BLUE CHAMELEON : Customer Relationship Manager

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7.9 Customer Relationship Manager (CRM)

The Client interface as lengthfully explained in the Client Management Chapter is vital, but one particular need that could surface in a company is still left unsatisfied : the possibility to manage client needs and client prospection.

Therefore, Blue Chameleon has designed an Customer Relationship Management tool as accessible via the eponymous submenu element in the **Add-ons** command group.
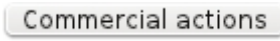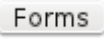
It mainly provides the following possibilities :

- relation-wise manage a potential client, known as a prospect (clients and prospects will be referred to in the following as 'contacts') ;

- send aimed campaigns (such as newsletters) to tactical contact lists ;

- send dedicated letters ;

- finely compose the documents related to those thanks to a handy, built-in document editor ;

- keep a record of all actions (campaigns, letters, appointments,...) pertaining to a particular contact and manage them through time.

7.9.1 Rights related to Customer Relationship Manager

They are ruled at the *Modify User Page* (9.17) for instance as illustrated on Fig.7.53. For this user :

[*Menu script user rights :*]

- CRM - Menu : rules the access to the CRM add-on ;

- CRM - Commercial actions : rules whether a **Commercial actions** is available at the *Client Management Page* (2.3) for client-related action popup to be displayed ;

- CRM - Forms : rules whether a **Forms** is available at the *Client Management Page* (2.3) to generate client-related predefined forms (7.9.10).

The other rights as displayed under [*CRM user rights :*] rule the management (reading, creating, modifying and deleting) of CRM's components :

- Actions (7.9.4) ;

- contacts (7.9.3) and contact lists (7.9.3.5) ;

- campaigns (7.9.7) ;

- letters (7.9.9) ;

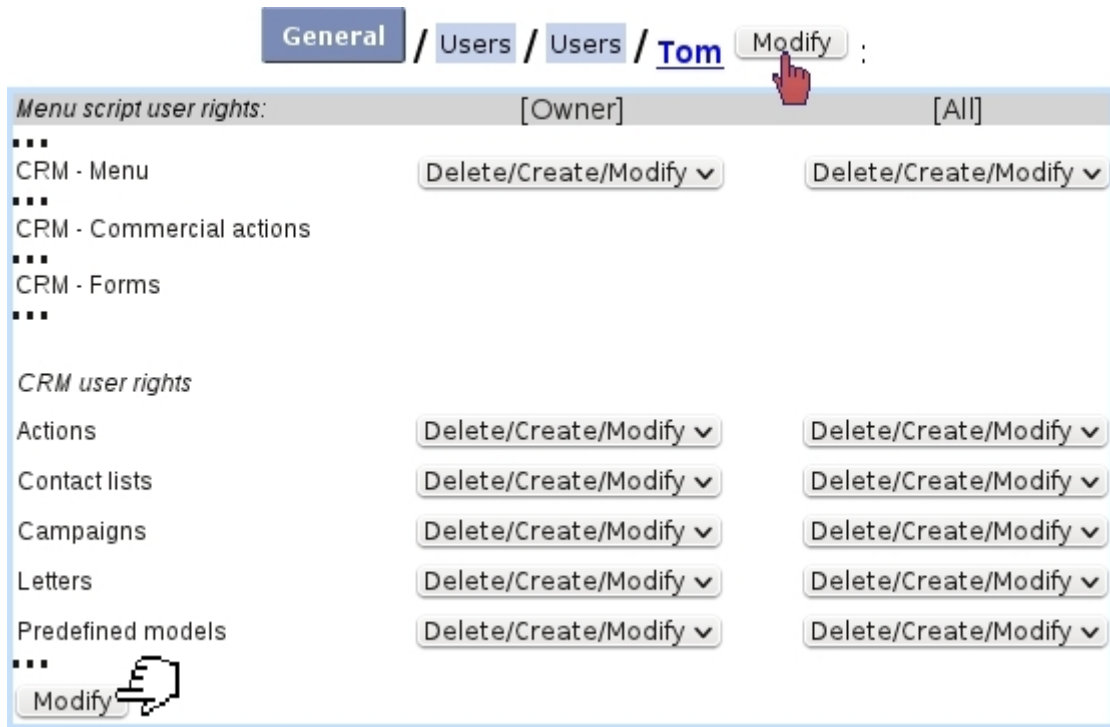- predefined form models (7.9.10).

Figure 7.53: The user rights that rule Customer Relationship Manager.

7.9.2 CRM's Main Page

Figure 7.54: CRM's Main Page.

It is accessed via **Add-ons** / CRM and is featured at Fig.7.54.

There, a list of actions along with search tools (shown in a more detailed way at 7.9.6) is featured ; below, several buttons are available to access CRM's different components (they are available according to user's rights as explained above) :

- contacts (7.9.3) ;

- contact lists 7.9.3.5) ;

- campaigns (7.9.7) ;

- letters (7.9.9) ;

- predefined form models (7.9.10) ;

- statistics (7.9.11).

7.9.3   Contact managing

Everything related to the management of contacts (including the lists gathering them) is cleared up below.

7.9.3.1   Adding a prospect

Prospects are added through `CRM` / `Contacts` / `Add a contact` ; the 'prospect' status is featured on the creating form (Fig.7.55).

7.9.3.2   Uploading a list of prospects

It is also possible to upload a list of prospects via the means a file, which an example is given at Fig.7.56 : line by line, diverse information such as prospect's title, name, address,... are given, and the first line serves as to indicate the nature of the information.

Then, via `Contacts` / `Upload CSV file` , this very file is uploaded and CRM provides menus to indicate how each information given in the first line of the file will be taken as.

Clicking on `Ok` then leads to the *Preview Page* as featured in Fig.7.57, where the upload can be verified and finally validated.

7.9.3.3   Upgrading a prospect

Should a prospect become one day a full-fledged client, this prospect's edit window (as attained through a contact search via `Modify`) features a `Migrate as new client` button that will create a new client file with the prospect's data.

7.9.3.4   Searching for contacts

Contacts can be looked for via `CRM` / `Contacts` . There, as featured in Fig.7.58, a search tool very similar to the one in a *Search Client Page* (except that a drop-down menu allows to filter search by clients or prospects or both of them) provides several search criteria.

Prospects appear there in a light mauve background while regular clients appear in a grey one.

Add a contact

Company :	[ ] **
Title :	Mr ▼
Name :	[Stagger] **
First name :	[Lee]
Type :	**Prospects**
Address :	[10 O'Maley Street] *
	[ ]
	[ ]
City :	[Los Angeles] *
Zip code/Country :	[90000] * [USA ▼]
Phone/Mobile :	[555 9510] * [ ]
Office/Fax :	[555 0101] [ ]
E-Mail :	[ ]
Language :	English ▼
Comment :	This potential client is very interested in our products.

(*) required
(**) Name or company required

Add Cancel

Figure 7.55: Adding a prospect.

A click on a client/prospect name displays in a pop-up windows her/his personal information. General information is featured such as city, zip, phone numbers... is featured ; also, if there is any, the next action (7.9.4) that as to be done for her/him.

The salesperson in charge for each contact (7.9.3.6), if s/he exists, is also featured.

As for buttons at the right, they allow to :

- Actions : displays the list of actions done on this contact (7.9.6.1) ;

- Add action : create a new action on this contact (7.9.4.1) ;

- Add info : create a new 'information' on this contact (7.9.5) ;

- Letters : view individual letters sent to this contact (7.9.9) ;

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```
                      Prospects.csv:
company;title;name;first name;address;city;zip;country;phone;mail;language
Albatross INC;Miss;Berg;Lucia;11 Bungee Rd;Seattle;98100;US;5550203;berg@mailserv.com;EN
;Mr;Black;Chet;23 Beaver Ave;Fargo;58100;US;5556666;blackie@mailserv.com;EN
```
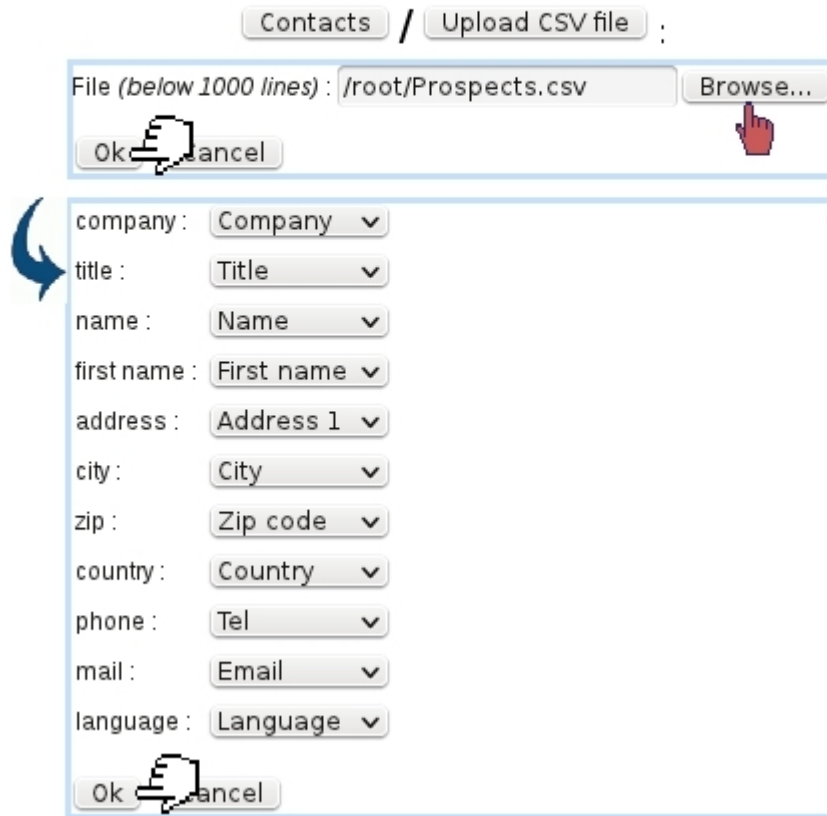
Contacts / Upload CSV file :

File *(below 1000 lines)* : /root/Prospects.csv   Browse...

Ok   Cancel

company :   Company ▾
title :   Title   ▾
name :   Name   ▾
first name : First name ▾
address :   Address 1 ▾
city :   City   ▾
zip :   Zip code ▾
country :   Country ▾
phone :   Tel   ▾
mail :   Email   ▾
language : Language ▾

Ok   Cancel

Figure 7.56: A `Prospects.csv` file, listing prospect data its own way is up-
loaded to CRM, on which matchings are made between the file's information
(on the left, retrieved from its first line) and CRM's own prospect data pre-
sentation (menus on the right).

- Modify (for prospects only) : editing a prospect's general information, similarly as
  seen in Fig.7.55 (for modifying a client's general information, go at her/his *Client
  Management Page*).

7.9.3.5 Creating contact lists

According to common features shared by certain contacts (living in the same area,...),
they can be gathered into contact lists, as shown in Fig.7.59. Then, on the page accessed
via Contact lists , this newly created contact list can be displayed through a search.

In a process shown at Fig.7.60, contacts finally are added thanks to a search led in
this case on the city.

Once created, a contact list's contents can be viewed via (in this example) Contact lists

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Figure 7.57: This *Preview Page* shows that the prospect data has been rightly imported.

/ Search / **L.A. residents**.

Also, contacts can be Add 'ed anytime in a similar way as above via **Modify** ; there, contacts can be individually unchecked to be removed from the list.

Finally, it is possible to **Delete** a list provided it does not contain any contacts.

7.9.3.5.1 Creating/expanding a contact list via an upload
It is also possible, for a already-created contact list, to upload a CSV file of contacts via **Modify** / Upload CSV file . The uploading process is then similar as described in 7.9.3.2.

If contact list already contained contacts, the uploaded contacts are appended at the end of the list.

Figure 7.58: Looking for clients and prospects whose name begins by 'S' inside the contact database.

Figure 7.59: Creating a contact list aimed to gather contacts living in the same city.

7.9.3.6 Salesperson in charge of a contact

CRM, in general, is a sales-oriented aspect of a company ; therefore, a dedicated salesperson (9.6.1) might often follow a prospect, from creation to commercial actions. Blue Chameleon's CRM module features this salesperson anytime a list of contacts is displayed, as it can be seen on Fig.7.58.

Figure 7.60: Adding contacts to a contact list.

Setting or changing the salesperson in charge of a contact is done when an action is taken on a contact, as described next.

7.9.4 Actions

An 'action', in the Customer Relationship Manager context, is any deed that is accomplished on a contact, whether performed by yourself (phonecall, appointment,...) or processed by Blue Chameleon (sending of campaigns and letters), where it is labeled as a 'system action'.

In order to always follow closely a contact, actions are kept in record and may be edited, in the way of comment adding and due date editing.

Also, Blue Chameleon's strong feature for this matter is that distinction is made between past and future actions, the latter being dutifully reminded thanks to a dedicated CRM event control at your desktop (1.3 on how to set it).

7.9.4.1 Taking an action on a contact

As shown in Fig.7.58, after a contact search, a Add action button is available besides each contact.

Upon click, as displayed at Fig.7.61 :

- the current salesperson in charge of this contact is shown at the top ; in the current example, none is yet, so user Thomas Hanson (who has been set as a salesman, 9.6.1) checks the box 'Attribute contact to me' ;

- the status of the action (whether is to do or it has already been done) is set ;

- the action type (see details at 7.9.4.1.1 below) is set ;

- a date and time for this action are set thanks to the dedicated calendar icon (7.9.4.2.1) ;

- a comment, describing the action, is writtem

Actions can also be created when an Agenda appointment is added (7.2.3.1), provided that the corresponding agenda supports CRM assignment (7.2.2.3.1).

7.9.4.1.1 Types of actions
The 'Action type :' menu as found when creating (or modifying) an action contains the following choices :

- letter ;

- Email ;

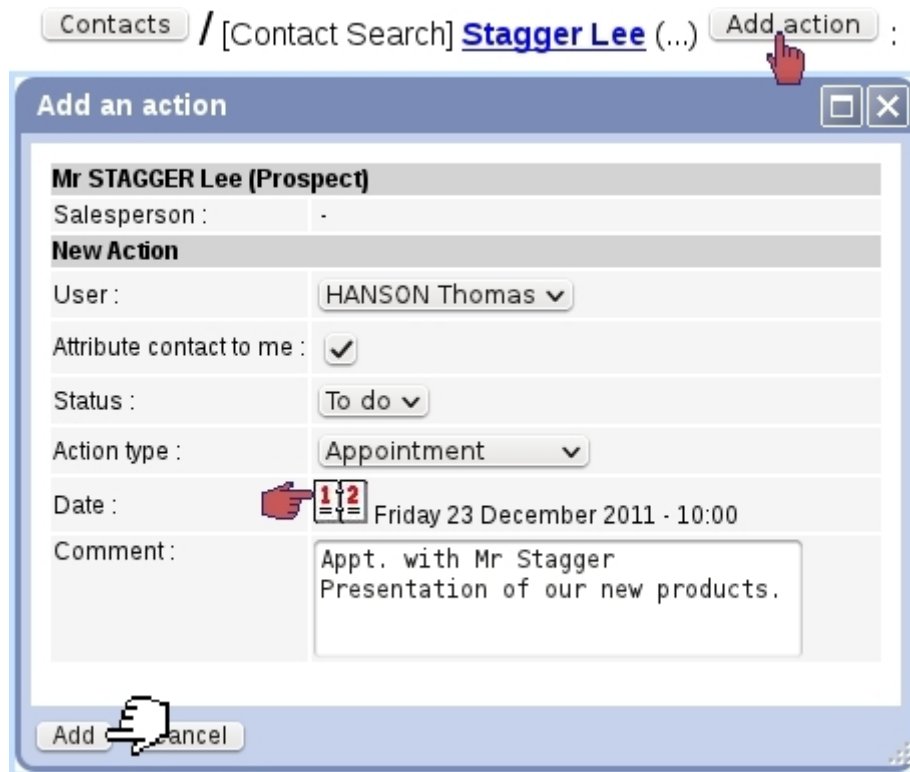- SMS ;

- Call ;

- Appointment ;

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Figure 7.61: Registering an appointment taken with a contact ; the due date as it appears has been set in the way described at Fig.7.62.

- Visit (i.e., in opposition to an appointment, the contact has come her/himself to the company) ;

- Migration to client (as an action to do manually, 7.9.3.3).

7.9.4.2   Managing past and future actions

Blue Chameleon's Customer Relationship Manager makes the distinction between actions that have been accomplished and action that still remain to be done. Once added as described in 7.9.4.1, it is possible to edit an action, in the ways described at 7.9.4.2.2.

7.9.4.2.1   The Action calendar : scheduling actions   This calendar is brought up via the [icon] icon as found next to an action date, in the context of action creation (Fig.7.61) or modifying (Fig.7.65).

   Fig.7.62 shows for instance how a due date is scheduled while creating a new action. In this example, action is created on December, 16 and it concerns an appointment with a prospect that is meant to happen on December, 23 at 10 AM :

1. the calendar is displayed : the current date and time appear on the monthly view and time sliders;

2. December, 23 is then selected, and so is the time of the appointment ;

Figure 7.62: Setting the right date and time for a future action.

3. the appointment with the prospect now appears with the right date and time.

7.9.4.2.2 Editing actions : examples Blue Chameleon's Customer Relationship Manager ensures a great flexibility when it comes to actions. For instance, the following deeds are rendered possible :
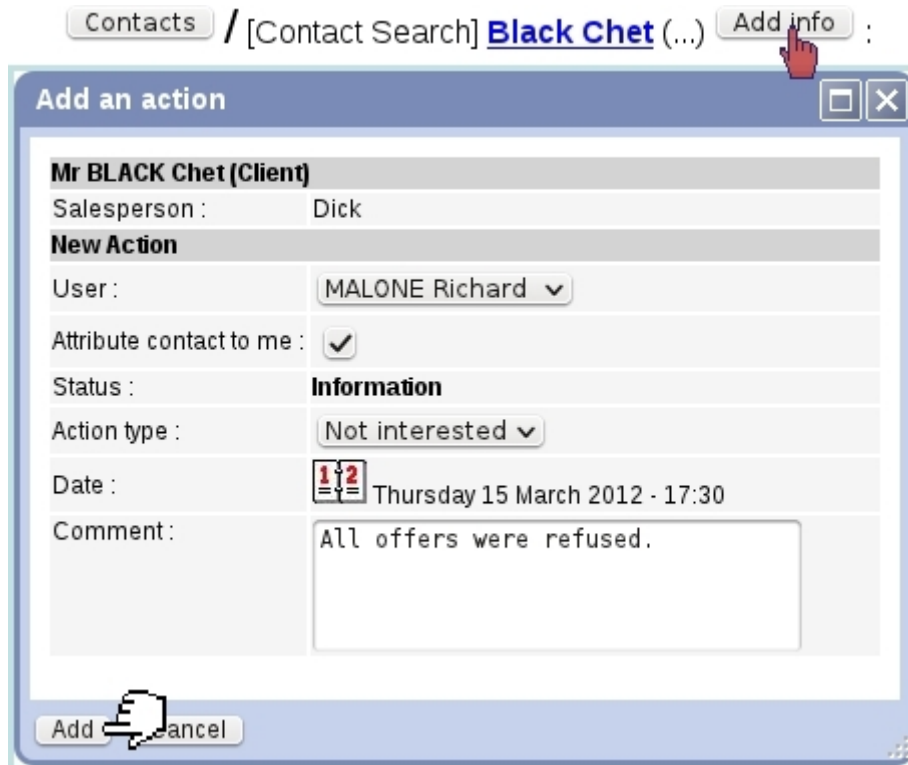
- if an action has been achieved without having been even created in the first place, it is still possible to create it. The creation process will remain the same, and the corresponding date (in the past) and time will be chosen. Also, it is possible to record an action that has been done in the past by just setting the right date and time ;

- postpone the due date and/or time of an action, even on the very day the action was due to happen, or after ;

- advance its due date and/or time, even, for example, schedule a future action on the current day ;

- update its commentary : for instance, after an appointment or a call has been made with a contact, write down the results of the meeting.

The editing of an action is most conveniently done from the page where actions can be searched and displayed (i.e. CRM's Main Page), as detailed next.

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7.9.5 'Information' actions

'Information' actions, in opposition to the 'normal' actions as created above, just aim to feature some current status of the prospect, for instance whether s/he is not interested.

As featured at Fig.7.63, such an action is created for instance also after a contact search (7.58), this time through the [Add info] button ; data to input is similar as for a normal action, except that there is no 'To do/Done' menu.

Figure 7.63: Indicating an information upon a prospect's state.

Available information types are :

- Interested ;

- Not interested ;

- Misc.

7.9.6 Looking for actions

The Main CRM Page (7.9.2), as now detailed in Fig.7.64, features all actions remaining to be done by the current, along with various search menus tool as featured where it is possible to look for actions with various search criteria :

- the issuing user, if rights for Actions ('All') are sufficient ;

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- the related contact, along a search string featured in her/his name ;

- the status of the action : To do, Done, System action (i.e. sent campaigns, letters, and validated migrations to client), and 'Information' actions (7.9.5) ;

- also, displaying a certain number of actions and ordering them along date, status or user.

CRM :

Figure 7.64: This displays for instance all phone-call actions remaining to be done.

From there, for an action :

- Modify allows the action to be updated (Fig.7.65) ;

- Done (only for 'normal' actions that are still to do) declares this action as 'Done' ;

- Action shows the popup to add a 'normal' action (7.9.4.1), preset to the related contact and action type of the line ;

- Information shows the popup to add an 'Information' action (7.9.5), preset to the related contact of the line.

7.9.6.1 List of actions for a contact

While on a list of contacts where the Actions button is available (for instance as seen on Fig.7.58), this button leads to a similar page as the action search page as detailed above except it is dedicated to that very contact.

If the CRM event control has been enabled (1.3), it is possible then, as shown on Fig.7.66, to remind what actions have to be done in the near future.
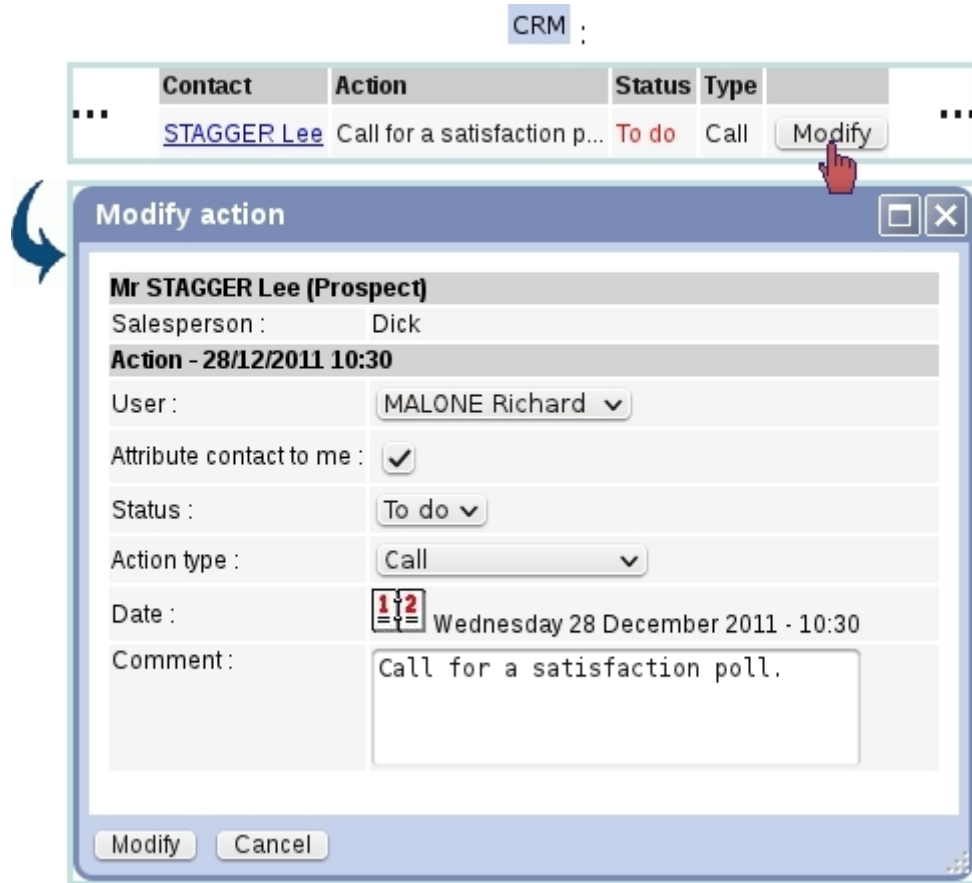
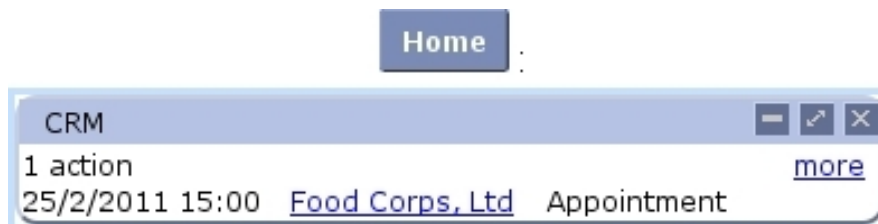Figure 7.65: An action can be modified and updated anytime.

Figure 7.66: The CRM event control, here reminding that an appointment with a client is scheduled.

Clicking on the **Client Name** leads to the page where all actions for this contact are displayed, while the **more** link simply leads to the 'normal' CRM Main Page.

7.9.7 Postal campaigns

Blue Chameleon's CRM tool enables to generate mass mailing campaigns to contact lists. It also integrates a Document Editor, allowing to create model documents. Its use is explained at 13.1.

7.9.7.1 Adding a new postal campaign

Fig.7.67 shows how to create a new postal campaign : on the pop-up window as displayed via Campaigns / Add a campaign , pick user and type (in the following example, 'Postal campaign') and fill in its title.

Figure 7.67: Creating a new postal campaign.

Campaigns, on their main page, can be searched along creating user, title (or part thereof), type (postal/electronic) and status ; campagne results can be ordered by :

- creation date ;

- title ;

- user ;

- type.

This newly-created campaign is assessed the state 'opened' and has still no contacts nor associated documents. A campaign can then be modified and assessed contacts and documents via, as pictured in Fig.7.68, a click on its name (a campaign can be searched anytime via a dedicated search tool). There, several buttons enable to enrich this campaign with contacts as well as documents as explained below.

Figure 7.68: This page allows to manage a campaign (for which, currently, no contact list nor document have been added).

7.9.7.2 Adding a contact list to a postal campaign

Through the Choose button as seen in Fig.7.68, contacts are added to campaign in a simple way pictured at Fig.7.69.

Figure 7.69: Adding the right contact list (7.9.3.5) to a postal campaign.

7.9.7.3 Adding a document to a postal campaign

A model document is what will be sent or printed out for this campaign. If no model document was created for this specific campaign, click on [New model] and follow the how-to as described in 13.3.1.

To upload an already-existing model document, click on [Select model] as available at the *Campaign Manage Page* (Fig.7.68). Then, a File Manager window as described in 7.4 will be displayed, where an already-existing model document is selected ; via a click, it can also be modified and expanded through the Document Editor : see 13.1 for the Document Editor general use.

Whether created or selected, as shown for instance on Fig.7.70, document's name finally appears at the *Campaign Manage Page* ; clicking on it allows to view and modify it via the Document Editor. It is also possible to [Generate PDF file] for this campaign document : once PDF generation is done, it becomes possible to see the PDF file to be printed out via [Print PDF file]. If result was not satisfactory, [Remove PDF file] can be used to delete it.
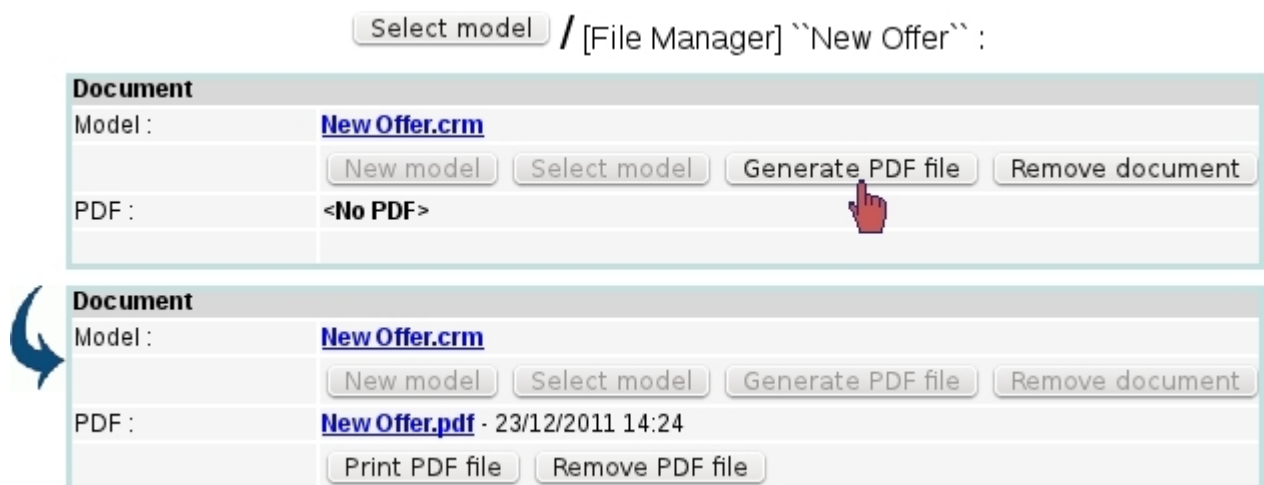
Figure 7.70: Uploading the model document "New Offer" (see 13.3 for details on its creation) and generating the corresponding PDF file.

7.9.7.4 Marking a postal campaign as 'sent'

Once you printed out the PDF file as generated through [Print PDF file] and sent the sheets to your contacts, follow the process as shown on Fig.7.71 to mark this campaign as 'sent'.

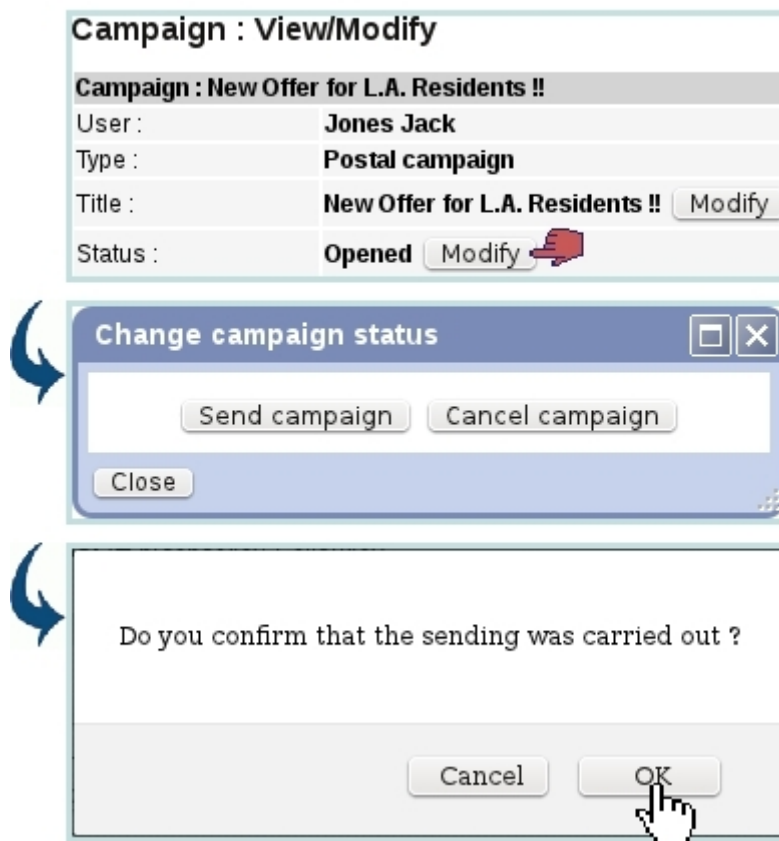[After postal campaign has been printed out and sent] :

Campaign : View/Modify

Campaign : New Offer for L.A. Residents !!	
User :	**Jones Jack**
Type :	**Postal campaign**
Title :	**New Offer for L.A. Residents !!** [Modify]
Status :	**Opened** [Modify] 👉

Change campaign status ☐ ✕

[Send campaign] [Cancel campaign]

[Close]

Do you confirm that the sending was carried out ?

[Cancel] [OK]

Figure 7.71: Marking as postal campaign as 'sent'.

7.9.7.5 Duplicating a sent postal campaign

The *Campaign Manage Page* (7.68) for a sent campaign features a [Duplicate] button allowing to make a copy of that campaign, in a process shown at Fig.7.72. This new campaign can then be renamed via the [Modify] button.

This new campaign contains as default the contact list and model document of the campaign it has been copied from, but it can be changed respectively via [Choose] and [Remove document].

7.9.7.6 Canceling an unsent postal campaign

If there is need to abort a yet unsent campaign, the [Cancel campaign] button as seen in Fig.7.71 will be used. The cancelled campaign still remains is the list of campaigns and can be duplicated.

7.9.8 Electronic campaigns

Electronic campaigns are managed in a very similar way as postal ones (7.9.7) ; instead of paper mails, campaign is dispatched to the contacts via their emails. This functionality

Figure 7.72: Making a copy of a 'sent' campaign.

also uses the Document Editor (13.1).

7.9.8.1 Creating an electronic campaign

An electronic campaign is created most easily along those following steps :

- selecting this time 'Electronic campaign' in the 'Type:' menu as shown on Fig.7.67 ;

- associating a contact list like in 7.69 ;

- adding in the **Email Header** zone information specific to this type of campaign, as illustrated in Fig.7.73 ;

- associating a new document or an already-existing one like in 7.9.7.3.

Once all steps above are fulfilled, the Visualize button as illustrated on Fig.7.74 allows to create a PDF file that can be saved or printed out as a reminder for that electronic campaign. An 'Attached file:' field allows to attach any document to the electronic campaign (7.9.8.4).

Figure 7.73: Creating the header of the electronic campaign 'Weekly Newsletter'.

Figure 7.74: Creating a PDF file that sums up the electronic campaign.

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Example extracts of that PDF file are shown at Fig.7.75.

Print PDF file :

Email campaign

Title :	**Weekly Newsletter**
User :	**Jack Jones**
Creation date :	**3/3/2012|15:42**
Contact list :	**L.A. Residents**
Contact number :	**8 contact(s)**
	1 prospect(s)
	7 client(s)

From : contact@retailfc.com
To : kim.bauer@mailserv.com
Cc :
Bcc :
Subject : **Weekly Food Information Newsletter**

Hello Dear suscribers of RFC Newsletter !

[...]

From : contact@retailfc.com
To : tyler.durden@mailserv.com
Cc :
Bcc :
Subject : **Weekly Food Information Newsletter**

Hello Dear suscribers of RFC Newsletter !

[...]

Figure 7.75: The PDF file generated for an electronic campaign features the campaign's general information as well as the contents of the emails sent to each member of the contact list.

7.9.8.2 Sending an electronic campaign

Once Visualize 'd, an electronic campaign is sent in an identical manner as a postal one, that is to say by clicking on the Send campaign button as seen in Fig.7.71. This marks the electronic campaign as 'sent', and in this case, sends the emails to the members of the selected contact list.

7.9.8.3 Duplicating or canceling an electronic campaign

The duplication and cancellation of an electronic campaign are achieved similarly as for postal campaigns ; please refer to respectively 7.9.7.5 and 7.9.7.6.

7.9.8.4 Attaching a file to an electronic campaign

Blue Chameleon allows to add an attachment to all the e-mails that will be sent through the electronic campaign. For this to be done, the attachment must be uploaded first to the File Manager (7.4.1.1).

As soon as model document is selected, the 'Attached file:' field becomes available ; then, clicking on Add shows the File Manager where aimed document is selected. Its name is finally featured in the aforementioned field, before a ✖ icon that permits to remove it :
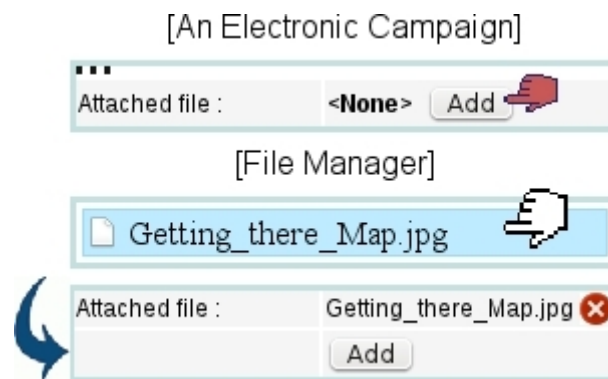
Another attachment can then be added in the same way, to a maximum of 5.

7.9.9   Postal/electronic letters

In contrast to postal/electronic campaigns, letters are destined to *one particular contact.* The process of creating a new letter, for instance of the postal kind, is shown at Fig.7.76.

Once created, clicking on a letter's attached document name (here, **<No document>** for that matter), allows as illustrated on Fig.7.77 to manage this letter. This page displays all the contact's information as well as the same document and status buttons as for campaigns : indeed, the document creation/upload and (in this case) associated PDF generation (7.9.7.3), sending (7.9.7.4), duplicating (7.9.7.5) and cancellation (7.9.7.6) are indeed done in the same exact way as for campaigns.

The sending of an electronic letter similarly follows the same guidelines as an electronic campaign (7.9.8).

Figure 7.76: Creating a new postal letter for prospect Max Burr.

7.9.10   Predefined forms

The use of campaigns and letters as described above is fine for documents that have to be sent periodically ; now, the need to generate postal/electronic documents ready to be printed/sent right at the moment might surface.

It is particularly true for documents which have to feature the client's general information, such as repair sheets, quotes, etc...

Blue Chameleon allows to compose such documents, named 'Forms' in an easy way through the document editor ; they will be then generated through the client's own

Figure 7.77: This page allows to do any letter-related action in the same way as for campaigns.
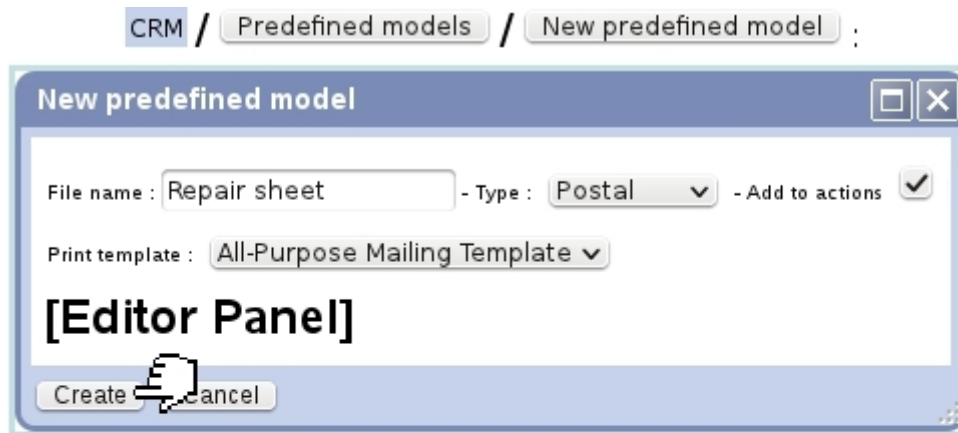
Management Page.

7.9.10.1 Writing predefined form models

A new form model is created as shown on Fig.7.78. There, similarly as for campaign or letter creation, a Document Editor popup shows (13.3.1), with the following elements to fill :

- a name under which to save this predefined model ;

- whether this model will be used for a print-out (postal) or mail-send (electronic) purpose ;

- whether a CRM action will be automatically created when form is generated or sent ;

- a print template (13.2).

Once created, a form model can be modified or deleted.

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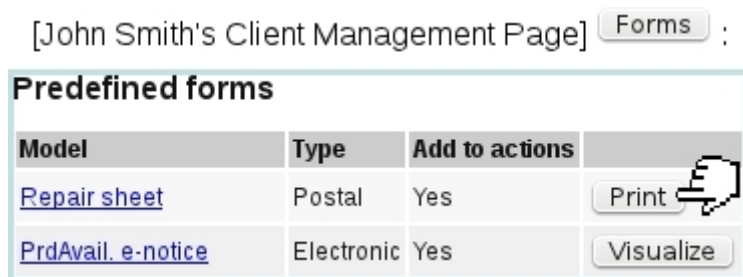Figure 7.78: Creating a new predefined form model.

Figure 7.79: Generating a form ready to be printed out for client John Smith.

7.9.10.2 Generating a form

On a client's *Management Page* (2.3), as featured as an example in Fig.7.79, the `Forms` button allows then to generate the forms corresponding to the models defined as described above, and also to automatically insert an action if predefined model has been defined to.

'Postal' forms have a `Print` button that, upon click, displays the corresponding PDF, of which an example is displayed at Fig.7.80.

'Electronic' forms, on the other hand hand, have a `Visualize` button leading to a page where email information (such as the sender, subject...) has to be given before sending (Fig.7.81).

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Figure 7.80: An example of a form to be printed out.

These examples make good use of "Client (and other) variables" (13.1.6), allowing to feature client information as well as date, time... without knowing them in advance.

Figure 7.81: Sending a dedicated email right from the client's page, and also creating an action for the record.

7.9.11 Action statistics

As time passes, more and more actions, whatever their type, are added to the system ; to keep a clear, quantitative view of the actions that have been done by type and status (especially how many actions remain to be done) as well as compare the performances of the various users, Blue Chameleon provides a action statistic tool, as accessible from CRM's main page.

As featured on Fig.7.82, a menu allows to select a specific user (or all of them) and a range of dates (corresponding to actions' due dates). Results are twofold : a table for the 'normal' actions (7.9.4) and a table for the 'Information' actions (7.9.5).

For each of those, number of actions according to each type are shown ; and for nor-

mal actions, numbers of actions to do, to be done and done by the system are displayed. Type names as well as the two 'TOTALS' are click-links, which lead to an action search page (7.9.6), for which the User and Action type menus already preset and the action status set to 'To do'.

For instance, clicking on the 'SMS' link would show, for the selected user, all SMS actions remaining to be done.
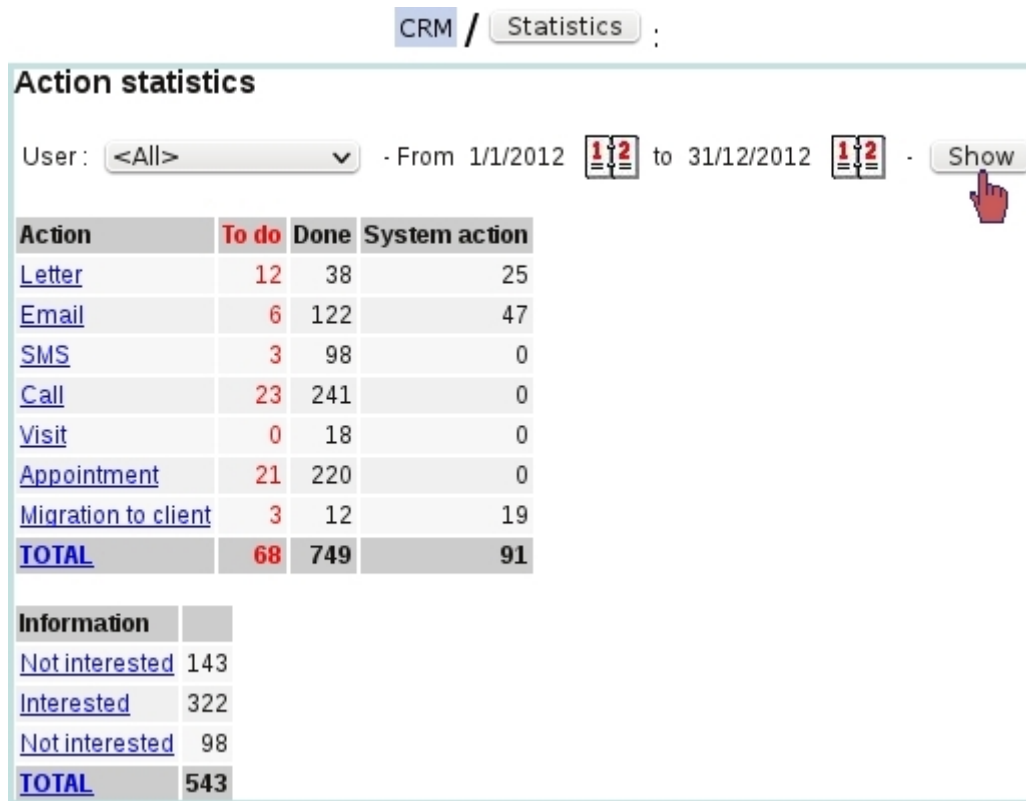

Figure 7.82: A complete, numerical view on actions.

7.9.11.1   Action statistics, on a specific contact list

For more targeted action statistics, as featured on Fig.7.83, a viewed contact list can offer similar action-wise statistics, related on the contacts it contains.

CRM / Contact lists / [Contact List Search] **L.A. residents** :

View contact list

Name :	**L.A. Residents**
User :	**Jack Jones**
Comments :	**Clients and prospects living in L.A. or vicinity.**
Number of contacts :	**8 (*7 clients, 1 prospect*)**

[List of contacts]

Action statistics

From 1/1/2012 🔢 to 31/12/2012 🔢 - Show

Action	To do	Done	System action
Letter	3	5	10
Email	2	32	15
SMS	1	31	0
Call	8	71	0
Visit	0	6	0
Appointment	21	73	0
Migration to client	1	4	5
TOTAL	**36**	**222**	**30**

Information	
Not interested	41
Interested	106
Not interested	28
TOTAL	**175**

Figure 7.83: These are the actions statistics pertaining to all contacts of a contact list.