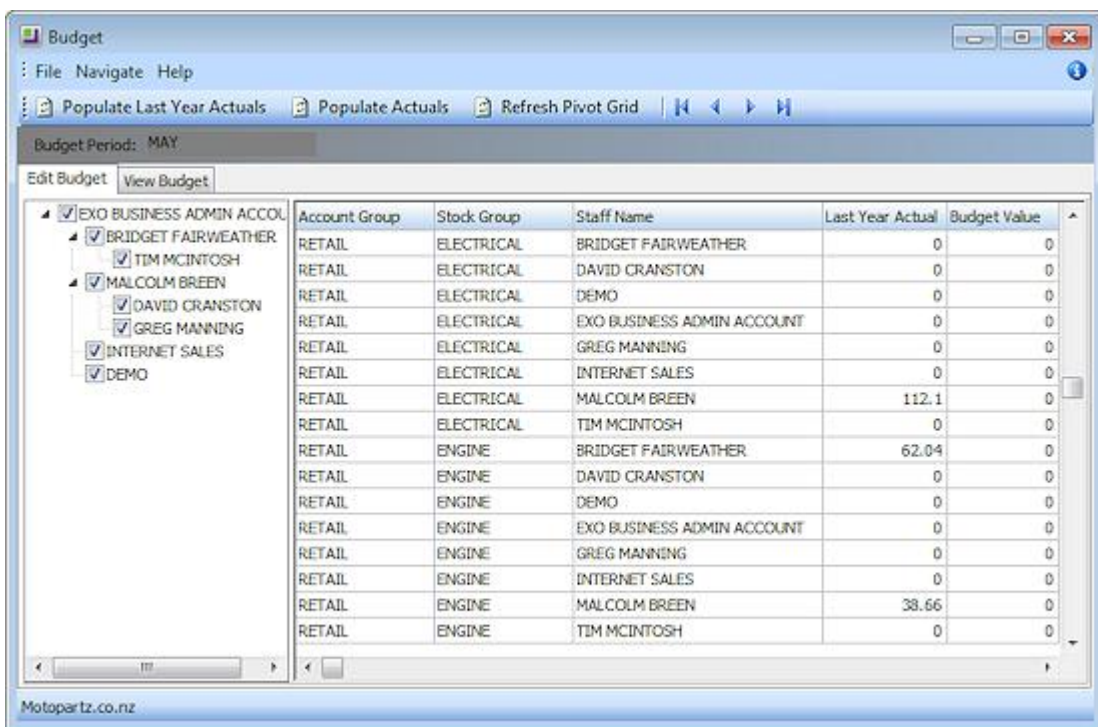
## EXO Business CRM User Guide

4. Select the levels to create budgets at by ticking the required boxes in the Budget Model section. It is only necessary to tick one box for each column - ticking the box for one level effectively selects all levels above it, e.g. selecting to budget by Account Group means that budgets will be created for Account Group 2 as well. It is not necessary to select an option from both columns; you could choose to budget by Stock Group only, for example.
5. Click **Save** to save the budget model.

## Creating and Editing Budgets

Once all budget models have been set up, click the **Update Structure** button on the Budget Models window to generate the budgets specified by the models.

Once created, select a budget and click the **Open Budget** button (  ). The Budget window opens:



All users that report to the current user (directly or indirectly) are displayed in a hierarchy on the left of the window. Tick the boxes for all users that you want to edit budgets for.

Enter budget information into the **Last Year Actuals** and **Budget Value** columns. Clicking the **Populate Last Year Actuals** or **Populate Actuals** buttons automatically fills in the values in the **Last Year Actuals** columns with data from the EXO Business database.

Budget data can be viewed in a pivot grid on the View Budget tab (click the **Refresh Pivot Grid** button to refresh the grid contents after editing budget figures).

Budget figures can be entered directly into this window, or they can be copied and pasted into Microsoft Excel and edited there. Right-click on the column headings and select **Copy to clipboard** or **Paste from clipboard** to copy and paste data.

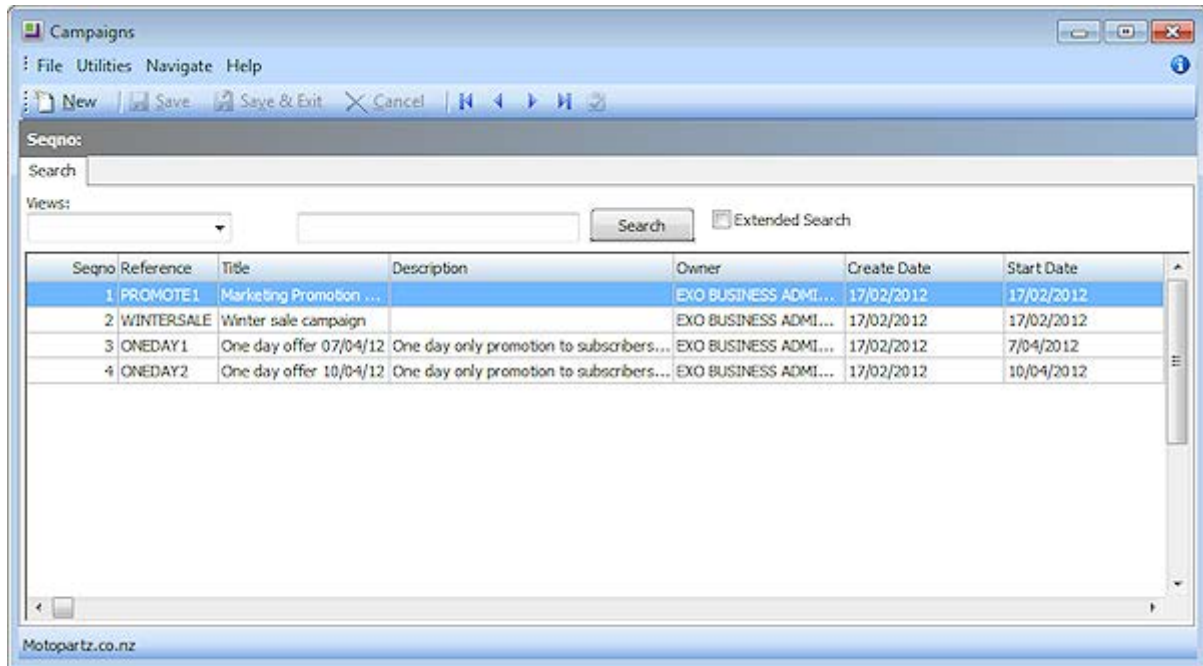
**Note:** The data copied to Excel can be manipulated as required; however, in order to be able to be pasted back into EXO Business CRM, the SEQNO column must remain the first column in the spreadsheet.

# Campaigns

EXO Business CRM lets you set up and run marketing campaigns. The Campaign tab in EXO Business CRM contains the Campaign Search widget, which displays details of all campaigns in the system.

## Viewing Campaigns

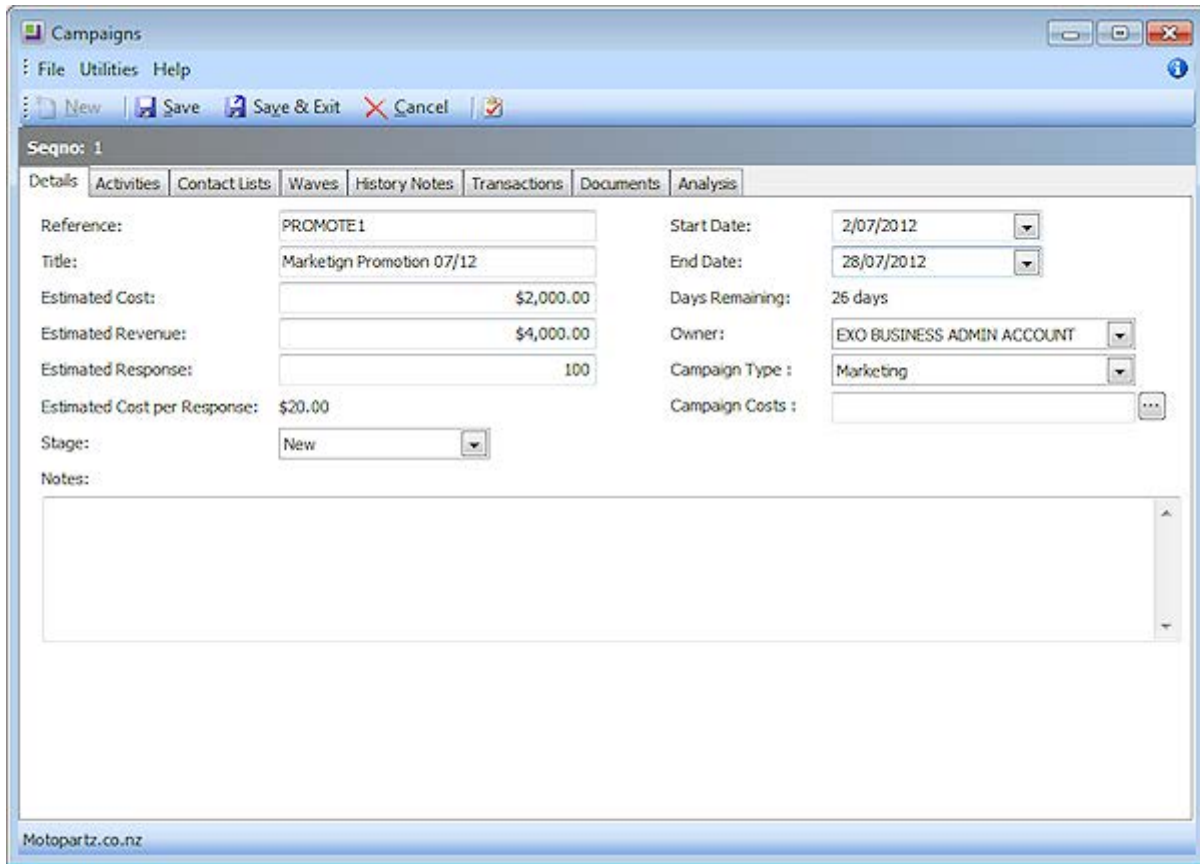
The Campaign Search view in EXO Business CRM lists all campaigns in the system. Double-click on a campaign to edit it.



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

## Creating Campaigns

To create a new campaign, click the **New** button on the Campaign Search window.



The following properties are available on the Details tab:

Field	Description
<b>Reference</b>	Enter a short reference code to identify the campaign.
<b>Title</b>	Enter a descriptive name for the campaign.
<b>Estimated Cost</b>	Enter the estimated costs of the campaign. This provides a simple method of costing campaigns - for more advanced costing, use the EXO Job Costing module and associate the campaign with a job using the <b>Campaign Costs</b> property.
<b>Estimated Revenue</b>	Enter the estimated revenue that will be generated by the campaign.
<b>Estimated Response</b>	Enter the estimated number of respondents for the campaign.
<b>Estimated Cost per Response</b>	The value in this field is calculated automatically based on the values of the <b>Estimated Cost</b> and <b>Estimated Response</b> fields.

<b>Stage</b>	<p>The campaign stage indicates the progress of the campaign from creation to completion. Choose from:</p> <ul style="list-style-type: none"> <li>• New</li> <li>• In Progress</li> <li>• Postponed</li> <li>• Cancelled</li> <li>• Completed</li> </ul> <p>Stages can be added and set up in the same way as Opportunity Stages (see page 40) by selecting <b>Setup Campaign Stages</b> from the Setup menu.</p>
<b>Notes</b>	<p>This field can contain a details description of the campaign, or any other additional information.</p>
<b>Start Date End Date</b>	<p>Use the start and end dates to specify the period over which the campaign will run.</p>
<b>Days Remaining</b>	<p>This field is calculated based on the start and end dates, and displays how much longer the campaign has to run.</p>
<b>Owner</b>	<p>The EXO Business staff member who is responsible for the campaign.</p>
<b>Campaign Type</b>	<p>Select whether this is a Marketing or Non-Marketing campaign. This affects Contacts who have opted out of marketing communications (by ticking the <b>Opt-Out eMarketing</b> flag on the Contacts window); they will be excluded from campaigns that are set as “Marketing”.</p>
<b>Campaign Costs</b>	<p>This field is only available when the EXO Job Costing module is installed. When using the EXO Job Costing module to track campaign costs, specify the job that will contain costs for this campaign.</p>

**Note:** A **Campaign Wave** field is available on jobs. This field is used to indicate that the job was raised as a result of a campaign wave, not that it contains costs for a campaign.

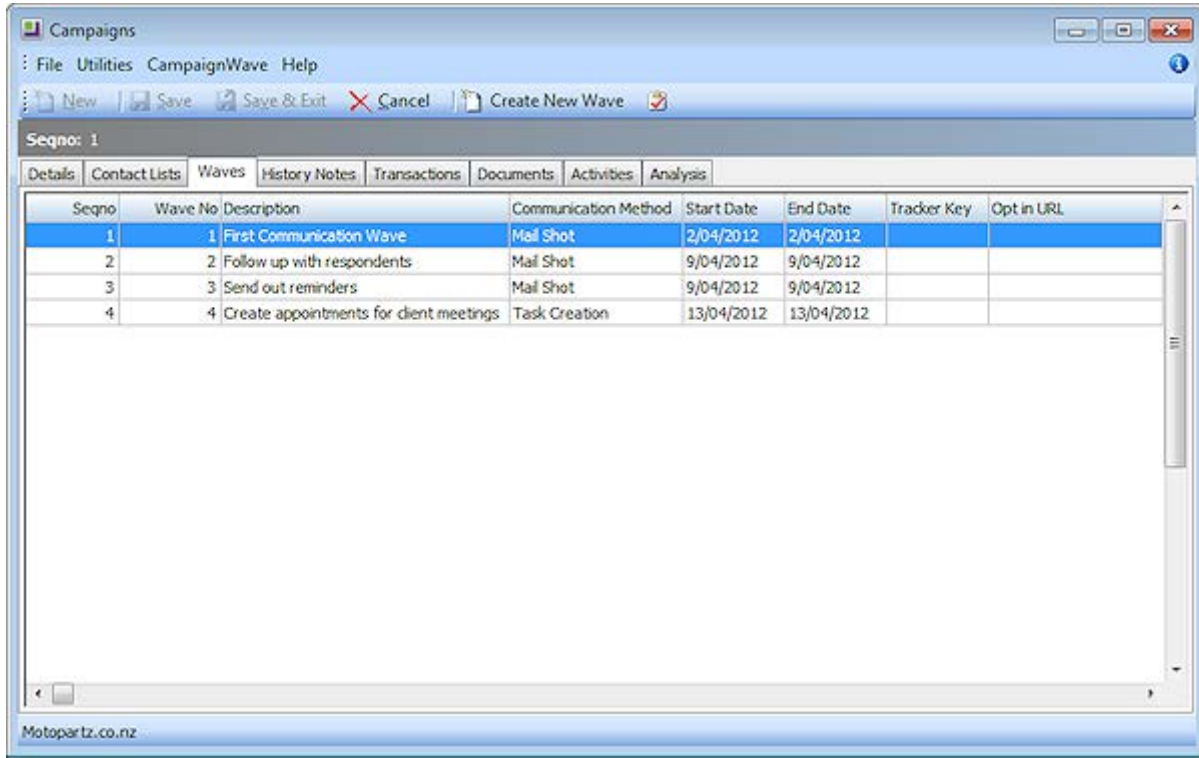
Campaigns support extra fields - if any have been set up, they appear underneath the Notes section.

Once a new campaign has been saved, additional tabs appear next to the Details tab:

- **Activities** - this tab displays all activities (see page 20) created for the campaign.
- **Contact Lists** - this tab displays all Contact Lists (see page 14) associated with the campaign. Contact Lists can be created and added to the campaign from this tab.
- **Waves** - this tab is where the communication waves (see page 50) that make up the campaign are set up and processed.
- **History Notes** - this tab displays all history notes for the campaign.
- **Transactions** - this tab displays all transactions associated with the campaign (see page 57).
- **Documents** - this tab displays any documents related to the campaign.
- **Analysis** - this tab contains a dashboard interface with widgets that display analysis information on the campaign.

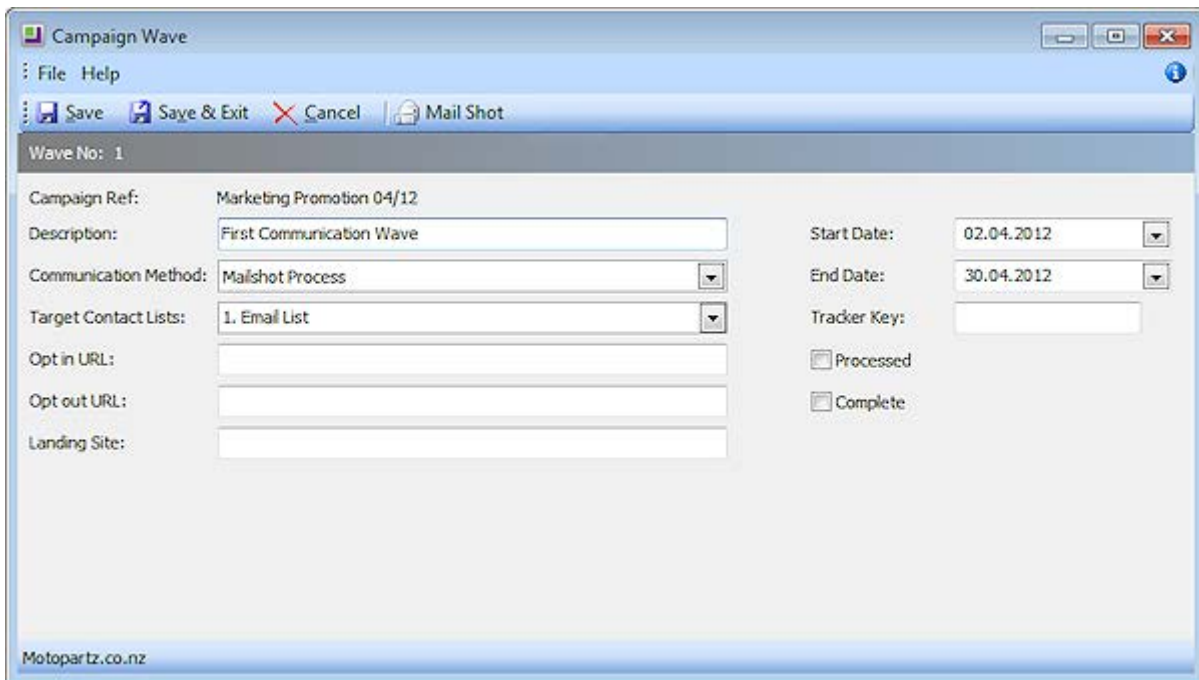
## Campaign Communication Waves

Campaigns can be separated into communication “waves”, which can be processed one after another as the campaign progresses. The Waves tab on the Campaigns window displays all actions planned for the campaign.



## Setting up Campaign Waves

To create a new campaign wave, click the **Create New Wave** button on the toolbar of the Campaigns window.



Fill in all relevant details of the campaign wave. The following details are available:

Field	Description
<b>Campaign Ref</b>	The title of the campaign that the wave is a part of.
<b>Description</b>	A brief description of the wave.
<b>Communication Method</b>	<p>The communication method indicates what action should be performed in this wave. Choose from:</p> <ul style="list-style-type: none"> <li>• Mailshot Process - send bulk communications to selected Contact Lists using the mailshot function.</li> <li>• Bulk Activity Creation - create Tasks or Appointments (see page 23) related to all members of selected Contact Lists.</li> <li>• Execute SQL - execute a custom SQL query against selected Contact Lists.</li> <li>• Social Media Post - post to the company social media networks.</li> <li>• Export List - export the details of selected Contact Lists to a CSV file.</li> <li>• Execute External Program - run an external file or program.</li> </ul> <p><b>Note:</b> Communication methods can be hidden using the <b>Hide Campaign Wave Communication types</b> User-level profile setting; if any of the methods listed above do not appear, check this profile setting.</p>
<b>Target Contact Lists</b>	This property allows you to select the Contact List(s) that the wave should apply to. Its availability depends on which option is selected for the <b>Communication Method</b> .
<b>Opt in URL</b> <b>Opt out URL</b> <b>Landing Site</b> <b>Tracker Key</b>	<p>These fields become available if “Mailshot Process” is selected for the <b>Communication Method</b>. These are details that may be relevant to the campaign wave, which can be included in communications. For example, one or more of them could be included in the email template used by this wave.</p> <p><b>Note:</b> The values entered for these details are stored for each wave in the CAMPAIGN_WAVE table.</p>
<b>Text</b>	This field becomes available if “Social Media Post” is selected for the <b>Communication Method</b> . It allows you to enter the text that will be sent to the target social media network(s).
<b>Start Date</b> <b>End Date</b>	Enter the date range over which this campaign wave will run.
<b>Processed</b> <b>Complete</b>	These flags can be ticked to indicate the current status of the campaign wave. When the wave is processed (see page 52), the <b>Processed</b> flag is ticked automatically.

## Processing Campaign Waves

Campaign waves are processed in different ways, depending on the action chosen for the **Communication Method** property.

Logging functions are available so that campaign waves can be followed up (see page 57) after they have been processed.

When processing a campaign wave that uses one or more Contact Lists, i.e. all communication methods except for “Social Media Post”, you are given the option of refreshing the Contact Lists before processing. This will regenerate the lists based on their list building criteria, capturing any changes to Contacts that have been made since the list was last generated.

**Note:** For lists that do not use the list building criteria, i.e. lists where all Contacts were added manually, there is nothing to refresh, so this option will not appear.

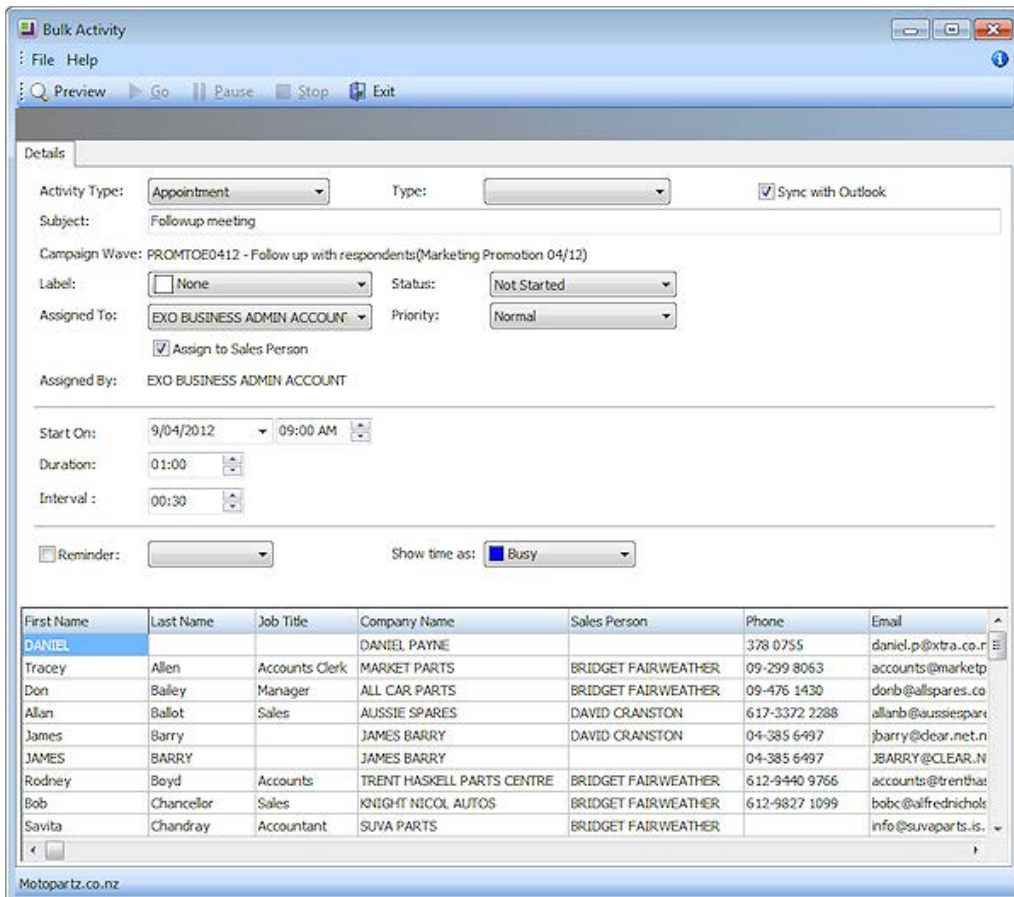
### Mailshot Process

When “Mailshot Process” is selected for a wave’s **Communication Method**, a **Mailshot** button becomes available on the Campaign Wave window toolbar. Clicking this button launches the mailshot process for all Contact Lists selected in the **Target Contact Lists** field.

When performing a mailshot from a campaign wave, any Contacts in the target Contact List who have the **Opt-Out eMarketing** flag ticked will be highlighted in grey, and will not be processed (this only happens for campaigns where the **Campaign Type** property is set to “Marketing”).

### Bulk Activity Creation

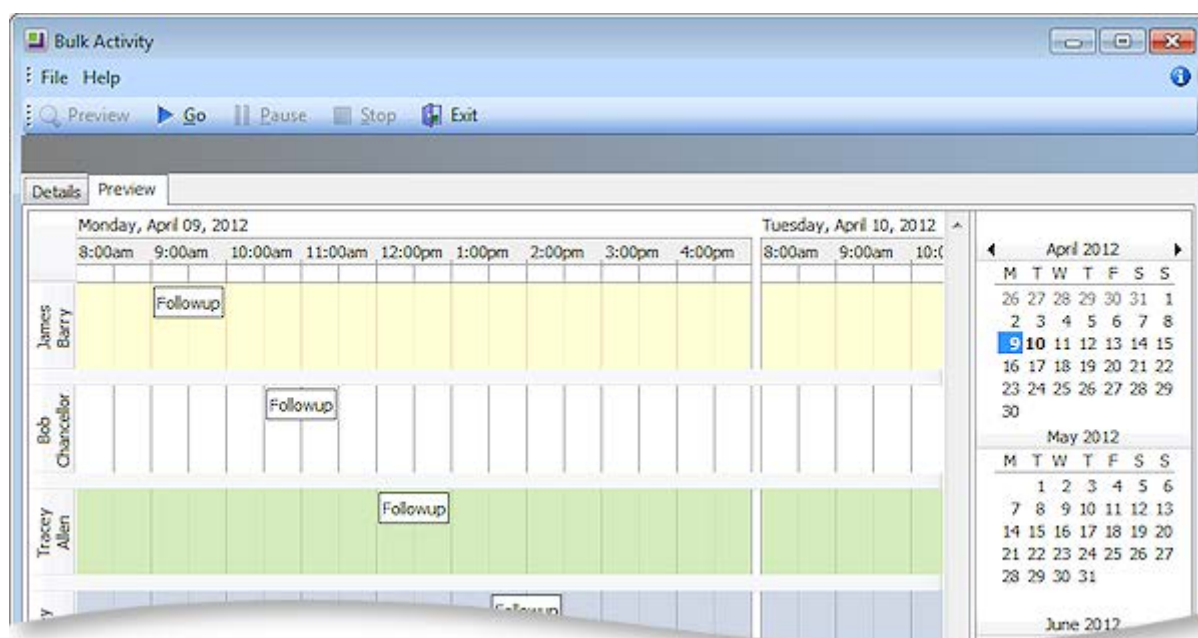
When “Bulk Activity Creation” is selected for a wave’s **Communication Method**, a **Bulk Activity** button becomes available on the Campaign Wave window toolbar. Clicking this button opens a window where you can enter a SQL query to be run against all Contact Lists selected in the **Target Contact Lists** field:



Most of the details on this window are the same as those on the Activities window (see page 20). The following additional fields relate specifically to bulk creation:

Field	Description
<b>Assign to Sales Person</b>	If this option is ticked, each appointment created will be assigned to the Sales Person associated with the Contact. If no Sales Person is specified, the appointment will be assigned to the staff member specified in the <b>Assign To</b> dropdown.
<b>Start On</b>	Specify the date and time when the first activity in the sequence should start.
<b>Duration</b>	Specify how long each activity should last for.
<b>Interval</b>	Specify the interval in between each activity - this is the amount of time between the end of one activity and the start of the next.

Set all details as appropriate, then click **Preview**. A Preview tab becomes available, showing a schedule of all proposed activities:

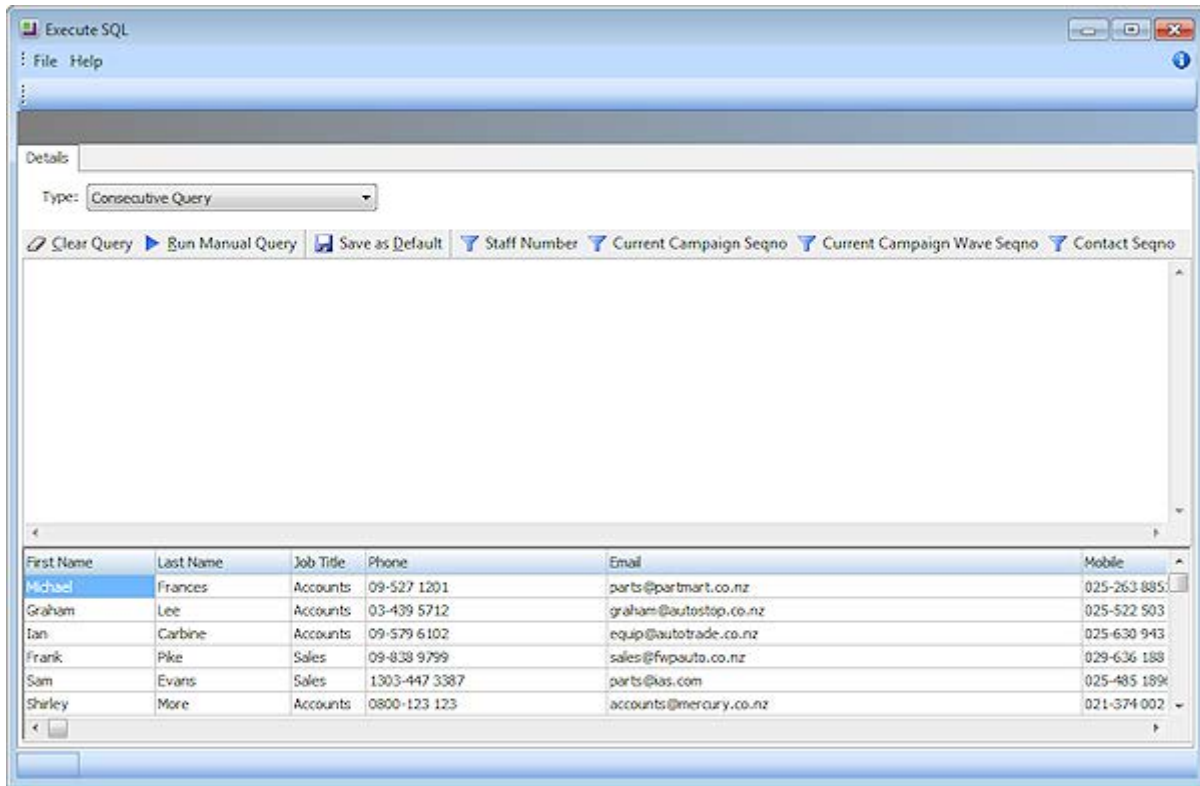


If the schedule is correct, click **Go** to create all activities.



**Execute SQL**

When “Execute SQL” is selected for a wave’s **Communication Method**, an **Execute SQL** button becomes available on the Campaign Wave window toolbar. Clicking this button opens a window where you can enter a SQL query to be run against all Contact Lists selected in the **Target Contact Lists** field:



Select the type of query to run:

- Concurrent - the query will be applied to the entire Contact List in one operation.
- Consecutive - the query will be applied to each contact in the list in turn. When this option is selected, the details of all members of the selected Contact List(s) appear in the bottom pane of the window.

Enter the SQL query into the main area of the window, then click **Run Manual Query** to apply the query.

**Social Media Post**

When “Social Media Post” is selected for a wave’s **Communication Method**, a **Text** field becomes available, and three buttons social media buttons appear on the Campaign Wave window toolbar:

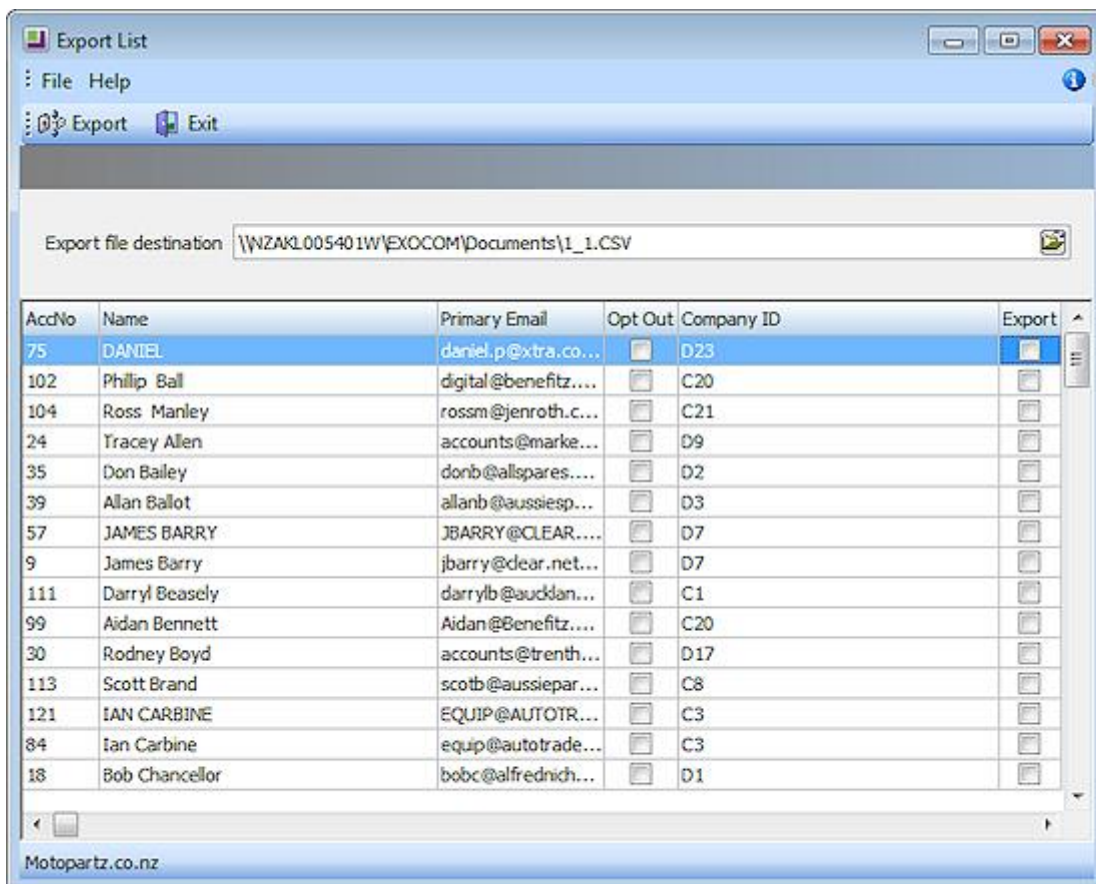
- Facebook Post
- LinkedIn Activity
- Tweet Status

Enter text for the social media post into the **Text** field, then click one or more of the toolbar buttons to post the text to the relevant social media network(s). The accounts posted to are those that were entered in EXO Business Config at **Admin > Social Media > Setup Social Media**. The account details used to post with are those that were used to log in and authorise the social media applications on the Setup Social Media screen.

**Note:** The number of characters entered into the **Text** field is displayed - this is useful when posting to Twitter, as it shows if the text will exceed the 140-character limit for a single tweet.

## Export List

When “Export List” is selected for a wave’s **Communication Method**, an **Export List** button becomes available on the Campaign Wave window toolbar. Clicking this button opens the following window:



All Contacts from the list(s) specified in the **Target Contact Lists** field are displayed in the grid; tick the **Export** box for all Contacts whose details you want to export. Right-click on the column headers and choose **Select visible columns** to select the columns to export; all visible grid columns will be exported to the CSV file, with the exception of the **Export** column.

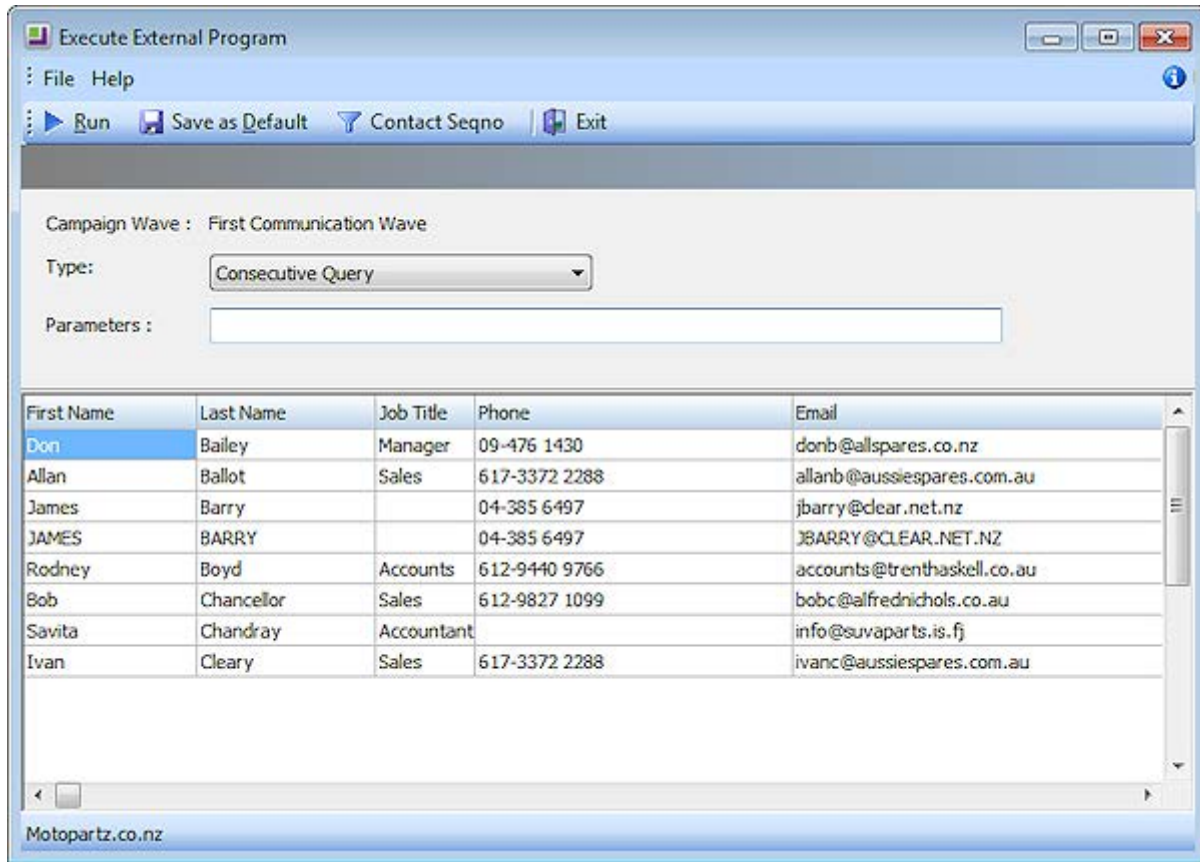
**Note:** Right-click options are available to check or uncheck the **Export** box for all Contacts.

Enter the name of the CSV file to export to, then click **Export** to export the list. The exported CSV file can then be used in third party applications, for example, a third party bulk mailing system.

When exporting to a list, any Contacts in the target Contact List who have the **Opt-Out eMarketing** flag ticked will be highlighted in grey, and will not be processed (this only happens for campaigns where the **Campaign Type** property is set to “Marketing”).

**Execute External Program**

When “Execute External Program” is selected for a wave’s **Communication Method**, an **Execute External Program** button becomes available on the Campaign Wave window toolbar. Clicking this button opens the following window:



The external program can be run in one of two modes, as specified by the **Type** property:

- Concurrent - the program will be run once for the entire Contact List.
- Consecutive - the program will be run for each Contact in the list in turn. When this option is selected, the details of all members of the selected Contact List(s) appear in the bottom pane of the window.

Enter the name of the file or executable to run and any additional parameters into the **Parameters** field. Additional parameters work the same way as they do for custom buttons:

To run an external program, enter

“MyProg.EXE <LOGIN> <CURRENT>”

Where <LOGIN> passes the database connection details and <CURRENT> passes out the campaign wave SEQNO in Concurrent mode and each Contact’s SEQNO in Consecutive mode.

**Note:** Clicking the **Campaign Wave Seqno** or **Contact Seqno** toolbar button adds the <CURRENT> parameter to the end of the parameter string.

Any parameter entered with the extension .CLR will assume that you want to run a clarity report and will call Clarity directly. It is not necessary that Clarity.EXE exist to do this.

Once parameters are entered, click **Run** to run the file or executable.

## Following up Campaign Waves

Several logging functions are available to record when and how campaign waves are processed. The recorded information can be useful when following up on a wave after it has been processed.

When a campaign wave is processed, a History Note is added to the campaign's History Notes tab. A History Note is also added to the History Notes tabs for each affected Contact when using one of the following communication methods:

- Execute SQL
- Export List
- Execute External Program

When using the "Mailshot Process" communication method, a **Save copy of sent email** option is available on the Mailshot window. If this option is ticked, a History Note is created for each Contact that the mailshot was sent to, and a copy of the email is saved to each Contact's Documents tab.

When following up on a campaign wave, it can be useful to know which Contacts the wave was sent to. The CAMPAIGN\_WAVE\_AUDIT table contains a persistent record of which Contacts each campaign wave was sent to. (Checking the Contact List that the wave was sent to may not always be reliable, as the list may have been edited since the mailshot was sent.) Audit logging is available for the following communication methods:

- Mailshot Process
- Execute SQL
- Export List
- Execute External Program

## Campaign Transactions

When EXO Business CRM is installed, a **Campaign Wave** field is available on the following windows:

- Sales Orders
- Purchase Orders
- Debtor Invoices
- Non Accounts
- Opportunities (see page 28)
- Activities (see page 20)
- Jobs (EXO Job Costing module)

This field allows all transactions relevant to a campaign to be associated with that campaign. The specified campaign wave is copied from transaction to transaction where appropriate, e.g. when converting an Opportunity to a Sales Order or a job.

**Note:** You can use the **Track Campaigns On Transactions** Company-level profile setting to turn the **Campaign Wave** field on and off for each transaction type as appropriate.

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The Transactions tab on the Campaigns window is a dashboard interface containing widgets that display all transactions that have been assigned to the currently selected campaign. Widgets are available for Invoices, Sales Orders, Jobs, Opportunities and Purchase Orders.

The screenshot shows the 'Campaigns' application window with the 'Transactions' tab selected. The window displays four data grids for the current campaign (Seqno: 1):

- Campaign - Sales Orders:** A table with columns SEQNO, NAME, ORDERDATE, and SUBTOTAL. It lists two orders: 10016 MARKET PARTS (03.12.2011, 119) and 10017 TERRY'S SPARES (05.11.2011, 452.95), with a total subtotal of 571.95.
- Campaign - Purchase Orders:** A table with columns SEQNO, NAME, ORDERDATE, and SUBTOTAL. It lists one order: 10082 CASH SALES (29.06.2012, 184.55), with a total subtotal of 184.55.
- Campaign - Opportunities:** A table with columns DESCRIPTION, COMPANYNAME, START\_DATE, DUE\_DATE, and AMOUNT. It lists two opportunities: ABC PARTS LTD (MARKET PARTS, 17.11.2011, 20.01.2012, 10000) and WHEEL AUTO PARTS (ALL CAR PARTS, 21.12.2011, 25.02.2012, 1500), with a total amount of 11500.00.
- Campaign - Job Costing:** A table with columns JOBCODE, TITLE, NAME, and STARTD. It lists two jobs: 3 MINOR SERVICE SVJ-625 (OWEN DENTON, 28.03.2) and 16 CUT AND POLISH (CASH SALES, 30.03.2).

The application window includes a menu bar (File, Utilities, Help), a toolbar (New, Save, Save & Exit, Cancel), and a status bar (Motopartz.co.nz).

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