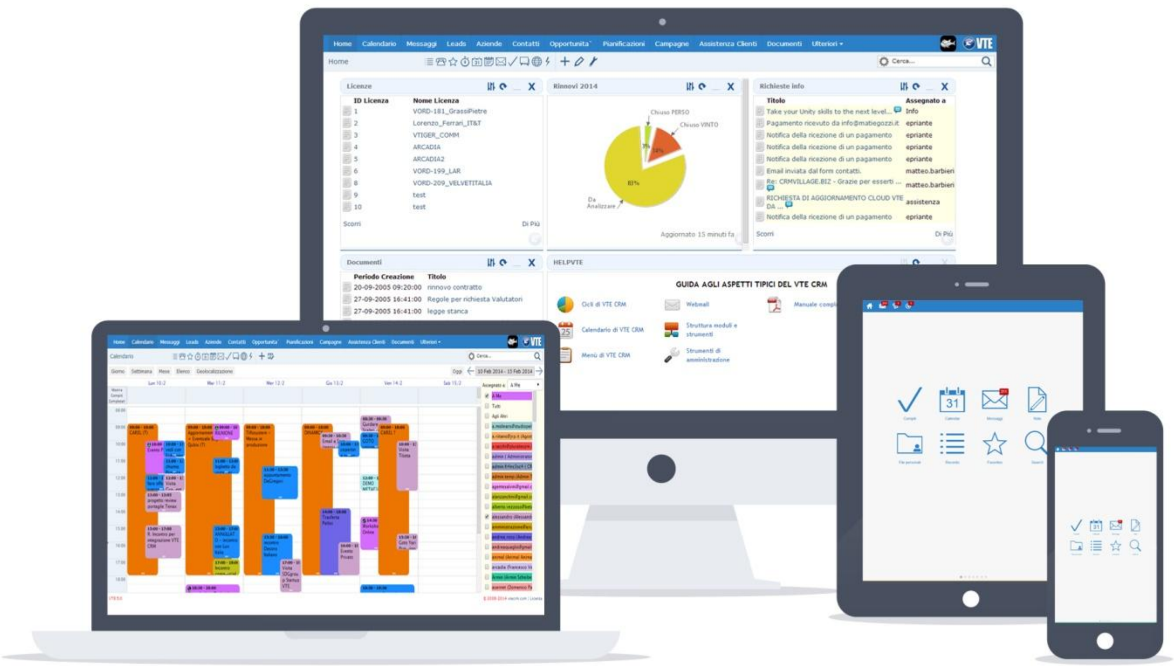
15.05

VTECRM



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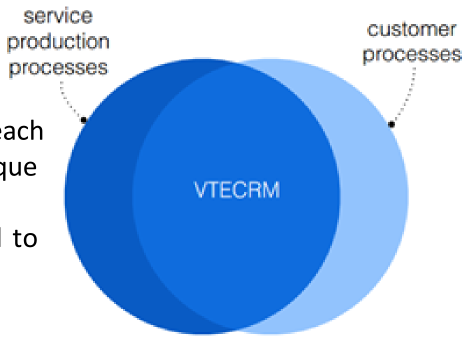
1. Introduction to VTECRM

1.1 What is VTE?

All the main processes of a company of any size or sector are related to customers. The real “production process” is the service made for the customers. In fact, if we read the definition of “services”, they are “intangible products such as accounting, banking, cleaning, consultancy, education, insurance, expertise, medical treatment, or transportation… No transfer of possession or ownership takes place when services are sold, and they 1) cannot be stored or transported, 2) are instantly perishable, and 3) come into existence at the time they are bought and consumed” (source: http://www.businessdictionary.com).



VTECRM allows the services companies to manage services and customers at the same time. The application is designed to follow the customer cycle from the beginning (lead, opportunity, orders) to the end (post-sales, maintaining of loyalty). Moreover, allows to manage projects, tasks, daily activities of each user, with real-time responses and sharing information. Thanks to this unique work environment, the company increases the value of its database.
VTECRM is thought to structure the unstructured information, mainly related to email and calendar activities, archiving them and making them accessible.

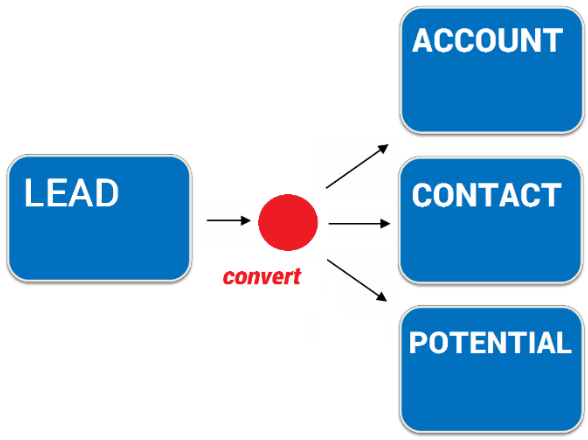
The main tools of VTECRM:

- data management
- personal tools
- social tools and sharing
- customer management
- marketing campaigns
- sales
- administration
- post-sales and support service
- inventory
- project management
- data analysis
- advanced settings

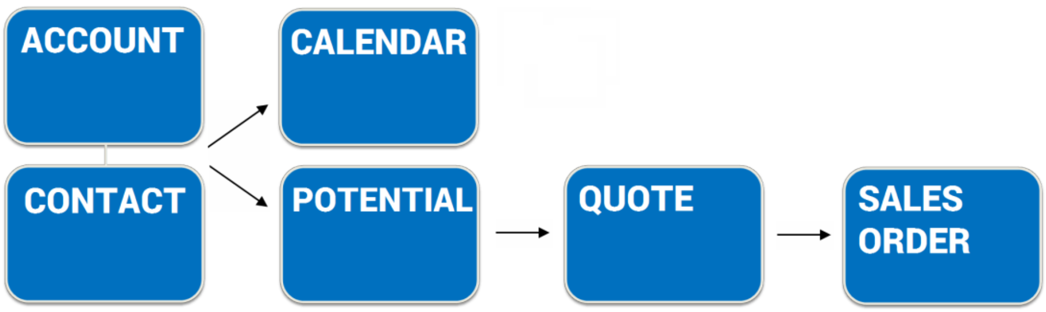
VTECRM can be easily integrate with well known solutions such as Exchange, Zimbra, Lotus Notes, Google Calendar, ERP and E-commerce software, social network, and more.

1.2 Main flows managed by VTE

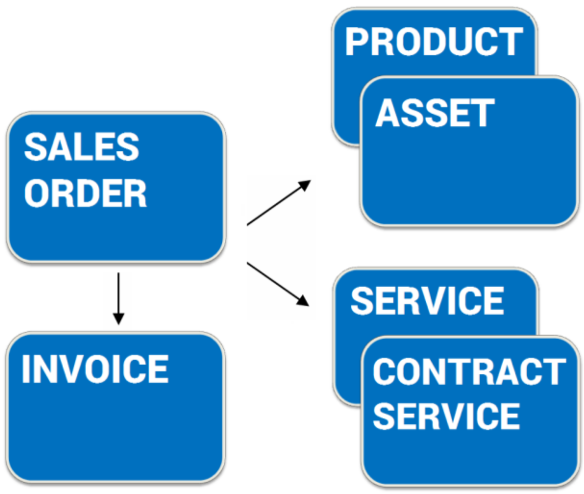
Customer acquisition



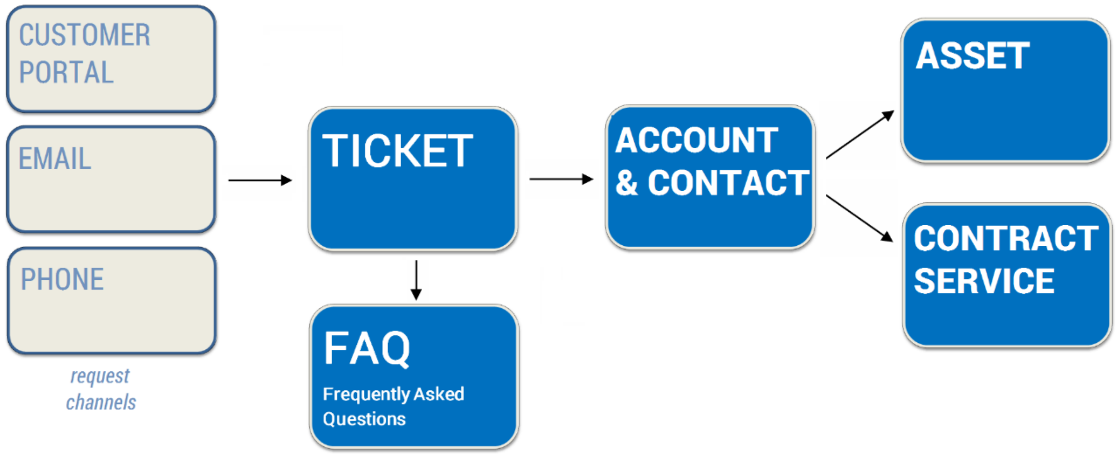
Sales



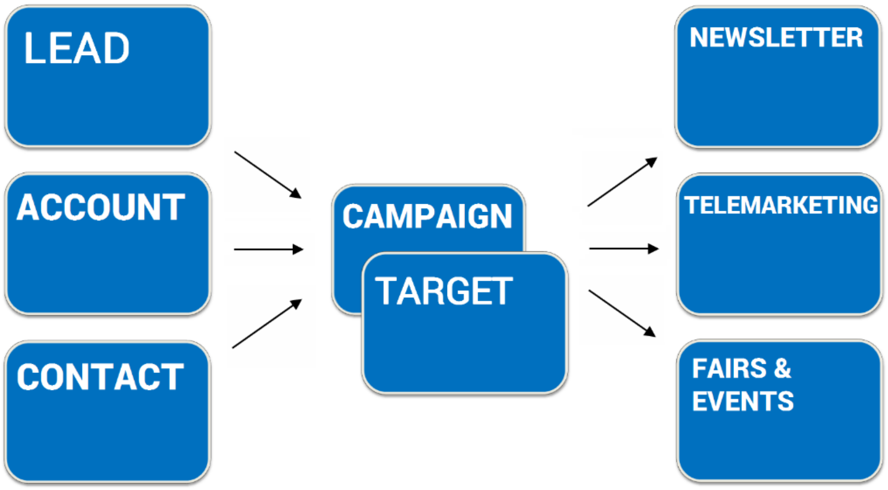
Post-Sales



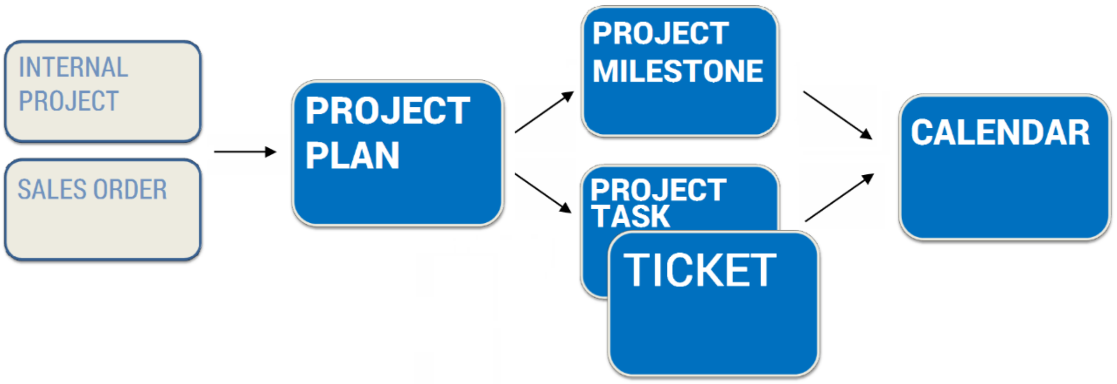
Customer Support



Marketing



Projects



1.3 VTECRM 15.05 Business release notes

VTECRM is available in two versions:

- **VTE Business**: Cloud and On Premise, always updated, for pricelist see www.vtecrm.com
- **VTE Community**: downloadable for free, with limited updates and features [**please note**: this Manual reports specific notes about the limitations]

What's new in VTE 15.05 Business.

- From this version on, the name **refers to the release date**, in this case May 2015.
- Tool for **tracking the activities**, with play/stop buttons: counting the time spent on customers, support, communication and other activities, and displaying it in the calendar
- Wizard for **creating calendar events** starting from the related object, viewing hours/days and placing the event through point and click
- **Translation button** for instant translation of emails via Google Translate
- **Preview button** for seeing email attachments without downloading: pdf, odf and common image formats are supported
- **Download button** for groups of attachments, which are downloaded in one zip file
- **Introduction of ics support**, to receive invitations via email and add events to the calendar
- Wizard for **creating new modules**: layout setting, relations with other modules, labels, ability to import/export modules, advanced sdk editor, and more
- Wizard for **importing data** from csv and database: dynamic table, sql query for advanced extraction, data conversion rules, scheduling, and more
- Improvement of **calendar settings**, more similar to the system general configuration
- Now it's official the **PHP 5.5 support***

***Please note!** VTE Community supports PHP 5.3

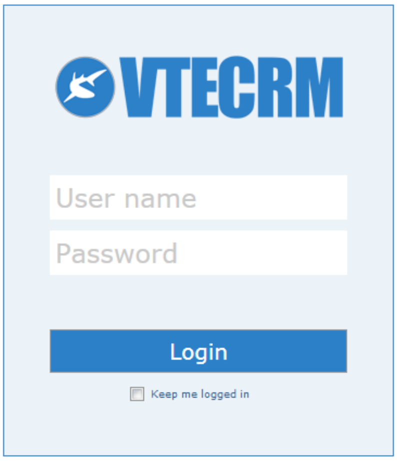
1.4 Notes about the Manual (Disclaimer)

The features and images displayed in this Manual (print-screen with icons and colors) could change according to: a) latest VTECRM updates, b) the VTECRM version you are using (Business or Community), c) the configuration of your VTECRM.
This Manual reports specific notes about the limited/different features of VTE Community.

2. First steps: how to browse VTECRM

2.1 Login

Access VTECRM entering your user credentials, then click *Login*.



According to the privacy law, the password

- must have at least 8 characters
- must not contain the user name or last name
- must be changed every 3 months (automatic alert)

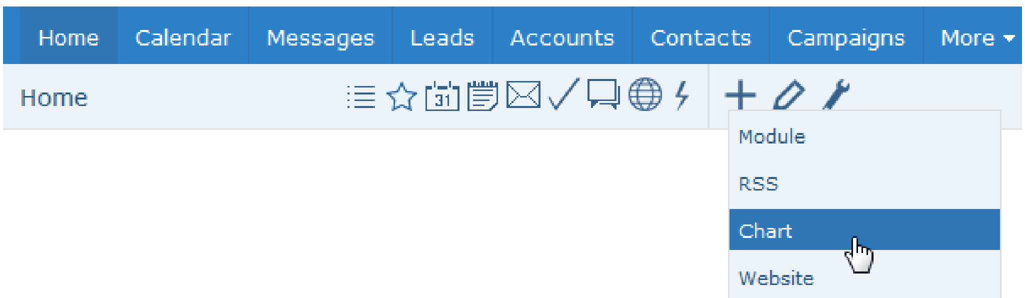
Click *Forgot your password?* to reset your user password following the process (until 24 hours, otherwise you have to repeat the process).

Please note: after 5 attempts to login with wrong user/password, the system applies a security block on the IP address, avoiding further login attempts. The VTE user receives a notification by email. The Admin user can restore the IP through Settings > Users Login.

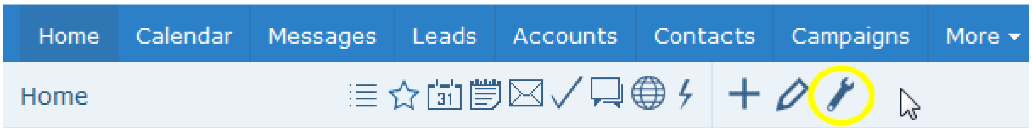
2.2 Home Page

Accessing VTECRM, the user lands on its Home Page (option which is editable from User Preferences). The Home shows summaries, abstracts, lists and graphs related to the CRM content. You can choose what you prefer to see through Settings, and in which order (drag & drop); you can add default or customized dashboards (Reports and Graphs).

To add a new block to the Home Page, click the button + and choose it. Then follow the procedure.



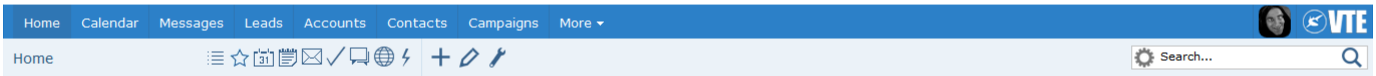
To enable or disable a default component click and jump to *Home Page Components*.



Upcoming Activities	Upcoming and pending activities related to your calendar
Planned Activities	Activities not carried out
Top Accounts	List of your best accounts. The content of this list is generated by connecting open potentials (Potentials module) and companies (Account module)
Home Page Dashboard	Customized graphs available on the Home Page
Top Potentials	List of the most important open potentials
Top Quotes	Best quotes, classified by their amount
Key Metrics	Summary of the total number of records in the lists you have created. For example: if you create the list “Hot Leads”, in this box you see the total number of this type of Leads
Top Trouble Tickets	List of tickets (Trouble Tickets) assigned to you or a group you belong to
My Group Allocation	List of the activities/modules assigned to the group you belong to
Top Sales Orders	Best sales, classified by their amount
Top Invoices	Open invoices, classified by their amount
My New Leads	Last created Leads
Top Purchase Orders	Best purchase, classified by their amount
My Recent FAQs	Link to the latest FAQs posted on VTE
Help VTECRM	Link to VTECRM manuals
Talks	Conversations between users

2.3 Browse VTECRM: menus

You can browse VTECRM through two different menu, blue and light blue (the colors could change according to the user preferences). From the blue menu you access to all the VTECRM modules (listed under *Areas* and *More*).



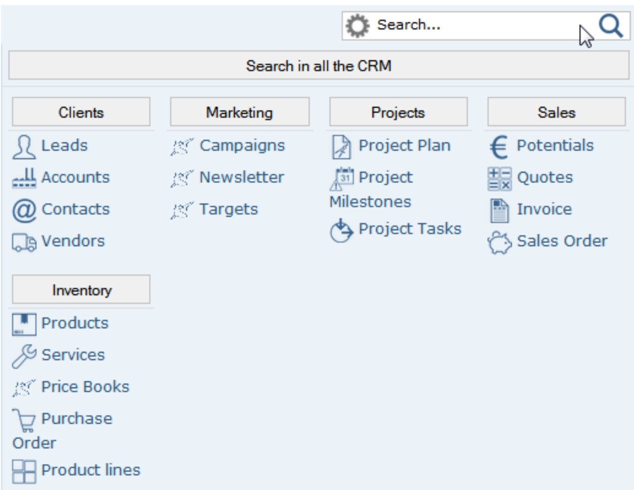
What is a module? It is a container of a specific kind of data. Accounts, Orders, Tickets, etc, are different “drawers” in which you place information. Each user could see and access only the modules allowed by Admin.
The light blue menu shows the tools icons: some are fixed and some changes according to the module you are in. On the right side you also find the Preferences, the Sign-out button and the global search tool.

2.3.1 Global search

You can search a word between the modules or within a specific area/module. The result is shown in a new window.

The character % can be used as a jolly. For example, enter "Ros%ti" if you want to search two contacts named "Rosetti" and "Rossotti".

***Please note!** VTE Community: the research tool is different (without areas).



2.3.2 Fixed icons

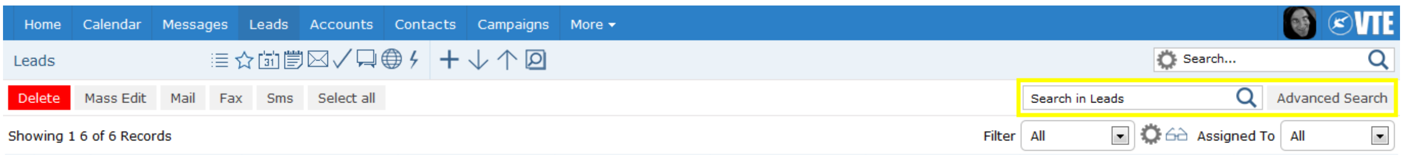
- Last Viewed
- Favorites
- Calendar *Please note! VTE Community does not include this tool.
- Notes *Please note! VTE Community does not include this tool.
- Messages
- To-do
- Talks
- Notifications
- Quick Create

2.3.4 Variable icons

- Create a new record for the module you are in
- Calendar settings
- Settings
- Import data
- Export data
- Find duplicates

2.3.5 Search within a module

Another search tool allows to search in module you are in. The result disappears if you refresh or exit the page. For saving a research, see Filters.



The search always works for the columns and the records displayed by the filter. To expand the search to more fields, click *Advanced Search*. It allows to:

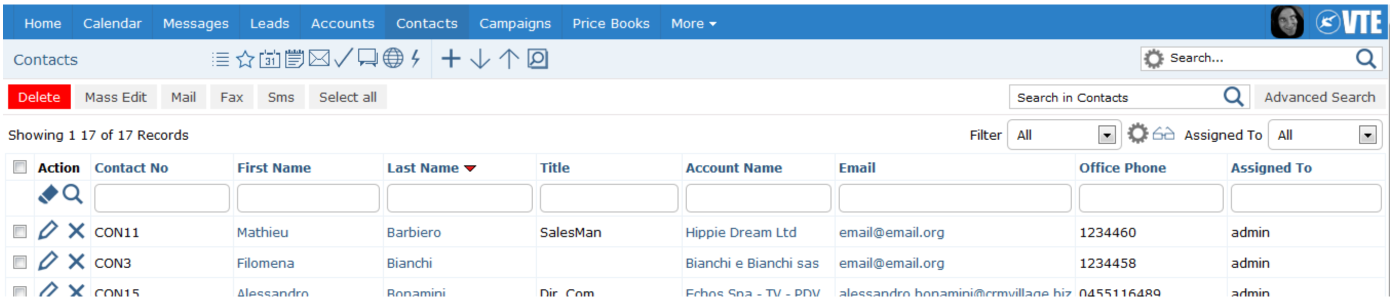
- choose any field of the module
- choose multiple search conditions and relate them with "and" (to include: *Match all of the following*) or with "or" (to exclude: *Match any of the following*).

The search works always within the displayed filter.

2.4 Structure of the modules

VTECRM works with modules and the relations between them. Every module has two main views.

1. **List view**: it shows the list of records contained in the module.

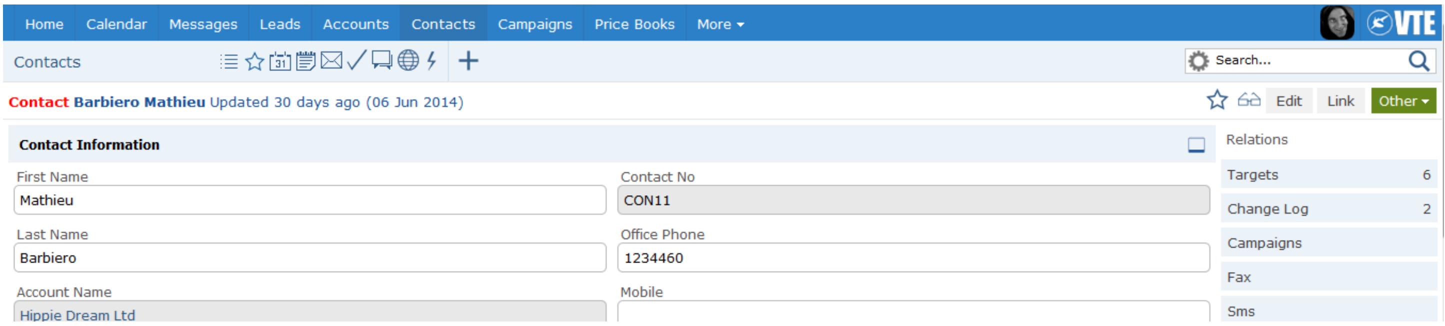


The available actions from this view are:

Delete	Delete one or more selected records
Mass Edit	Make mass editing on selected records
E-mail	Send mass-mail to selected records
Fax	Send fax in a massive way
SMS	Send sms in a massive way
Select all	Select all the records in the module or in the applied filter
PDF Export	Massive PDF creation (PDF Maker)
Filter	Define specific view conditions
Assigned to	Quick filter based on assigned users
Count	How many records are displayed per page (located on the bottom of the page)

Note: Reports and Documents modules are organized by folder with a different default view. Through the *List* button you can switch to the list view.

2. **Detail view**: it shows the record with all its information (fields). To open it, click the name of the record in the list view.



There are some actions (*Edit, Link, Other*) available on this view.

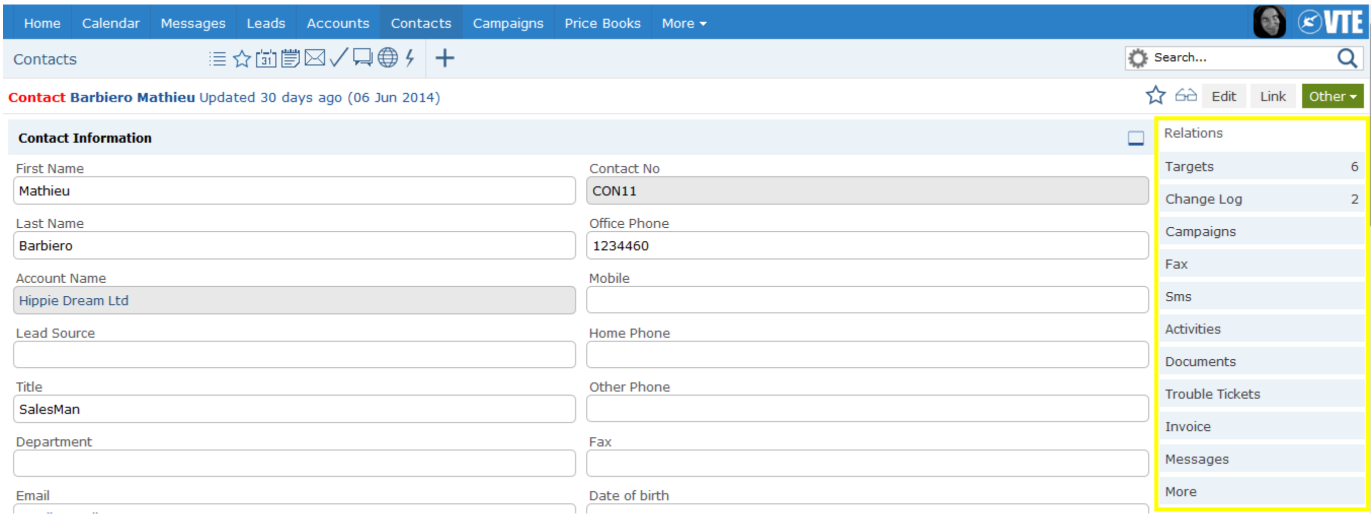
Add to Favorites

Notifications (enable/disable personal notifications if the record changes).

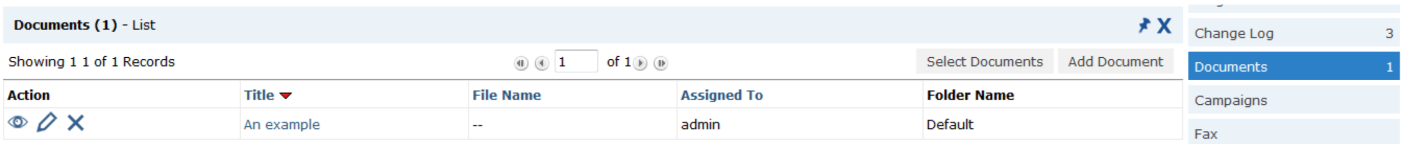
2.4.3 Content of the record

The record (for example a Contact) is divided into two parts.

1. **Fields of the record**: default and customized fields containing information. Click to open the whole record.
2. **Related content menu**: allows to move quickly to other modules containing data that are related to the record you are in.

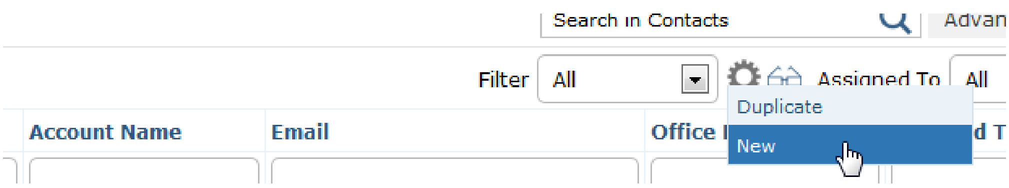


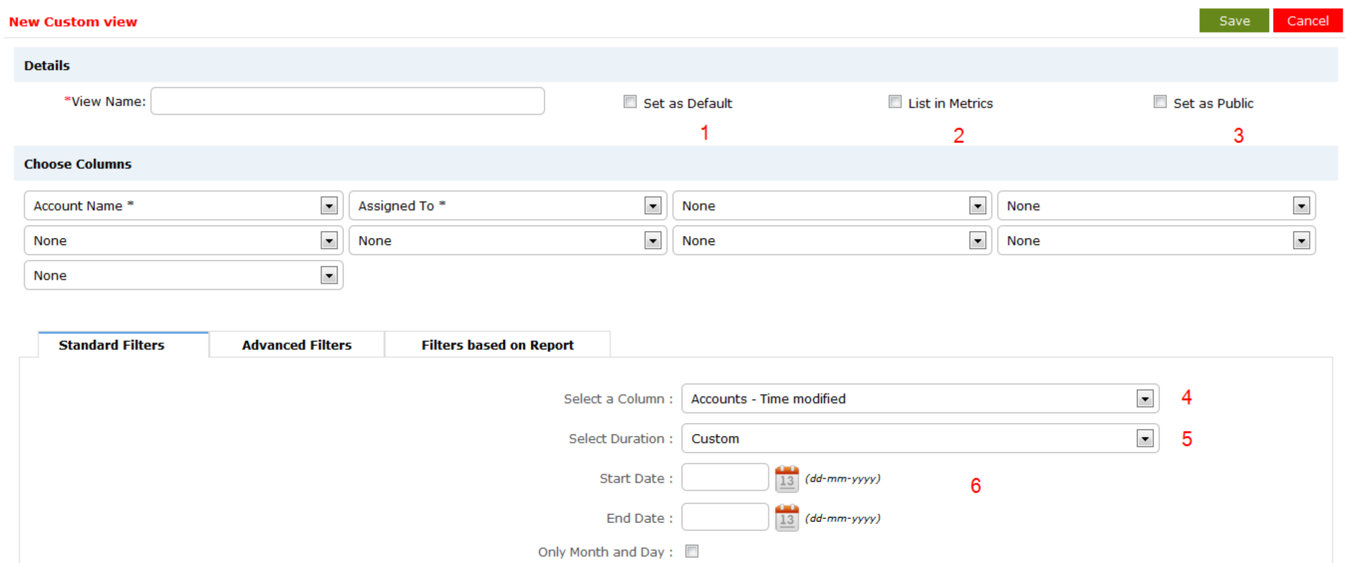
Clicking on a relation, the panel opens on the bottom of the page. From here you can read the history, add a new related record or link an available one. For example Documents:



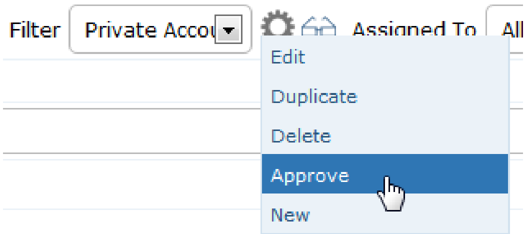
2.5 Filters

Filters make easy to find any VTECRM content. Create a list means to have at hand a saved search to access when needed. Lists could be shared with other users (if approved by Admin) and are also the basis of Targets.
Add a new filter and configure it as following.





1. *Set as Default:* if you want to see the filter automatically every time you access the module
2. *List in Metrics:* you can modify the list from *Key Metrics* in the home page
3. *Set as Public:* if you want to make the filter accessible to other users (after being approved by Admin)



4. *Select a Column*: select a Date type field to make a selection based on time
5. *Select Duration*: you can define the period of time for the previous field
6. *Starting/ending Date*: automatic (based on the previous option) but editable
7. *Initially order result on*: ascending or descending order by the selected field

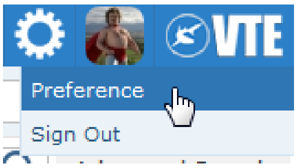
In the *Advanced Filters* section you can select one or more fields as the filter keys (for example: *City = London*).

Notes on operators:

- *equals*: makes a character-character control; the value must be the same of the term of comparison contained in the filter; it's case sensitive, it recognize capital and small letters
- *contains*: less restrictive then "equal"; the value must be the same text of the term of comparison, but it does not recognize capital and small letters.

In the *Filters Based On Report* section, you can extend the filter possibilities through a report (see Reports).

2.6 User preferences



Main preferences:

- **User Login & Role**: change password, login via LDAP (if available), select the currency, the landing module after login, the theme, the language, the notifications (via email or in VTE)

- **More information about the user**: enable Internal Mail Composer if you want to use VTECRM to send e-mail

- **Calendar configuration**: see Calendar

- **Asterisk configuration**: VTE can be integrated with Asterisk for calls

Asterisk Extension	If VTECRM is integrated with Asterisk you have to enter here the extension (ex: SIP/111). For more information about VTE-Asterisk integration ask to CRM administrator
Receive Incoming Calls	Select it if you want to enable the recognition of incoming calls

- **Home Page Components**: select which tools to see in your Home Page

- **Notification settings**: select the modules for which you would like to receive notifications (related to records assigned to you; this rule follows the Roles/Profiles hierarchy)

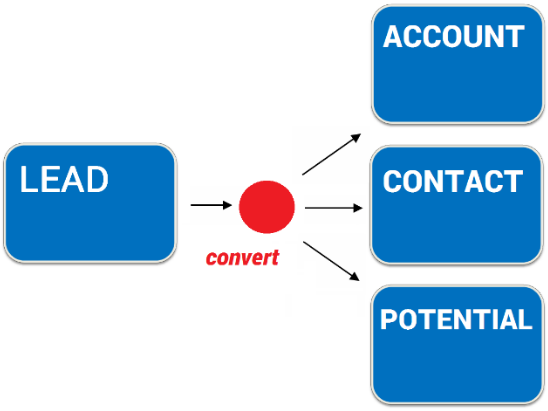
3. Customer Management

VTECRM makes a distinction between three types of contacts:

- Lead: a potential customer
- Account: company or business name (they could be actual customers, dead customers, partners, resellers…)
- Contact: the person you talk with (he/she represents a company)

3.1 Leads

You can imagine a Lead like a business card you pick up from a marketing activity. You have to keep track of all Leads and the sources they come from (different marketing activities), check their interest in your products/services and then start a negotiation (Potential). At this point, you can convert the Lead into the next steps of the customer cycle:



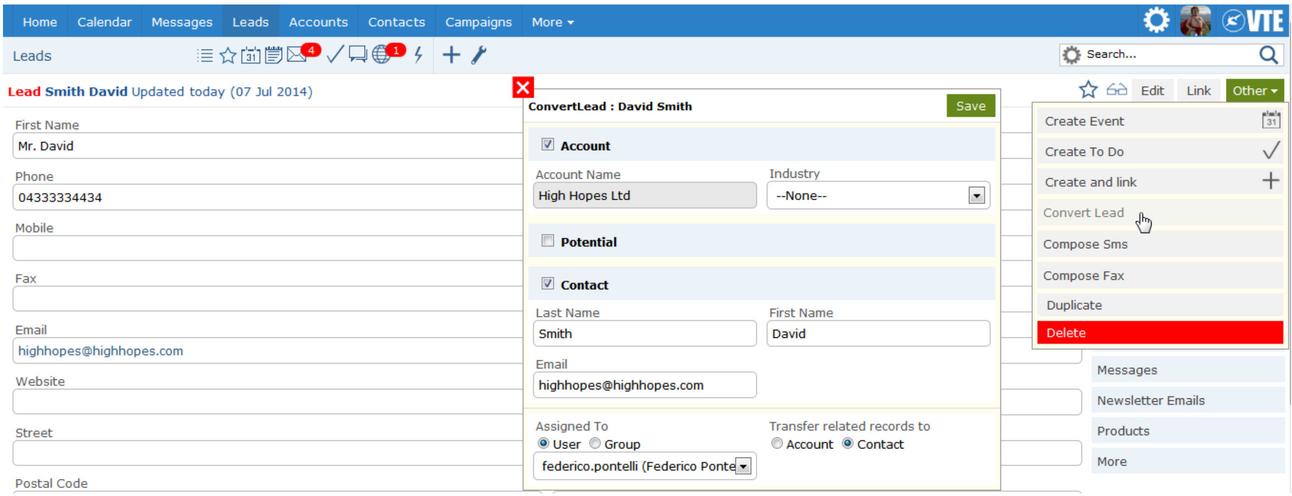
All the Lead's information, after its conversion, are available in the other records (be sure that the customized fields are mapped correctly, otherwise the information will be lost; see Layout Editor).
To create a new lead, click +
Within the Lead record (detail view) you have to enter the information you know about him/her and the company.

First and Last Name	Name and surname
Company	Name of the company
Title	Lead's role in the company (example: Holder, Director…)
Lead Source	Channel through which you got the lead
Assigned to	User or group of users that has to manage the lead

A new lead is automatically assigned to the user who is creating it. To assign it to someone else, just edit the field *Assigned to*.
Fields with red asterisk are mandatory, but the administrator user can change this feature.
Once saved, you can start adding activities, emails, documents, campaigns, etc, through the related content menu.

3.2 Lead conversion

When a negotiation starts you have to convert the Lead, because only Accounts/Contacts allow to relate Potentials, Quotes, Orders and so on. Click *Other > Convert Lead*.



The conversion panel allows you to:

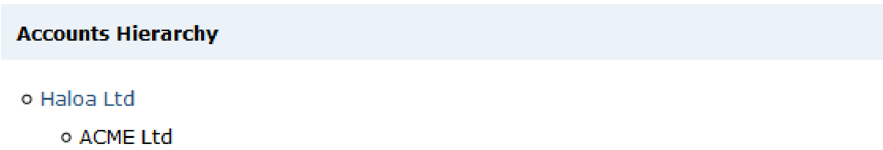
- generate an Account, a Contact and/or a Potential
- enter some mandatory data for Potential: name, expected closing data, sales stage, amount
- decide to move the Lead's attachments (email, activities, documents…) to the new Account or Contact

3.3 Accounts

The Account module contains the company data, such as the type (new potential, actual customer, dead customer, partner…). To create a new empty Account click +

Account name	Company name
Member of	Allows you to create a hierarchy between companies by relating the company to an existent one
External Code	Code from other applications
Assigned To	User or group of users that has to manage the account

The field *Member of* allows to create a company hierarchy, for example in case of a group with an headquarters and branches.
The hierarchy (with links to related Accounts) is shown on the bottom of the record.

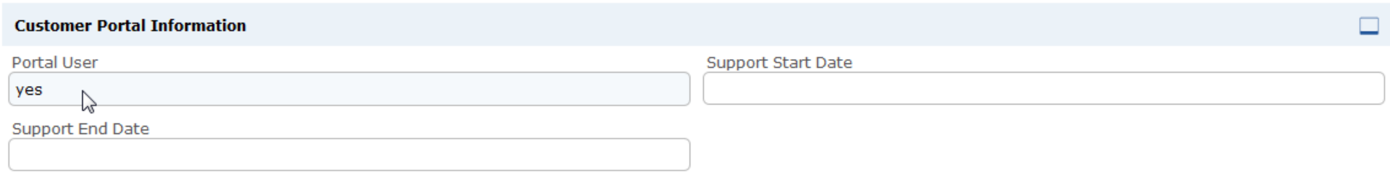


3.4 Contacts

The Contacts module contains personal data such as company referents and private customers. Like the Account, the Contact can be created through a Lead conversion, or by adding it from the Account record, or creating it independently with +

Reports To	Report to an higher rank name in the company, to which the contact is related (ex: add a new contact via word of mouth from another contact)
Do Not Call	Select the box if you don't want to call the contact
Email Opt Out	If selected, the contact receives notifications via email if the data change
Portal User	Enables the contact to access the VTECRM Customer Portal
Support End Date	Expiration date to access the Customer Portal

The Customer Portal provides the contact with an online area for support service. If you enable it, VTECRM sends automatically an email to the contact with its access credentials.
To set and edit the email template, go to *Settings > Email Templates > Registration* and access data.

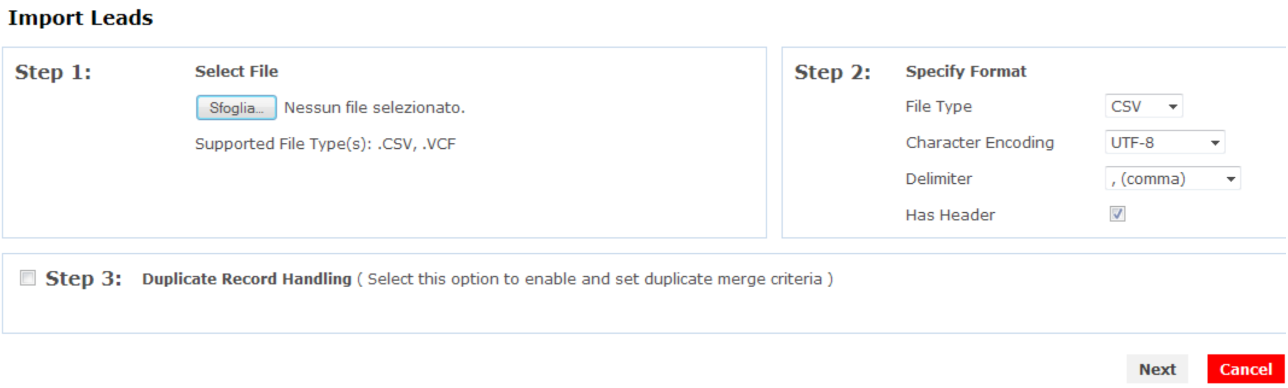


3.5 Import, Export and other tools

In the Leads, Contacts and Accounts modules (but also others) you find two buttons for import and export: .
Note: We recommend to check if there are duplicates (data already contained in VTE) before starting the upload.

3.5.1 Import

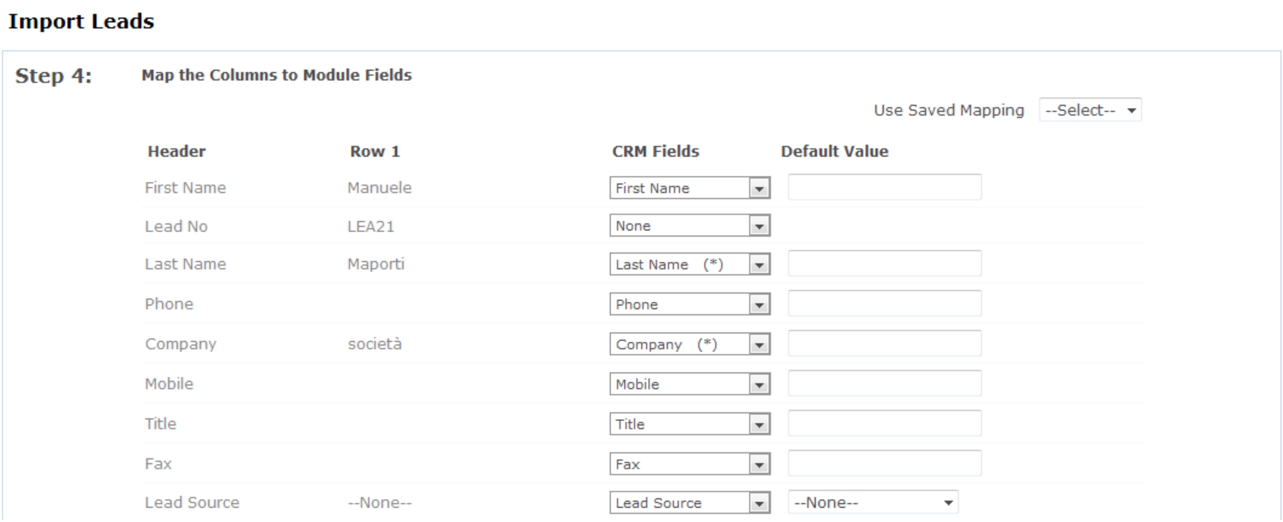
Click to start the upload and follow the steps.



1. select the CSV file you want to import
2. select *Has Header* if, in the CSV file, the first line is the header of the data table
3. choose Delimiter between , or ;
4. choose the type of character encoding: UTF-8 (base character encoding, doesn't include special characters) or ISO-8859-1 (extensive coding)

Note: We recommend to import max 950 rows per file; if your file is bigger, just split it into two or more files with no more than 950 rows each one.

5. Define how to manage duplicates:
    a. *Skip*: if there are duplicates, data already in VTECRM are maintained
    b. *Overwrite*: if there are duplicates, the existing ones are deleted and new ones from the CSV file are created (in other words, the CSV data are maintained)
    Note: the links between leads and calendar, email, etc. in VTECRM will be lost. If you want to keep them, select *Merge*
    c. *Merge*: if there are duplicates in VTE, these are merged; the newest data are considered valid. If the CSV fields aren't empty, they are overwritten. Links between modules are maintained
6. Select the key fields for duplicates
7. Now you have to match the CSV fields with the VTECRM fields. It is necessary to match at least the mandatory fields (marked with *)



- CRM Fields: select the destination field in VTECRM
- Default Values: set the default value to import if it is empty in the CSV file

Note: You can save the custom mapping for the future, flagging the box and naming the mapping.

8. Click *Import* to transfer your data in VTECRM and wait until the process is completed.

3.5.2 Data format

Data must be in ASCII format with comma-separated values (CSV). Format CSV is often used to exchange data between different applications.
The data you want to import must be formatted as explained:

- All the comma-separated fields must be in quotation marks.
- You have to include all the required fields (ex: last name and company in the case of Leads).
- Fields with dashes and spaces are not allowed.
- In the number fields punctuation is not allowed (for ex: write 3800 but not 3,800).
- Use the dot as decimal separator.
- Quotation marks create a problem with the field. If they are necessary, put them between round brackets.
- To import date type fields is recommended to use the USA format: yyyy-mm-dd.
- To import values in multi selection fields you have to use this format:
  value1 |##| value2 |##| value3
- The field headers have to be in the first line.

In the figure, the example of a lead import: each line is a data set.

```
" Company" , "Street" , "City" , "Postalcode" , "Country", "Phone" , "Lastname"
"SampleInc" , "Samplestreet 123" , "Samplecity" , "12345" , "Germany" , "(123) 45678" , "Miller"
"Xyzcompany" , "Xyzstreet 321" , "Xyzcity" , "54321" , "Germany" , " " , "Jane"
```

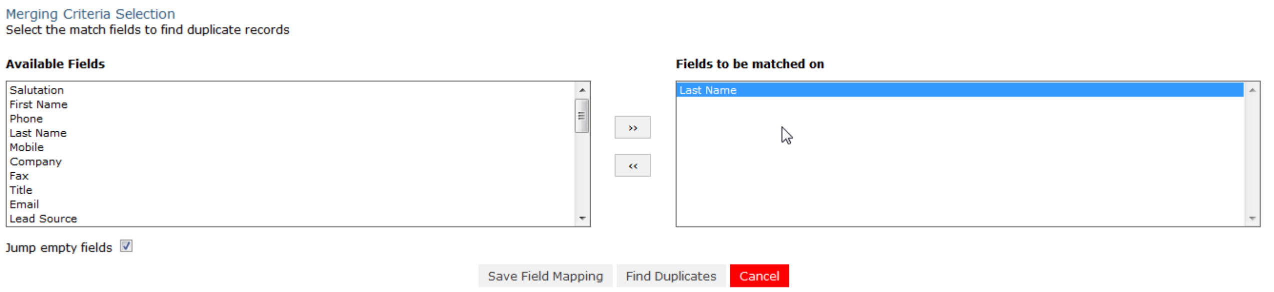
3.5.3 Export

Click and the following panel appears.

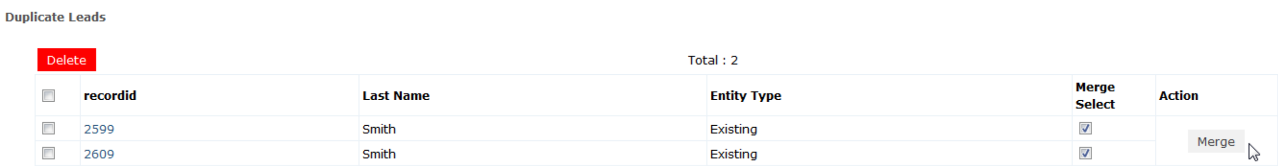
You can choose to export the selection of records that you prefer, choosing one of the options.

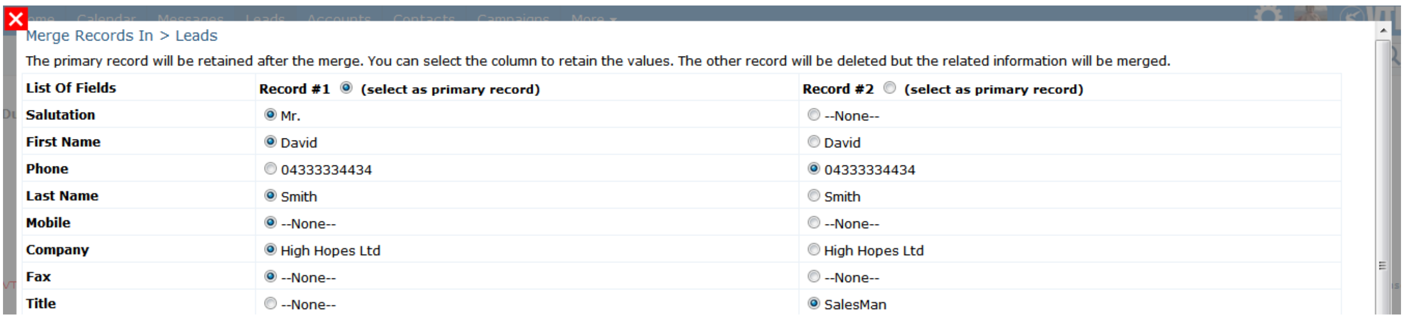
3.6 Find duplicates

To find duplicates, click and select the key fields for searching the duplicates (example: email or ID number).



It is possible to merge the records (max group of 3 records). The figure below shows how to normalize and merge duplicates by selecting the valid values.





Notes:

a) in every module there is the Find Duplicates button
b) the selected record is maintained after the merge
c) the new record maintains all the relations

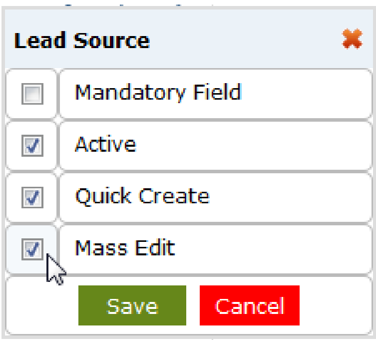
d) you can allow some users to use the merge tool

During the creation of a new record, each user can activate on each module a control of uniqueness. Click the button and select match fields, then click *Save field mapping*. Whenever you modify or create a new record, VTECRM will check if there is an existing record with the same fields combination.
For example: VTECRM alerts you if you try to save a new lead with the same first/last name of an existing one.

3.7 Mass Edit

Useful tool for updating many fields quickly. For example: if you add a new customized field in Contacts and you have to update the whole Contacts database, you can do it through Mass Edit avoiding to open each record manually.
You find the Mass Edit button in all the modules. Once saved, all the changes are applied to all the selected records.

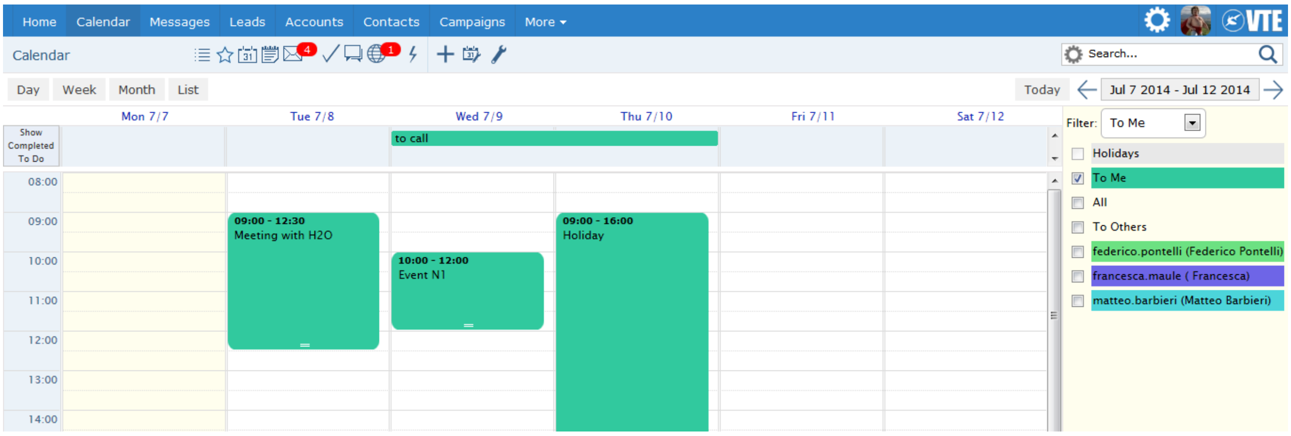
Note: Not all the fields are available in the mass edit function, but you can modify this privilege in *Settings > Module Manager > Module > Layout Editor.*



4. Calendar and activities

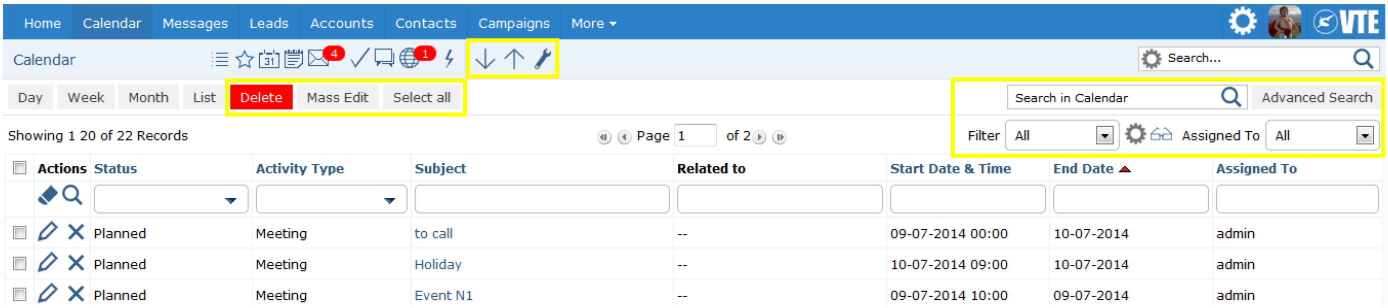
The Calendar module allows you to organize your day-to-day agenda, defining priority, involved contacts/users, access the related records in one click, save the activity history per customer(or ticket, or opportunity…), share an activity with your colleagues and close it when it is done.
VTECRM makes a distinction between two types of activity:

- Event: has a starting and closing date/hour, and it might involve other users or contacts. It can be a call or a meeting or whatever: the administrator can add any kind of event.
- Task: it's spread over many days, it's a specific activity but it hasn't a starting/ending time.



Click *Show Completed To Do* to see completed/not completed tasks. Click the bar to enlarge this area.

If you want to see all activities listed together, click the button *List*. You can customize the list as you prefer (Filters). The List view allows you to work on the calendar through the common tools (*Select, Mass Edit, Delete, Search…*).



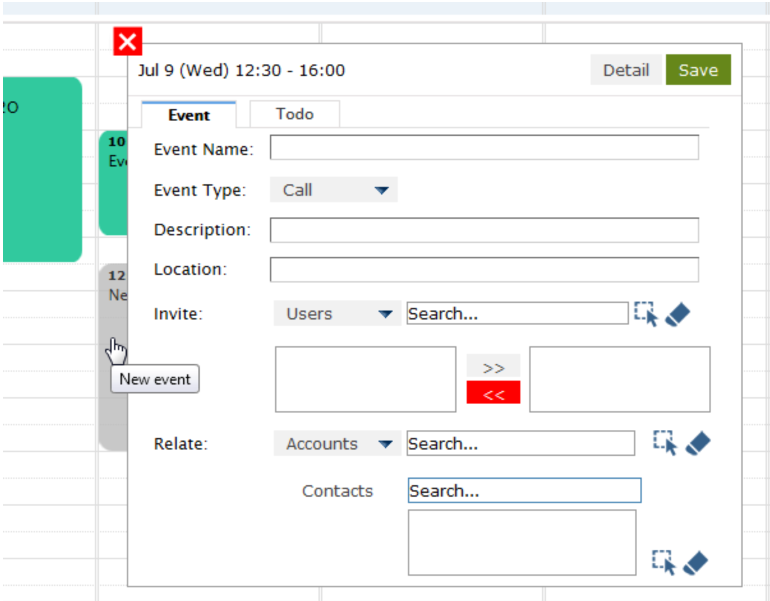
4.1 Add an event

To create a call, meeting or whatever click + and enter the main information:

Event Name	Enter a name for the event
Event Type	Select the type
Description	You can add a small description
Visibility	You can choose between Public, Private, Standard
Status	As default the status is Planned, but you can change it

Priority	Choose the priority level
Assigned to	As default the event is assigned to who creates it, but you assign it to another user
"Event starts at" and "Event ends on"	Each event has a begging and an end; it can last for more than one day
All day	Select if the event lasts the whole day

You can also click directly on the calendar, in the day/hour you want to add the activity.



Click *Details* for more functions.

- ***Related to**:* You can link an event with data in other VTECRM modules.
- ***Invite**:* You can invite other users or contacts to the event. Contacts invited to the event receive an email with the details; they can answer if they are going to participate or not.
  Users invited to the event receive a notification on VTE; they can answer if they are going to participate or not; if yes they see the event on their calendar.
- ***Reminder***: You can choose to be reminded with an e-mail. For this e-mail you have to enter an hour and a valid e-mail address.
  Note: To send alert email you have to schedule the appropriate CRONJOB of the VTECRM server. See the CRONJOB chapter.
- ***Repeat***: VTECRM allows you to schedule events that recur regularly.

Note: Each user has his own calendar, that can be shared with other users, as explained in the user preferences (section Share Calendar with); you can access to settings from in the task bar.

4.2 Tasks (To Do)

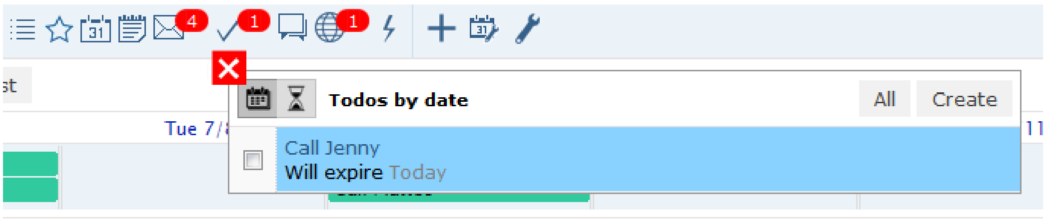
VTECRM helps you to schedule tasks and assign them to a user or a group of users. You cannot invite other users to a task, or relate more than one contact to it. Changing the holder, you transfer the task to another user.
You can add tasks from any record inside VTECRM (a contact, a potential, etc). Click *To Do* and, in the panel that opens, you can enter the task details.
From the Calendar click + and then *To Do*. You can add a task also clicking on the calendar.

To do	Enter a name for the task
Description	You can add a small description
Status	As default the status is Planned, but you can change it
Priority	Choose the priority level

Assigned to	As default the event is assigned to who creates it, but you assign it to another user
Time & Date and Due Date	Each task has a begging and an end; it can last for more than one day

Related to: You can link a task with data in other VTECRM modules.
The tasks are displayed on the Calendar bar named Show Completed To Do.

Note: You can view the list of open tasks from any point in VTECRM, you only have to click ✓ .



4.3 Calendar preferences and configuration

Through this icon the user can define his own preferences for the Calendar module.

Default Calendar View	Defines the default calendar view: Today/This week/This month
Data Format	Defines the data format for the user
Reminder Interval	How often you want to check calendar activities
Day starts at	Defines the start time of the day

From the section *Share calendar with*, you can decide with which users share your calendar. This feature is essential when the hierarchy rules do not permit to subordinates to see the calendar of higher roles.
Through the function Show calendar users, you can choose which calendars to see (from a list of available users). This choice defines the list that you see on the right side of the calendar.

To define the visibility/editing privileges of the Calendar, check how is set the *Shared Access > Calendar*:

- Private: the Calendar follows the Role hierarchy
- Public: read only
- Public: read, create/edit
- Public: read, create/edit, delete

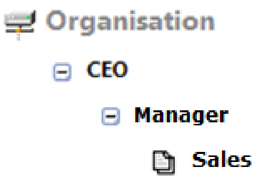
The single event/task, when you are creating it, shows the *Visibility* picklist:

- Standard: the event follows the Shared Access rule
- Private: the content is always private (not visible to other users)
- Public: the content is always visible

The combination of event visibility, Shared Access rule and Roles hierarchy defines the privilege of viewing and editing events for each user:

- Only commitment: other users see the presence of an event but can’t access its content
- Read only: other users can open the popup with title, description, link, etc, but they can’t edit
- Read and edit: as above, but they also can edit (not delete)
- Read, edit and delete: highest privileges

Examples.



- Manager user belongs to Manager role
- Agent 1 and Agent 2 users belong to Sales role

According to this hierarchy (see Roles for further details):

- Manager sees his own data and Agent 1 & 2 data
- Agent 1 and Agent 2 see and share their data

Calendar set as Pubblic: Read only

Event assigned to	*Event visibily*	*What the user can see/do*	*User*
MANAGER (higher)	Standard	Read only	AGENT 1 & 2 (lower)
	Private	Only commitment	
	Public	Read/Edit/Delete	

Event assigned to	*Event visibily*	*What the user can see/do*	*User*
AGENTE 1 (same role)	Standard	Read only	AGENTE 2 (same role)
	Private	Only commitment	
	Public	Read/Edit/Delete	

Event assigned to	*Event visibily*	*What the user can see/do*	*User*
AGENTE 1 (lower)	Standard	Read/Edit/Delete	MANAGER (higher)
	Private	Only commitment	
	Public	Read/Edit/Delete	

Calendario Pubblico: Lettura, Creazione/Modifica

Event assigned to	*Event visibily*	*What the user can see/do*	*User*
MANAGER (higher)	Standard	Read/Edit	AGENTI (lower)
	Private	Only commitment	
	Pubblico	Read/Edit/Delete	

Event assigned to	*Event visibily*	*What the user can see/do*	*User*
AGENTE 1 (same role)	Standard	Read/Edit	AGENTE 2 (same role)
	Private	Only commitment	
	Public	Read/Edit/Delete	

Event assigned to	*Event visibily*	*What the user can see/do*	*User*
AGENTE 1 (lower)	Standard	Read/Edit/Delete	MANAGER (higher)
	Private	Only commitment	
	Public	Read/Edit/Delete	

Calendario Pubblico: Lettura, Creazione/Modifica, Cancellazione

Event assigned to	*Event visibily*	*What the user can see/do*	*User*
MANAGER (higher)	Standard	Read/Edit/Delete	AGENTI (lower)
	Private	Only commitment	
	Public	Read/Edit/Delete	

AGENTE 1 (same role)	Standard	Read/Edit/Delete	AGENTE 2 (same role)
	Private	Only commitment	
	Public	Read/Edit/Delete	

AGENTE 1 (lower)	Standard	Read/Edit/Delete	MANAGER (higher)
	Private	Only commitment	
	Public	Read/Edit/Delete	

Calendario Privato

Event assigned to	*Event visibily*	*What the user can see/do*	*User*
MANAGER (higher)	Standard	Read only	AGENTI (lower)
	Private	Only commitment	
	Public	Read/Edit/Delete	

AGENTE 1 (same role)	Standard	Read only	AGENTE 2 (same role)
	Private	Only commitment	
	Public	Lettura /modifica/elimina	

AGENTE 1 (lower)	Standard	Read/Edit/Delete	MANAGER (higher)
	Private	Only commitment	
	Public	Read/Edit/Delete	

Regole generali per il Calendario privato:

Event visibility	*Users see the event*	*Users see the content*	*Users edit/delete*
Pubblico	yes	yes	yes
Standard	yes	yes	according to role hierarchy
Privato	yes	no	no

4.5 Import and export activities

To import or export activities from your applications, VTECRM provides the standard iCalendar format (extension .ics). To export calendar activities from VTE, select the records you want to export, click ↑ and follow the procedure. As well, to import click ↓.

VTECRM provides also the following integrations:
- Synchronization via Active Sync (extra plug-in)
- Synchronization with Exchange Calendar (extra plug-in)
- Synchronization with Google Calendar (extra plug-in)
- Synchronization with Zimbra (extra plug-in)
- Synchronization with Outlook via plug-in

5. Personal communication tools

The CRM aims to manage the relations between company and customers, therefore the communication tools have a great importance. VTECRM provides many tools for both the internal (your own work team) and external communication (with customers), and makes a distinction between personal and marketing communication.
In this chapter we will see the tools for personal communication:

- Messages module
- Email templates
- Talks
- Notifications
- Notes
- Documents module

The Message module is the internal email client, it allows to send single or multiple emails, and to archive emails into other CRM records.

5.1 Mail server settings (SMTP)

Configure the email service: *Settings > Mail Server > Mail Server Settings (SMTP).*

Enter the SMTP server data:

- Server Name (server address for SMTP access)
- User Name (usually the complete address)
- Password (your email password)
- Requires Authentication (pick)

Once saved, VTECRM makes a test, sending an email with the response to the admin. If the test is successful, server data are saved.
E-mail templates are a useful shortcut when you have to send mass emails to a list of selected contacts. You can customize it for each type of communication and reuse it any time you need.

5.1 Messages module

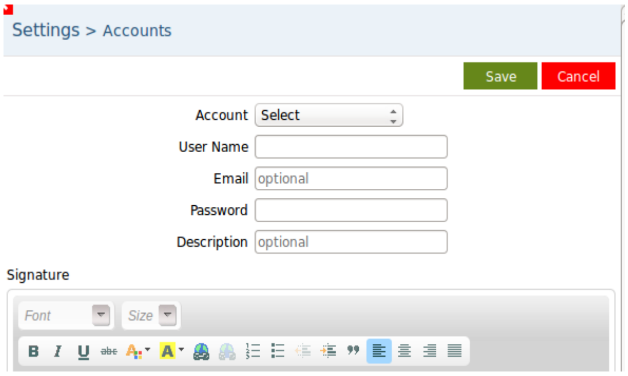
This module works with a main IMAP account, this means that you can work on emails through VTE as you are on the email server, avoiding the downloading of copies. Any action on Messages equals to the same action on the email server: creating folders, deleting emails, etc.

After the first account, you can configure secondary accounts that can be IMAP or POP3.

5.1.1 Configuration (IMAP)

Every user can set his mail configuration. You have to click . Than you can: set your accounts (you can have more than one), organize your folders, define your Messages module layout, create your personal filters and fetch mail from a mailbox POP3 in the IMAP account.
If you choose Accounts, than you have to set your data to use your IMAP account:

- Account (IMAP server)
- User Name
- Email
- Password
- Description

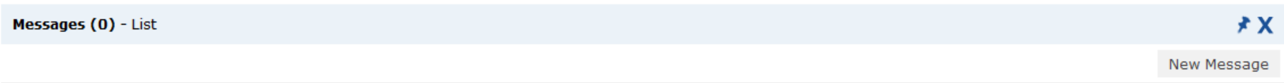


The Account field can refer to a mailbox which server is the same entered in *Settings > Mail Server Settings > Server Name*. You can also choose *Custom* and enter yourself the credentials needed.

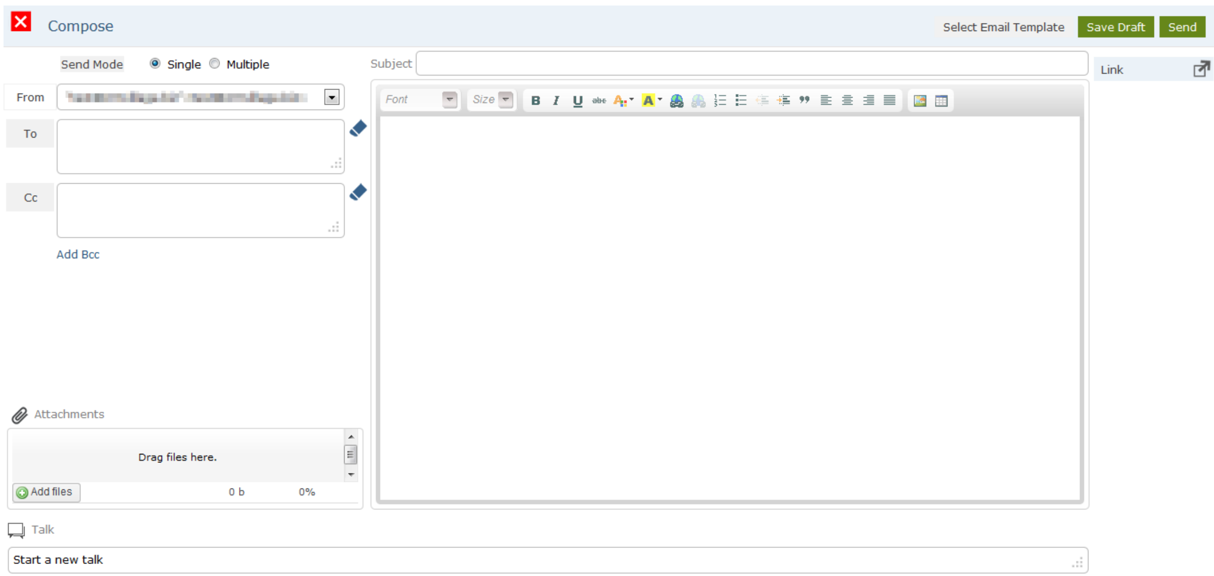
5.1.2 Read and write emails

You have different ways to send an e-mail.

1. Click from the task bar.
2. Click on the email address (from anywhere in VTECRM).
3. Click *Add Email* (in the modules in which is available).



In any case, the Compose Email panel opens.



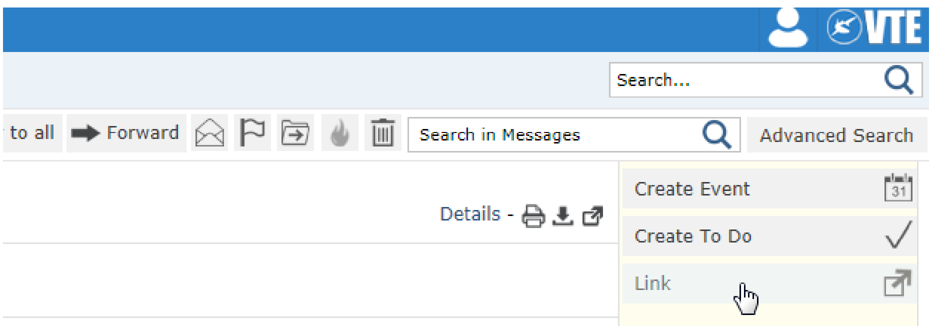
To	The recipient(s): you can write the name and/or select it from a list (Leads, Accounts, Contacts, Vendors and Users)
CC	Carbon Copy: email address to which send the copy of the email
Add BCC	Blind Carbon Copy: hidden address (recipients can't read it)
Subject	Subject of your email
Attachments	Add an attachment through the button *Add Files*, or just drag files in the area on top right of the panel
Send Mode	Single: send a unique email for everybody Multiple: send an email for each recipient in To:

To select a template for the email, use the button *Select Email Template*. At the end click *Send*.
Note: VTECRM saves automatically not-sent emails in Drafts.
The signature: VTECRM stores your standard email signature and automatically add it in your messages. The signature has to be entered in: *Messages >* *> Accounts > Edit*

5.1.3 Email functions

	Compose a new email.
	Update mail server.
	Personal Settings. Click on this icon to set your accounts and preferences.
	Mark the message as read / unread.
	Mark Message as important.
	Move email to another folder.
	Mark as spam.
	Delete Message.
Translate Message	Open Google Translate for an immediate translation of the email
Download all	Download all the attachments in one .zip file
	Download the single attachment
	Archive the attachment as VTE document / Open the document record
	Link the document to other CRM records
	Preview of the attachment (supported formats: odt, pdf, common image formats)

Through the *Link* button you can relate e-mail to specific record within many VTECRM modules.



As default VTECRM searches records in the CRM. You can also add a new record (for example a new account) just clicking the +.

Once linked, in the email list you find a new symbol which indicates the existing connection: . The linked email are archived and always available within the related record, as well as if they are delete from the Messages module.

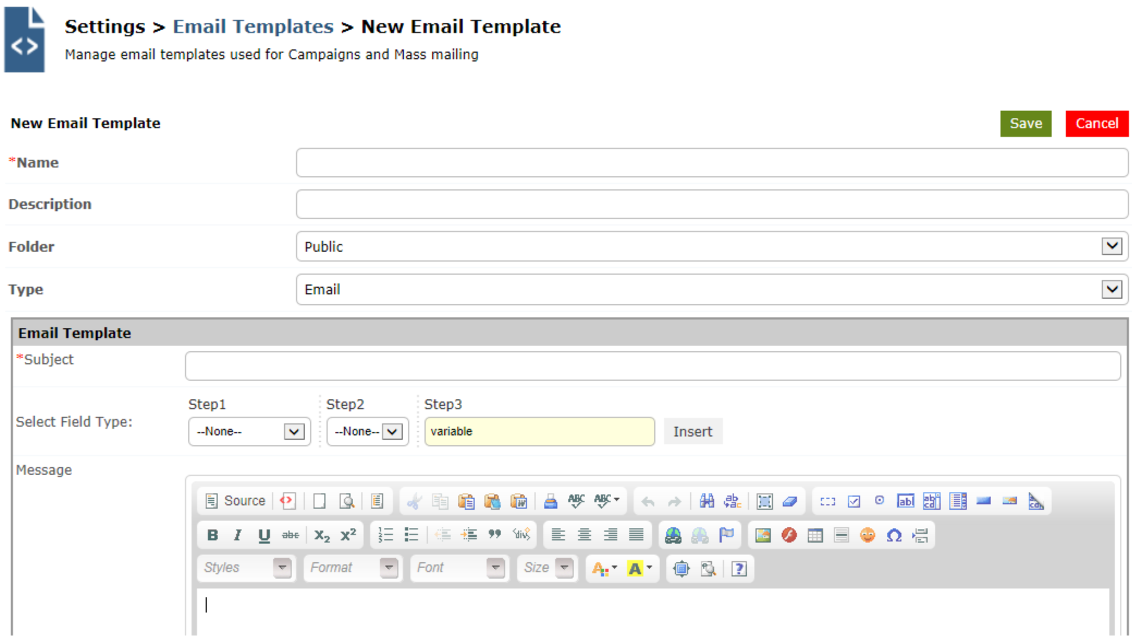
5.1.4 Email templates

The administrator user can create email templates for other users. Go to *Settings > Email Templates > New Template*.

Name	Template name
Description	Template description (purpose, content, etc)
Folder	Public: the template is available for all users Personal: the template is available only for admin
Type	Email: template available for Email Newsletter: template available for Newsletter
Subject	You can write a subject for your template
Message	Fill out text and graphic

You can also add variables in your template.
For example: you need a template for the new leads, to thank them for contacting you. Within the text, you have to insert a variable that generates automatically the first and last name of each lead of the list.
Act on *Select Field Type* as following:

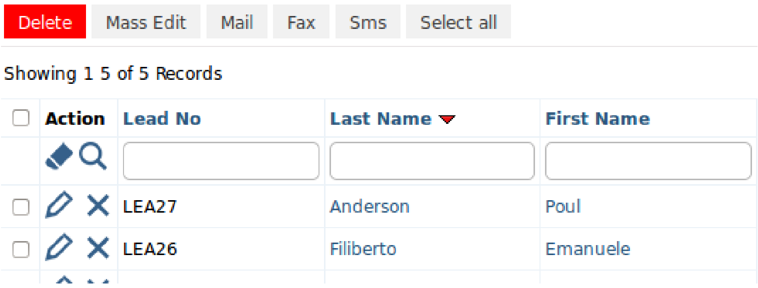
Step 1: select the module that contains the variable (in this case, Leads).
Step 2: select the variable (first name).
Step 3: click *Insert* and the variable is placed in the text, wherever you want.



Note:
If you send a template with Leads to a Contact, the variables do not appear. You must have a specific template for a module.
It is better to inform VTECRM users for which modules there is a template. Just write it in the description or template name.

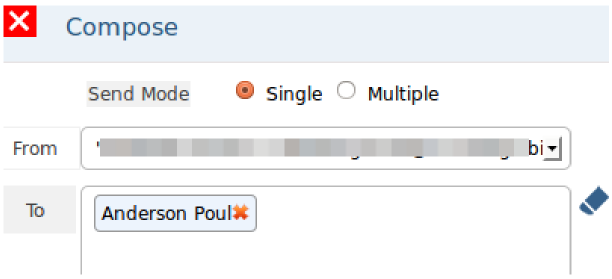
5.1.5 Mass Mail

To send mass email to lists of records (contacts, accounts, etc), in the list view of the module pick the records and click *Mail*.



Select the email IDs.

Then the composing window opens: the recipients are already set (from the previous selection). You can choose a template, and finally send the mass email.



Note: Check the Send Mode.

- Single: it send a unique email, recipients are able to see each other
- Multiple: send an email to each recipient, they can't see each other

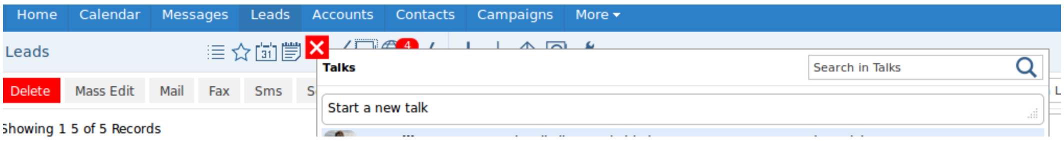
It is recommended to use the mass mailing when the number of recipients is limited.

5.1.6 ICS support for calendar

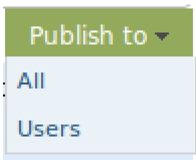
An ICS attachment is recognized as the invite to an event, therefore it automatically generates a calendar event which is already linked. You are asked to confirm your participation.

5.2 Talks

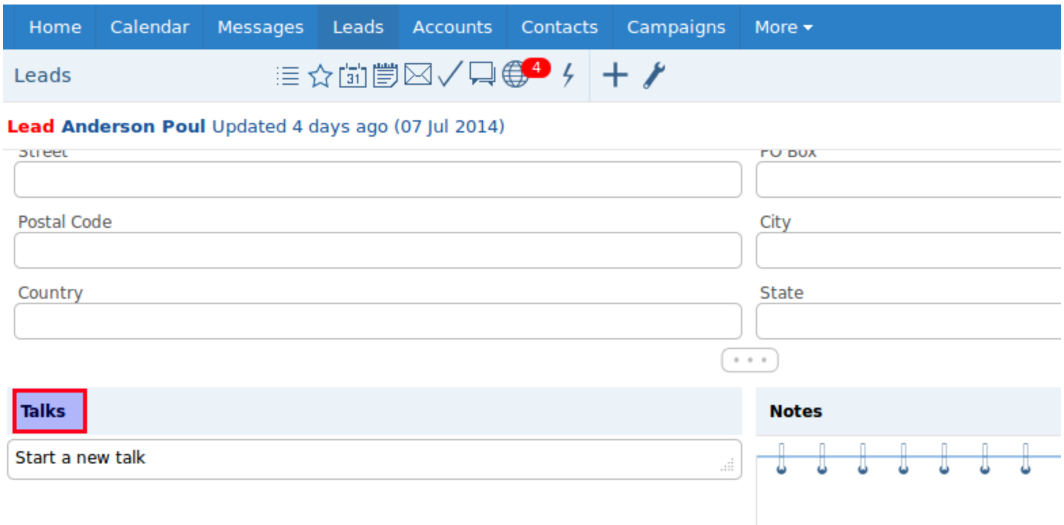
With the Talks module, VTECRM provides you a smart tool to manage the internal communication, minimizing the use of email among colleagues. To read conversations and start a new one, click .



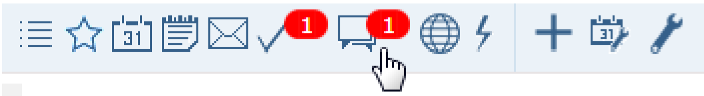
Click *Publish* and choose if you want to publish the message to all the VTECRM users or only to someone.



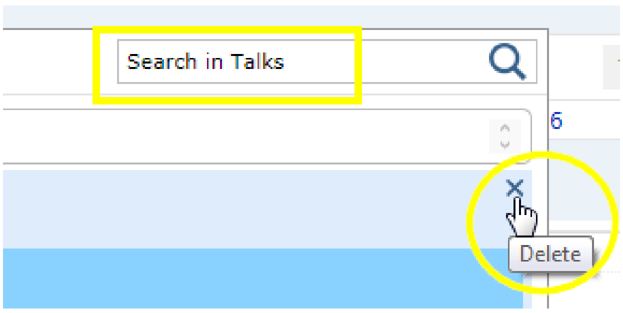
If you choose Users, a new panel allows you to select their names.
With the Talks module it's possible to create a conversation about a specific topic, for example a lead, relating the conversation directly to the record (as you see in the figure).



If there are new talks that involves you, near the Talks icon appears a red button with the number of the open talks. You just have to click and read the messages.



A user is able to delete only his messages/answers through the button X. You can also search words.



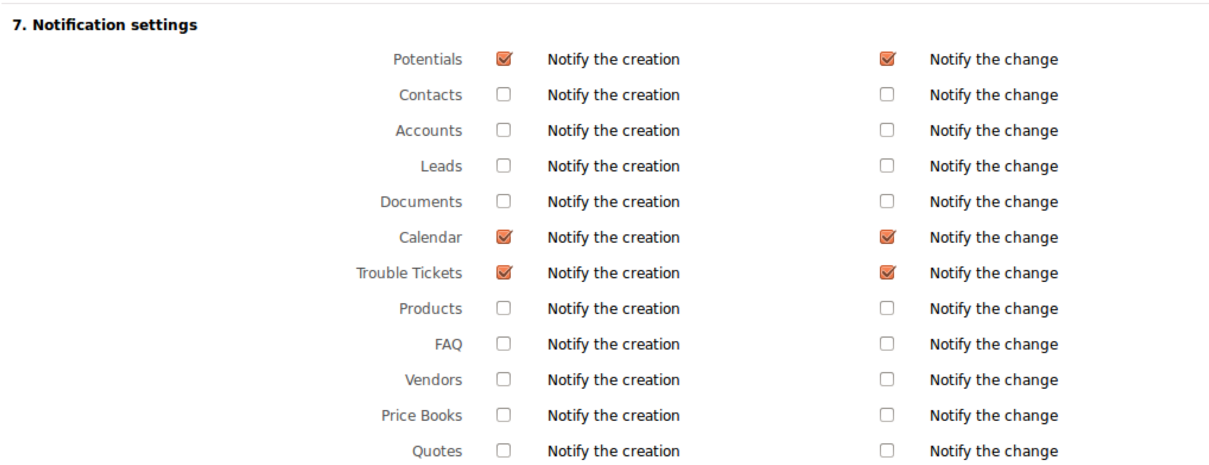
5.2.1 Talks privileges

Not all the users can add public talks (viewable to all users) or generic talks (not related to any VTECRM record). The administrator can define these privileges, from: *Settings* > *Users* > Editing user…

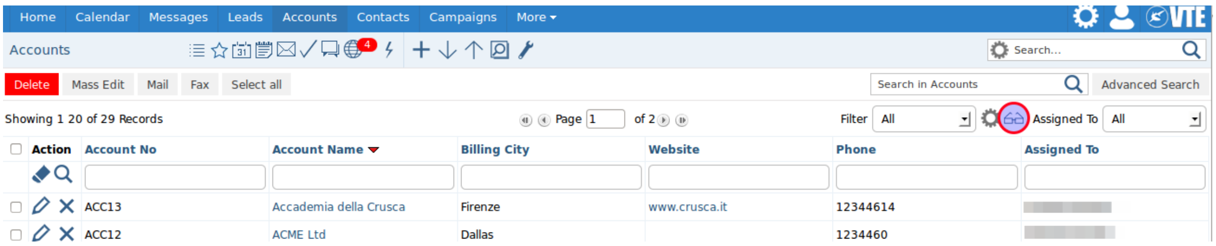
5.3 Notifications

With VTECRM you can always be up-to-date about information and data that are important for you, thanks to the Notifications module. Each user can define his own preferences about notifications:

- How to receive notifications: via email or directly within VTE
- How much often to receive reports of unread notifications
- Topics you want to keep under control



To see notifications click . VTECRM alerts you about unread notifications.
To be notified of changes within specific records or filters, you have just to "ask" VTECRM to do it, activating the glasses you find near the filter tool.



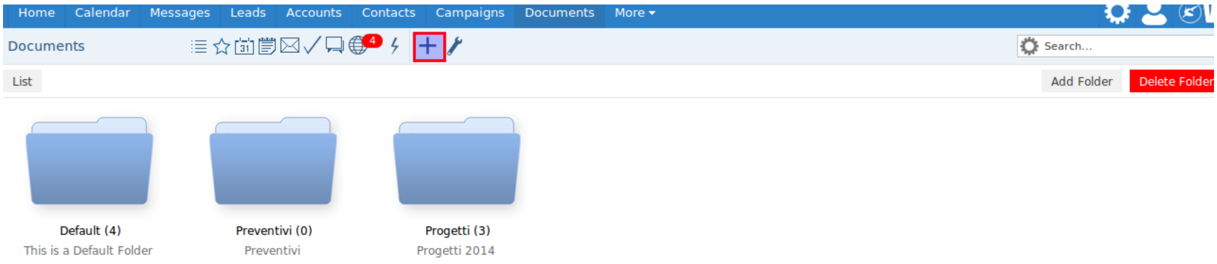
Notifications disabled

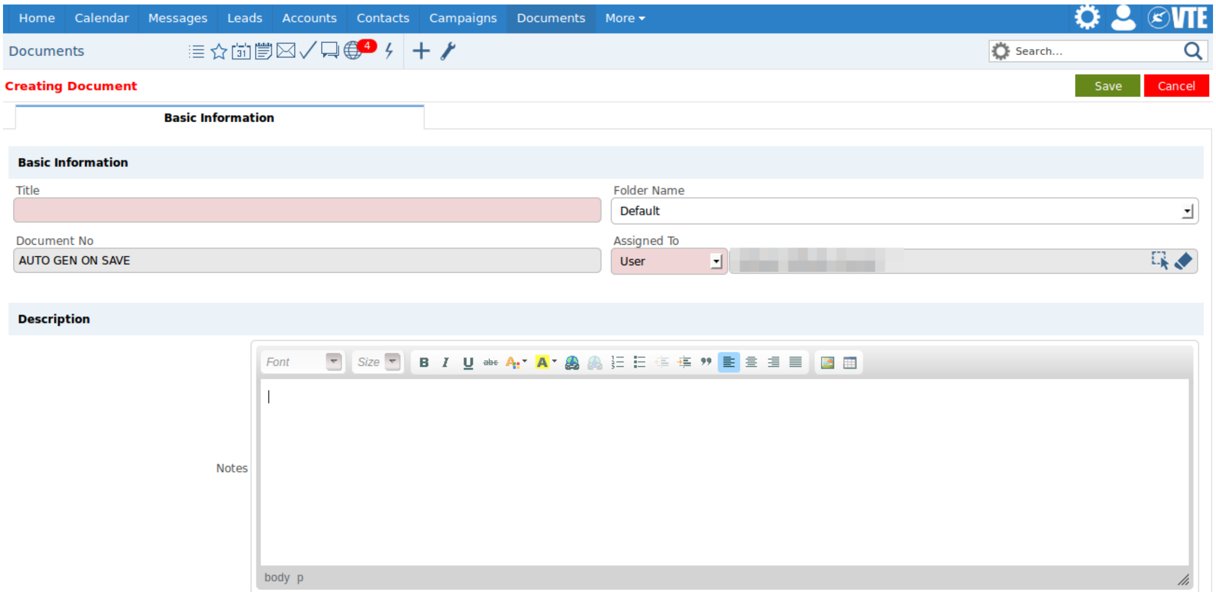
Notifications enabled

Example: I assign an assistance ticket to my colleague, and I want to receive a notification when he has closed it.

5.4 Documents

Documents are organized in folders, that you can add or delete. You can switch to a general list view (*List* button).
To create a new document from within the module, click +.

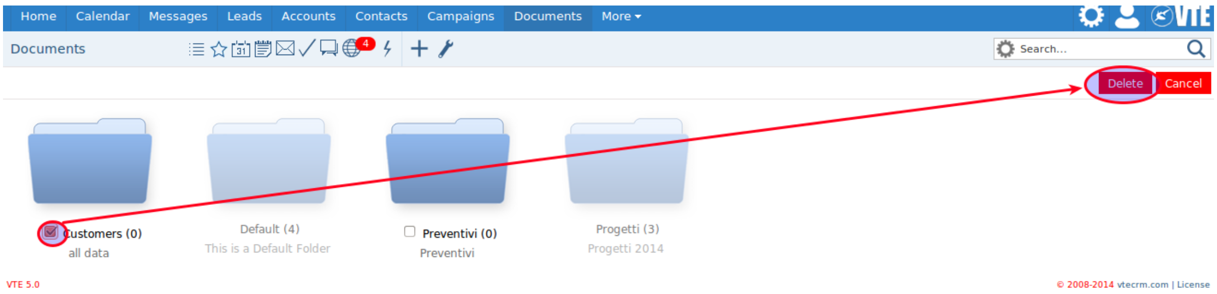




You can attach a file:

- internal: upload a file from your computer to VTECRM (file is saved in the folder)
- external: upload a link (file is not saved inside VTECRM).

Through the button *Add Folder* you can create folders in order to archive better all the documents.



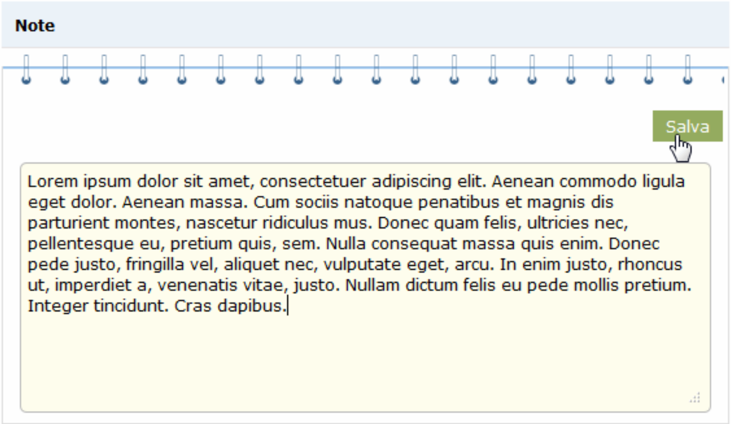
Note: You can delete a folder only if it is empty.
Inside the detail view of the document, in the *Other* menu you find two essential functions:

- add a revision (older versions are maintained)
- share the document via email (with a download link)

5.5 Notes

You find this tool in the task bar (tools menu) and at the bottom of the CRM records. A note can be (not mandatory) related to and/or converted into a record. Pay attention! The content of the note can't be filtered or view as a filter column. Actually notes are a personal tool, independent from the records they are related to.
The visibility of Notes is managed by the Shared Access:

- private: only the author can read/edit/delete the note
- public: everyone who access the record can read the note (read only)



***Please note!** VTE Community does not include Notes.

6. Marketing communication tools

In this chapter we will see:

- Newsletter module
- newsletter template
- Campaigns module
- Sms module
- Fax module

Campaigns and Newsletters are tools for sending marketing emails toward unlimited lists of recipients, tracking opening, clicking and other statistics.

6.1 Newsletters module

The Newsletter module is the VTECRM solution to manage the promotional mass mailing to customers.
Generally speaking, the Newsletter is contained into a Campaign, and the Campaign contains a series of targeted (you can make distinction by targets, issues, frequency…).
How to create a Newsletter with VTECRM? Two ways are possible.

a. **Wizard**: the button *Create Newsletter* in the Campaign list-view opens a 5-steps wizard for set up and send the newsletter. It creates also a new Campaign. If you click *Other > Create Newsletter* in the detail view of a Campaign, the Newsletter will be added to the Campaign you are in. ***Please note!** VTE Community does not include this tool.

b. **Manual steps**: you reach the same result by doing manually each step. This allows also to understand the logic of Campaign-Target-Newsletter relation: for the first time, we suggest you to choose this way.

Step 1: create a Campaign or access to an existing one
Step 2: define the recipients (Target)
Step 3: define the Newsletter and the email template

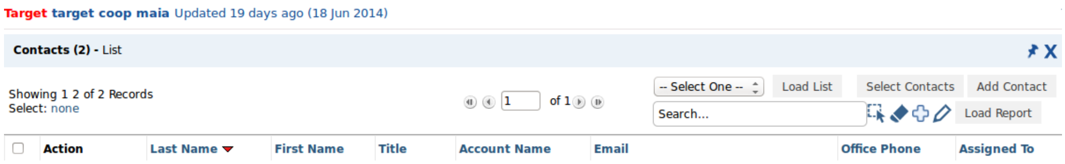
6.1.1 Step 1: Campaign

To create a new campaign, from within the Campaigns module click +.

Campaign Name	Name
Campaign Type	Choose it from the picklist, which can be modified by the admin user
Product	Select a product from your catalogue if you want to relate the campaign to a specific product/service
Campaign Status	Select the status of your campaign; the list is editable by the administrator
Expected Close Date	Enter a date of ending
Expected Revenue	The amount you expect as result of the campaign
Budget Cost	The costs of your campaign
Expected Response	The response you expect from the campaign
Assigned to	Assign the campaign management to an user or a group of users
Target	Description of the target (free text field)
Description	More information (free text field)

6.1.2 Step 2: Target

Now you can define the campaign's target. Open the field related to the Target module and select targets (one or more).



A target is made of accounts, leads and/or contacts. You can use a list (made by filters) as your target; click the button *Load List*.
For example:

- in the Accounts module, add a filter and create the list "from Liverpool".
- in the Target, open the Accounts related field and select "from Liverpool" list.
- click *Load List*: "from Liverpool" is now part of the target.

Note: The Newsletter module manages email address duplicates, by avoiding to send the same newsletter many times to the same recipients. So, if the target includes an account and a contact with the same email address, the newsletter will be sent only once.

6.1.3 Step 3: Newsletter and template

Now you can create the newsletter for the campaign. Click the button *Add Newsletter*.

Newsletter Name	Name
Campaign	The related campaign
Date scheduled	Newsletter sending date
Time scheduled	Newsletter sending hour
From Name	Your name as the sender, which appears to the recipients
From Address	Your email address as the sender, which appears to the recipients
Scheduled	Yes: the newsletter is done and you can send it No: the newsletter is not ready

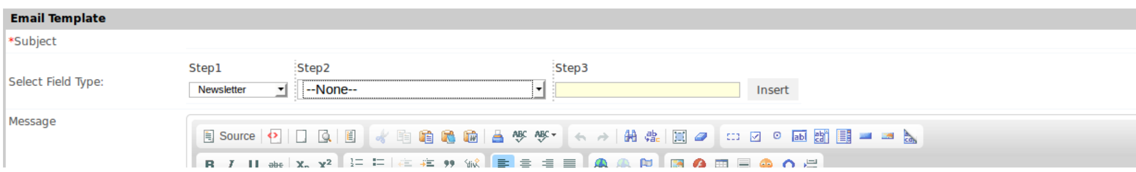
On the Other menu, there is the tool *Select Email Template*, which allows you to associate the newsletter to an email template.

 select an available template

 create a new one

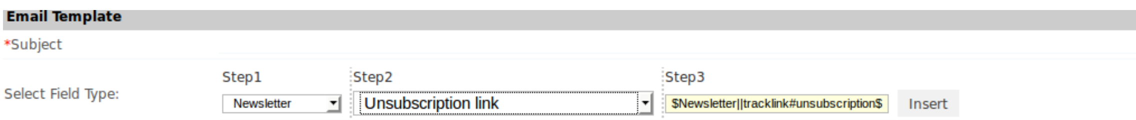
 modify or change the template related to the newsletter

Please see the specific chapter to understand how to create a new template.
You can insert variables in the text, for example in order to begin every email with the name of the contact ("Dear FirstName LastName…").

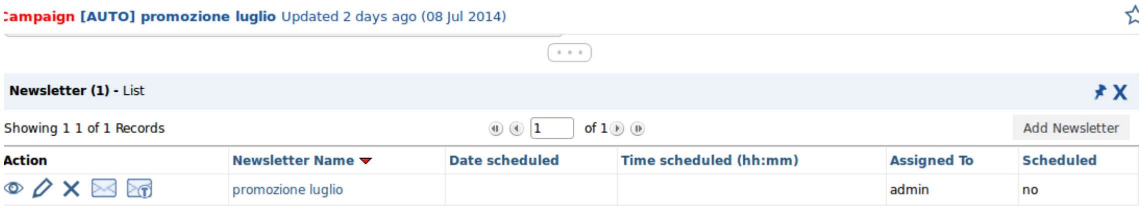


As you see in the figure below, in Step 1 you have to select *Newsletter* and in Step 2 you have to choose the variable. The variables with (Target), for example "Name (Target)", are standard variables of Leads, Accounts and Contacts modules.

Unsubscribe from newsletters



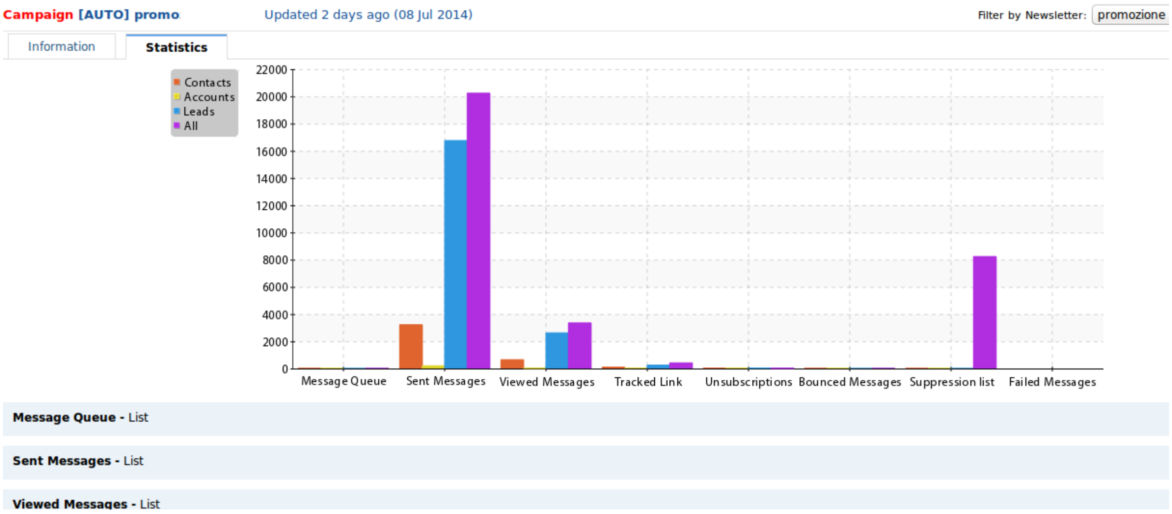
In the newsletter template it is better to insert a variable that appears to recipients as the unsubscribe link.
Once the newsletter is done, you can send a test e-mail to yourself and check how the newsletter appears. Finally send it for real.



The buttons *Send Email* and *Send Test Email* are available also from the Campaigns module. Remember that a campaign can be related to an unlimited number of newsletters.

Note: The newsletter will be sent at the scheduled date/time you set previously (if date/time are in the past, the newsletter is sent immediately).

6.1.4 Statistics



The Campaigns module provides you with the statistics of the email sending, from a summary chart to detailed statistics about each one.

- Message Queue: email not yet sent
- Sent Messages
- Viewed Messages: opening statistics, with number of openings, date, time of first and last opening per recipient
- Tracked Link: number of link openings per recipient (if there were links within the email)
- Unsubscribe: recipients who clicked the unsubscribe link (if there was)
- Bounced Messages: unsuccessful sending
- Suppression List: suppressed email addresses
- Failed Messages: not sent (incorrect)

Through the icon you can check which email are rejected. The addresses rejected more than 5 times are automatically suppressed (you can check them in the Suppression list); VTECRM does not try to send a newsletter again to those recipients.

When you open the statistic tab, as default it shows the statistics of the whole campaign (all the newsletters related to the campaign). To view only the statistic of a specific newsletter, select it from the picklist on top right.

6.1.5 Manual management of unsubscriptions

You can decide manually to send or not send newsletters to a single Contact, Account and/or Lead, through the following field:

***Please note!** VTE Community does not include this tool.

6.2 Other type of Campaigns

The purpose of the Campaigns module is to relate a specific Target to a marketing activity. It can be used for promotional campaigns, to coordinate selling strategies or lists of special customers. For this reason, a Potential can be added to a Campaign, and this allows to verify the actual results of the activities:

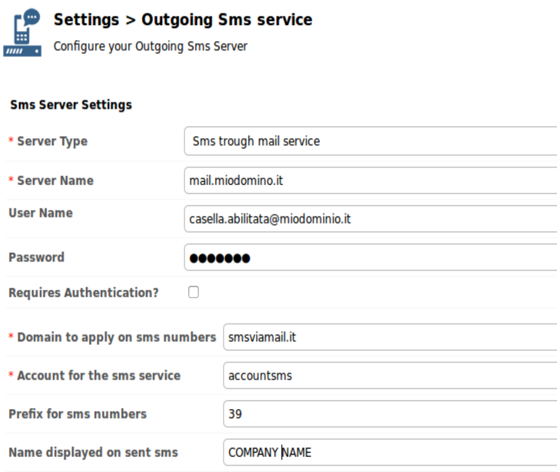
- How many Potentials have been generated from the Campaign?
- How much is their total amount?
- How many of them have been closed as win?
- How much is the final profit?

Furthermore, extra modules as Telemarketing and Events can be involved.

6.3 SMS

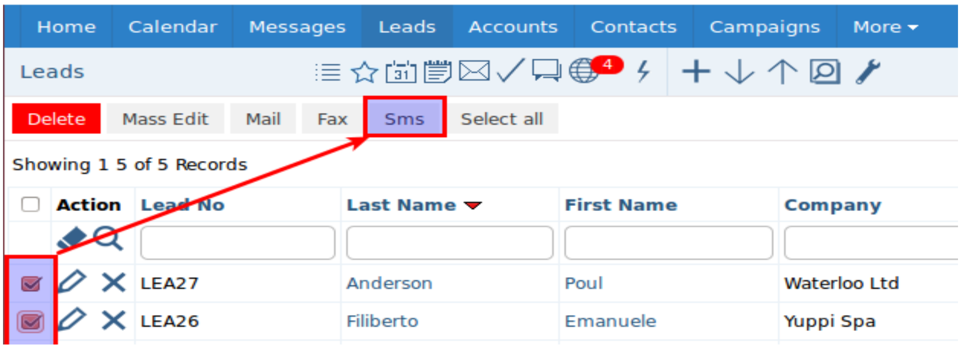
It is possible to enable VTECRM to send SMS. First, you need an email-to-SMS service, it means a service that turns emails in SMS.
To send a SMS via email, you have just to send a usual email to a recipient named as the following:
national code and recipient number @ service vendor domain . it/com/…

When you click *SMS* from within a record (for example a contact), VTECRM generates the address automatically.
To configure the SMS function, access as admin and go to: *Settings > Outgoing SMS Service*.
Define one or more email addresses enabled to send SMS. You have to enter data of the mailbox, national dialing code, domain of the SMS service provider, etc.



Server Name	The Mail Server (SMTP) of the mailbox you want enable to send SMS
User Name	Login to the mailbox
Password	Mailbox password
Requires Authentication?	Yes/No according to the Mail Server features (usually Yes)
Domain to apply on sms numbers	This info is provided by the supplier of the SMS service
Account for the sms service	The account name for the SMS service, provided by the supplier
Prefix to apply on sms numbers	The national dialing code (39 for Italy)
Name displayed on sent sms	This function depends on the service provider, it might not be enabled

Within Leads, Contacts or Accounts modules, the SMS function allows you to send single or massive SMS.

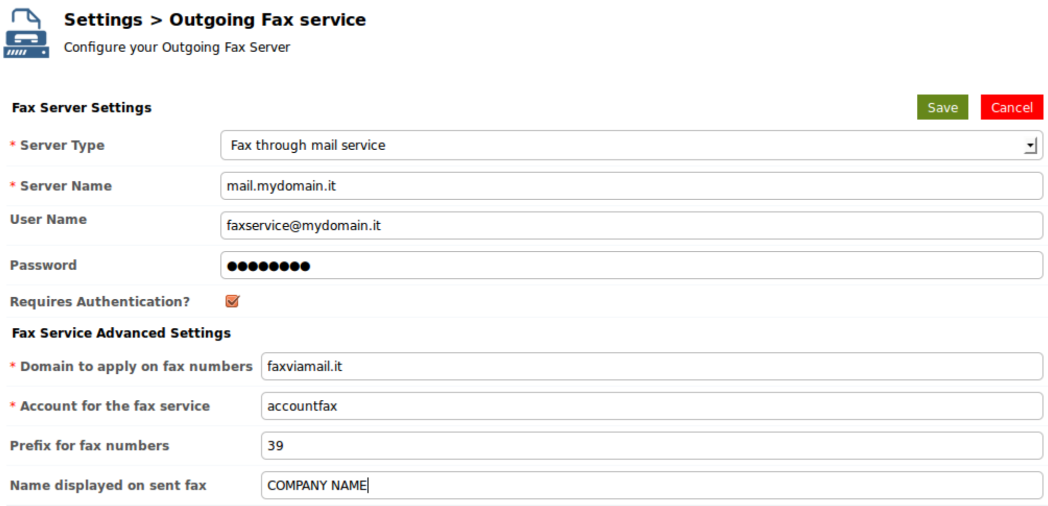


6.4 Fax

You can configure VTECRM for fax sending. First, you need an email-to-fax service, it means a service that turns emails in fax.
To send a fax via email, you have just to send a usual email to a recipient named as the following:

national code and recipient number @ service vendor domain . it/com/…

When you click *Fax* from within a record (for example a contact), VTECRM generates the address automatically.
To configure the fax function, access as admin and go to: *Settings > Outgoing Fax Service*.
Define one or more email addresses enabled to send fax. You have to enter data of the mailbox, national dialing code, domain of the fax service provider, etc.



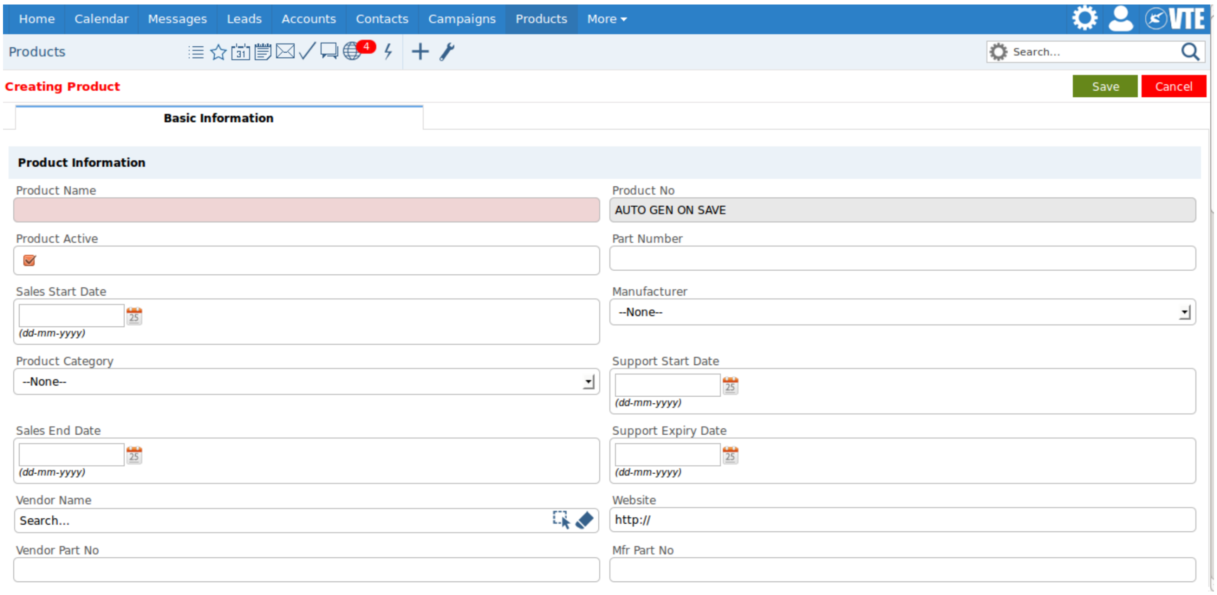
Server Name	The Mail Server (SMTP) of the mailbox you want enable to send fax
User Name	Login to the mailbox
Password	Mailbox password
Requires Authentication?	Yes/No according to the Mail Server features (usually Yes)
Domain to apply on fax numbers	This info is provided by the supplier of the fax service
Account for the fax service	The account name for the fax service, provided by the supplier
Prefix to apply on fax numbers	The national dialing code (39 for Italy)
Name displayed on sent fax	This function depends on the service provider, it might not be enabled

Within Leads, Contacts or Accounts modules, the Fax function allows you to send single or massive fax.

7. Inventory: products, services and pricebooks

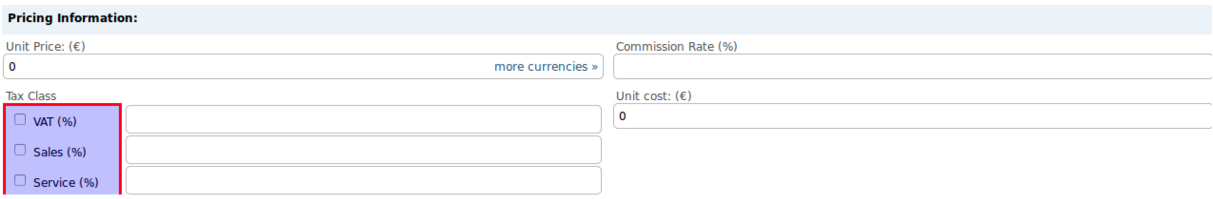
7.1 Products

To create a new product, click + in the Products module and enter the details (as in the figure below).



Product Name	Name of the product
Part Number	Product code; it appears in Quotes, Sales Orders, Invoices and Delivery Notes
Vendor	The vendor name
Product Active	Active products: available to be sold Not active products: not available to be sold, you can't insert them in a quote
Quantity in Stock	Available quantity
Reorder Level	Threshold quantity for the reorder

In Pricing Information you can enter the price of the product (also in different currencies), tax and tax percentages.



Note: the administrator, from the Settings menu, defines Tax and currency.
Stock Quantity is automatically updated when you create an invoice or sales order (increasing or decreasing depending if you buy from a supplier or sell to a customer).
A list of product can be imported or exported (see CSV Import/Export in the Customer Management chapter).

7.1.1 Products bundles

You can create and manage "families" of products through relations like "father and son" between products. They appear in the lists named Product Bundles and Parent Product. This hierarchy is useful for the creation of quotes, sales orders and purchase orders.

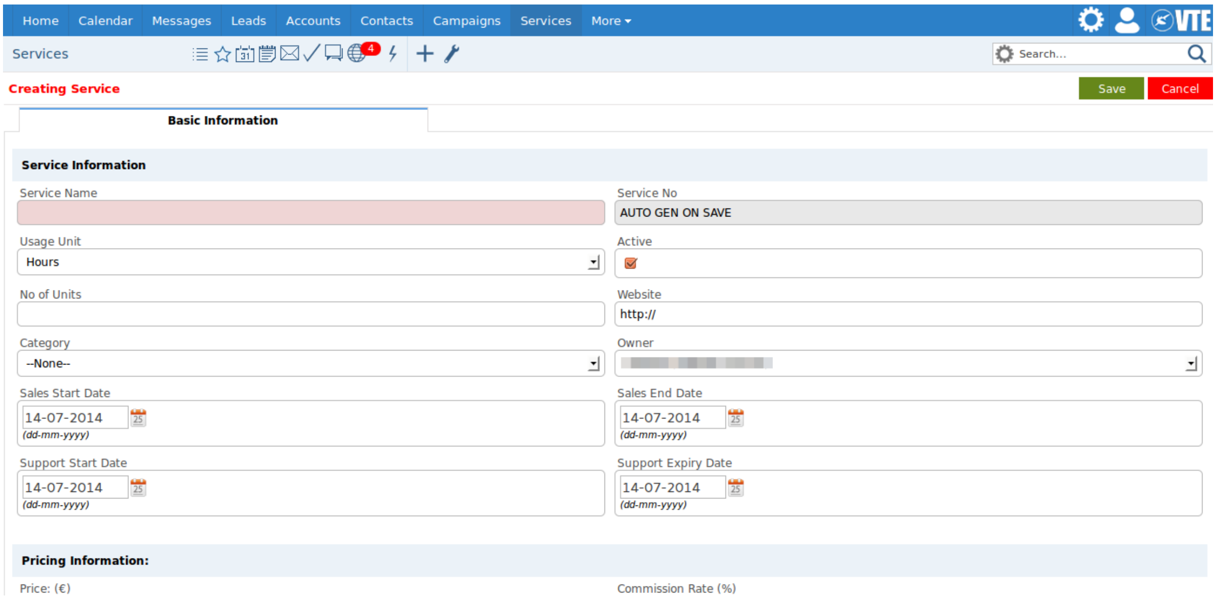
To create a bundle, open the record of the “father” product and click *Product Bundles* to add a new product that will be the “son” of this one.
Note: The price of the parent product is not the sum of bundle products prices; you enter manually its price. You can see the bundle product listed in the Parent Product field.

7.2 Product Lines

A Product Line gathers a group of products which meet the same or similar needs. Common Product Lines could be, for example, categories of goods such as Hardware and Software, or Shoes and T-Shirts, etc.
The Product Line details include the *Budget* field, which provides a forecast of profit.
Once saved the empty Product Line, add the Products through the related content menu.
***Please note!** VTE Community does not include Product Lines.

7.3 Services

The Services module is useful for a company that offers training and support packages measured in hours, days, months or years.

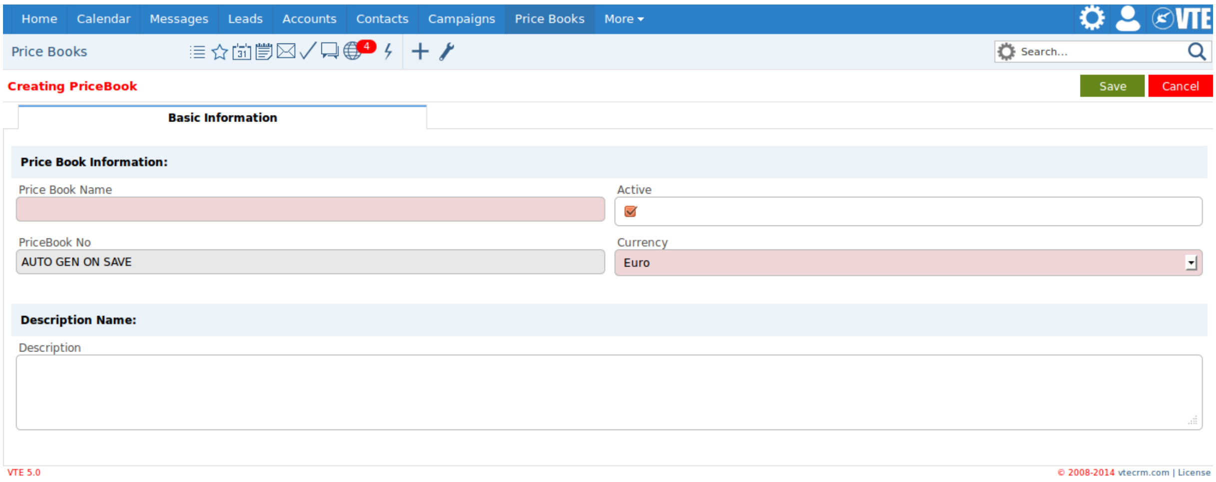


Service Name	Name of the service
Usage Unit and Number of Units	Usage unit for the service and the number of units Note: Contract Services allows to manage the time usage
Active	Active services: available to be sold Not active services: not available to be sold, you can’t insert them in a quote

In Pricing Information you can enter the price of the service (also in different currencies), tax and tax percentages.
Note: Tax and currency are defined by the administrator from the Settings menu.
A list of services can be imported or exported (see CSV Import/Export in the Customer Management chapter).

7.4 Price books

To create a new price book click + in the Price Books module.



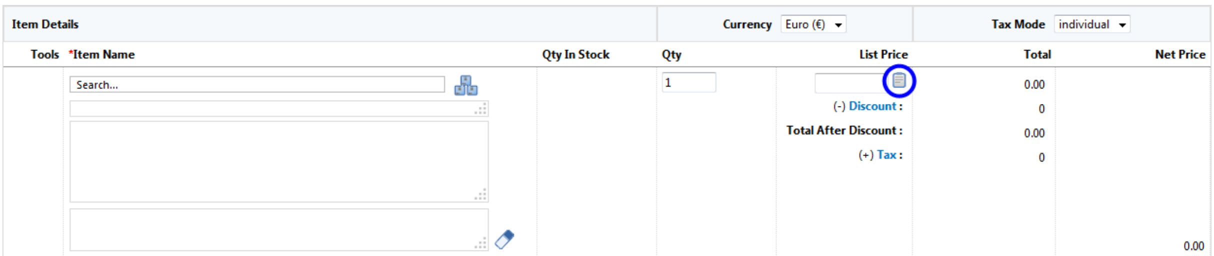
Price Book Name	Name of the price book
Currency	Currency
Active	Active price books: available for sales Not active price books: not available for sales (can’t be applied in a quote)

Note: Currencies are defined by the administrator from *Settings > Currencies*.
You can relate the price book to specific products and services, through the buttons in the lift menu.

Select products/services and enter the price you want to read on the price book.

We suggest to give to the price book an unique name, in order to avoid confusion. VTECRM allows you to write a short description.

A price book is useful when you have to create invoices, quotes and sales orders.
For example, you can choose which price book you want to apply in a quote. Click and select the price book.



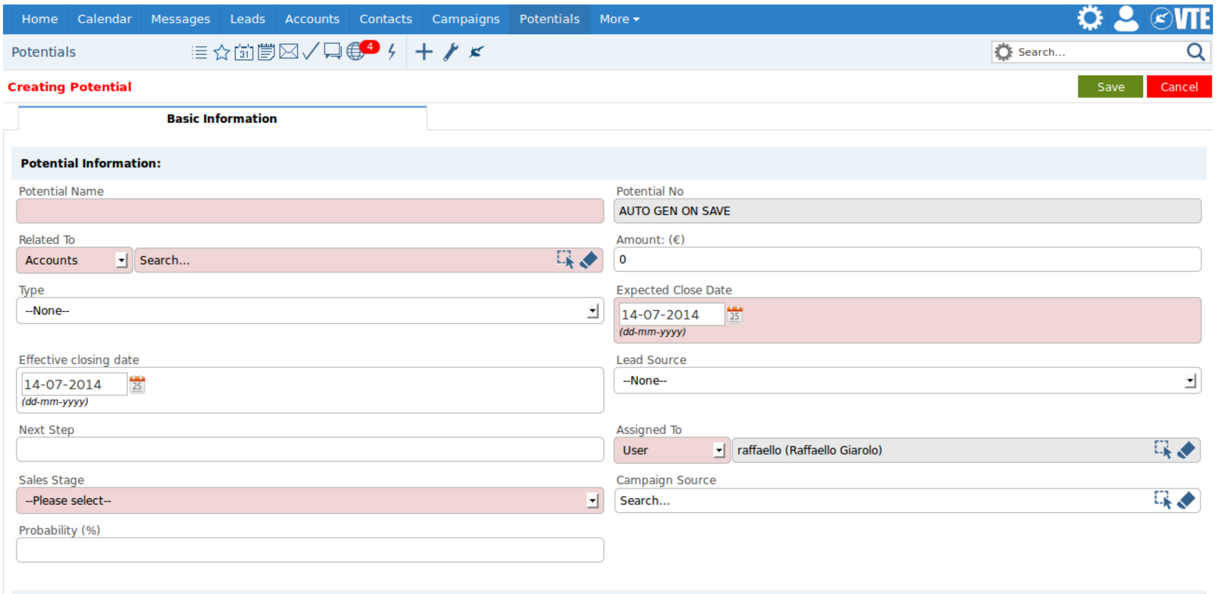
8. Sales: from Potential to Invoice

After the customer acquisition (see Leads, Contacts, Accounts), VTECRM provides a complete management of the sales area through the following modules:

- Potentials
- Quotes
- Sales Orders
- Invoices
- Delivery Notes

All these modules are related to Accounts and/or Contacts. Marketing lists are managed by Leads. Only when the lead is converted into a real customer, the CRM keeps track of the sales process.

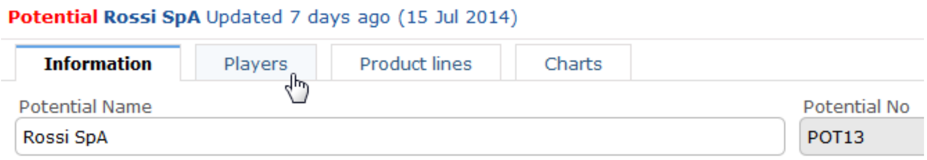
8.1 Potentials



Potential Name	Enter a name for the potential
Amount	Expected amount or the value of the potential
Related to	The potential has to be related to an account
Expected Close Date	A closing date for the potential
Type	The picklist can be set by the administrator user
Next Step	Enter what will be the next step of the deal
Lead Source	This field can be set by the administrator
Sales Stage	The picklist of the stages can be set by the administrator user
Assigned to	As default assigned to the user who creates the potential, but you can assign it to someone else
Probability (%)	A forecast of success in %
Campaign Source	You can relate the potential to a campaign; the field is filled automatically if you create the potential directly from a campaign
Description	More information (free text field)

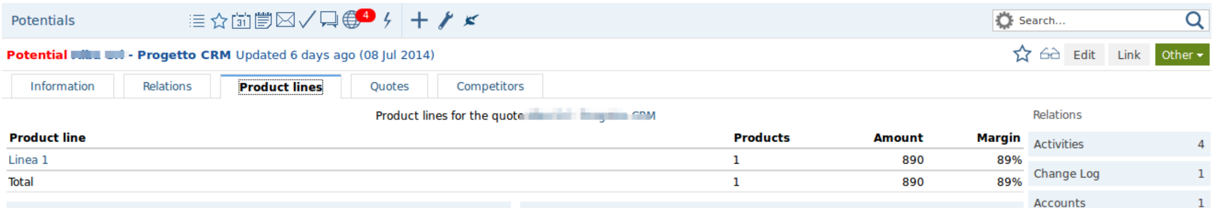
8.1.1 Shark Panel

The Potential module provides information relating to the negotiation, putting it in relation with other objects connected to it. We call this feature *the Shark Panel* and it is navigable through the tabs that appear on the top of every Potential record, as in the image:



Specifically:

- *Information*: the potential itself.
- *Players*: contacts, partners and competitors involved in the negotiations. You can assign a role to each of these players.
- *Product lines*: if Products and Product Lines are set correctly, this tab shows profit margin and amount per line. The calculation is based on the content of the Quote related to the Potential; the Quote must have *status = created* or *delivered*; the calculation does not include taxes, fares and adjustments.



- *Charts*: introducing some charts for a better view of how the negotiations are going.

If you click , the system redirect you on a budget report. It offers an immediate view of the business situation, organized by time range (year, semester, trimester, quarter or month). The report shows:

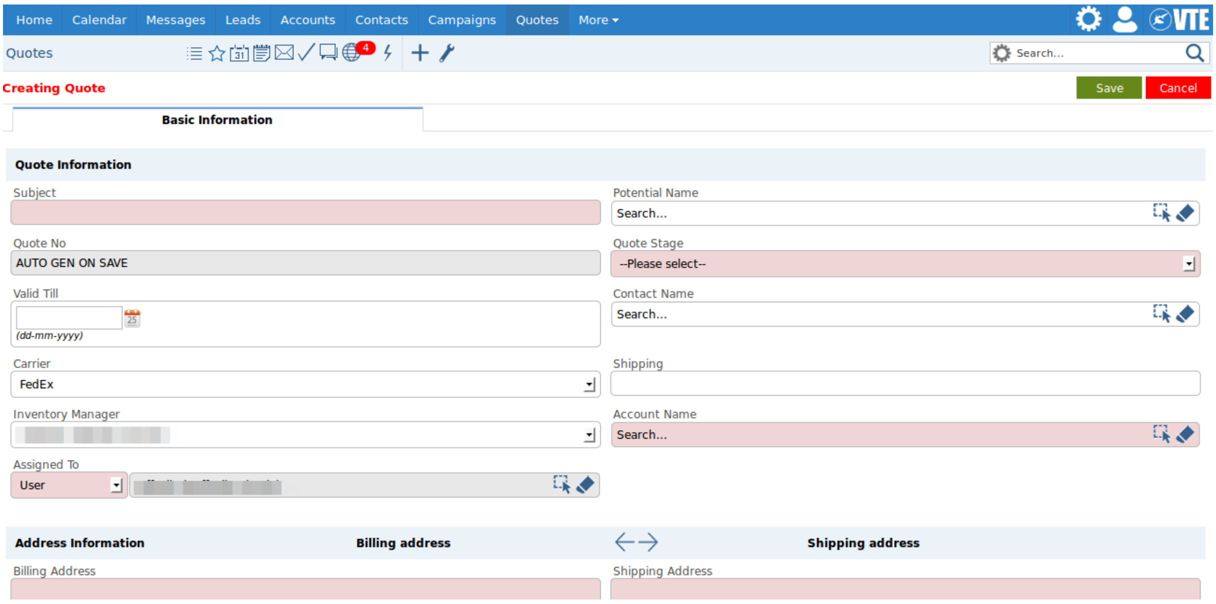
- Budget: you have to set the Yearly Budget field in every product line record.
- Best: the sum of the amount of potentials that have a likelihood of closure of at least 70%.
- Forecast: the sum of the amount of potentials that have a likelihood of closure of at least 80%.
- Worst: the sum of the amount of potentials that have a likelihood of closure of at least 90%.
- Closed orders: presents the sum of the amount (of sales orders grouped by product line).
- Delta Budget: shows the difference between the budget defined in the product line and the amount of related sales orders. Expresses how much remains to achieve the budget.

***Please note!** VTE Community does not include this tool

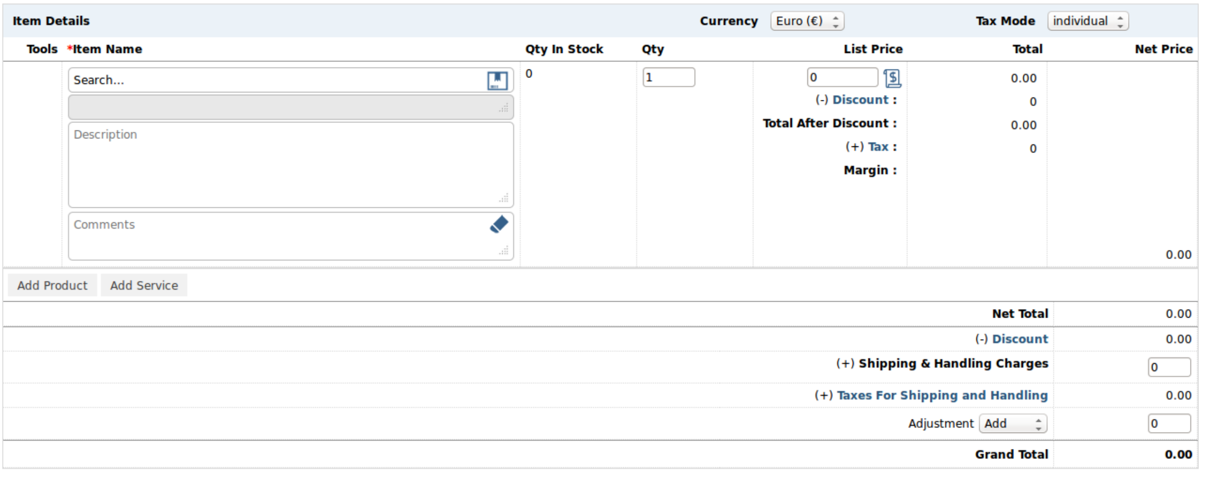
8.2 Quotes

Add a Quote from the Potential, the Account or the Contact, in order to maintain the relations. Otherwise, create a new empty Quote from the list view of the module.

Subject	A name. We recommend to include the account name
Potential Name	Automatically related if you create the quote from the potential record
Quote stage	Select a status for the quote (useful if has to be approved by somebody else)
Valid Till	Expiration date for the offer
Contact Name	Select the name of the referent
Inventory Manager	If you use VTECRM also to manage your inventory, you can assign a specific manager. Once saved, the inventory manager receives an e-mail with the quote details (quantity to sell, quantity in stock, etc). As usual the administrator can change these settings from *Settings > Inventory Notifications*
Account Name	Automatically related if you create the quote from the account/potential record
Assigned to	The user who manages the quote (as default, the one who creates it)



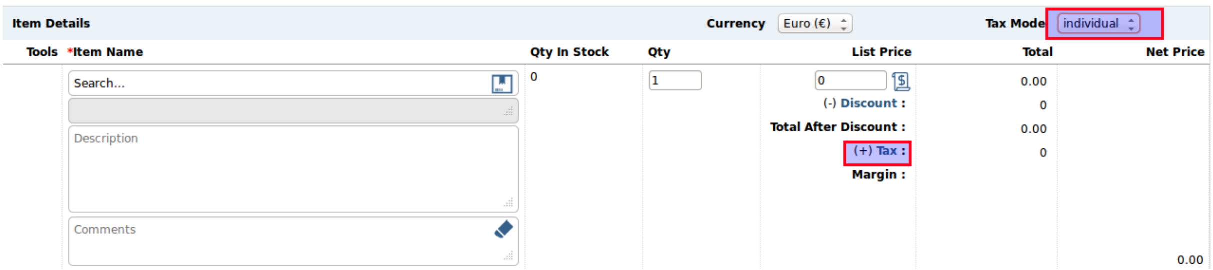
Then add products and services, price books, and enter discounts, taxes, etc.



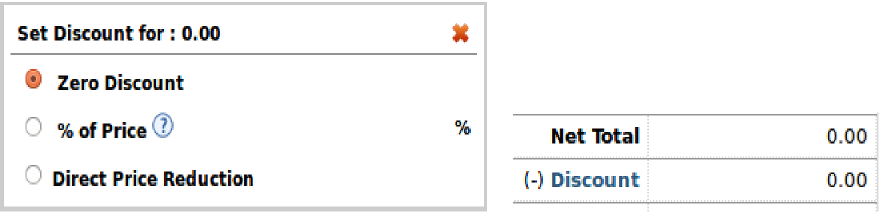
Once saved, you can directly turn the quote into a PDF document. Check the features of the PDFMaker on the right (and please refer to the specific chapter). Furthermore, you can send the quote as email attachment.

8.2.1 Product rows

VTECRM considers all the kind of taxes and discounts including local, state or federal taxes. They can be applied on each product/service or on the total amount; VTECRM supports both the individual product taxation and the group taxation. Select the type of taxation before selecting the product/service.



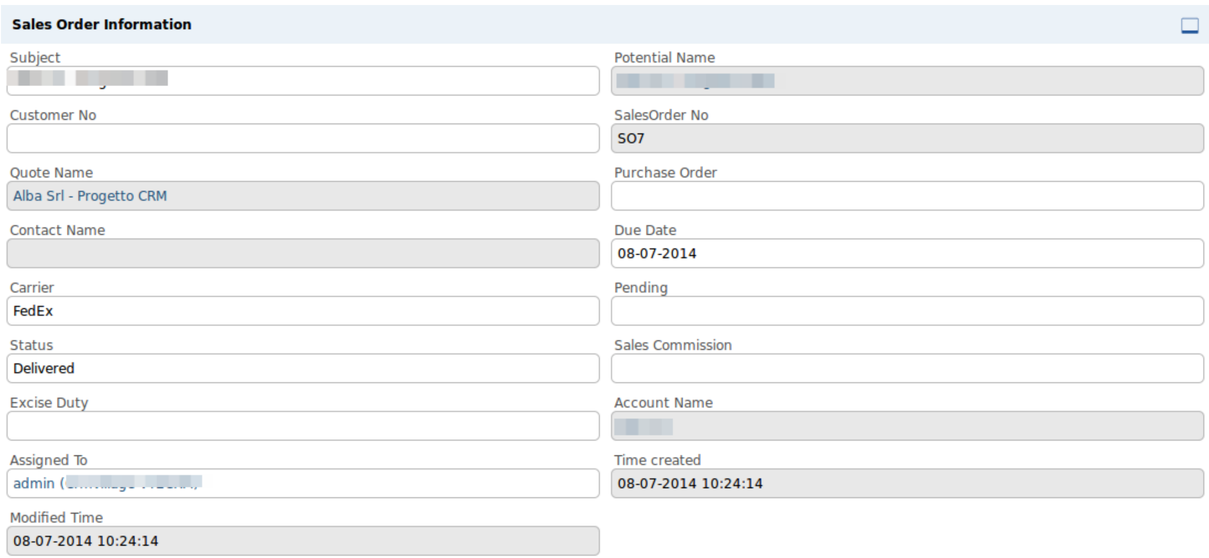
Products	Select the product/service from the lists (made through Products and Services modules). You can add a comment under each product

Qty In Stock	The quantity available in stock
Quantity (Qty)	Select the quantity to sell
Unit Price	Product price per unit
List Price	Clicking on the icon you can select the price book you want to apply; useful if you have different prices books for different types of customers
Discount	Enter a discount per product or to apply on the total amount; numeric or percentage (in this case you can write in sequence more discounts, separating percentages with +)  Ex: (1000 € – 5%) – 10% discount: 50 + 95 = 145 €
Tax	As default the taxes are based on your products catalogue, but you can modify the taxation specifically for the quote (without changing the catalogue)
Shipping & Handling Charges	Additional shipping charges
Taxes For Shipping and Handling	Additional shipping taxes
Adjustment	Rounding

Finally, write specific Terms & Conditions for the quote; click *More Information*.

8.3 Sales Orders

You can create a sale order from a quote through the button *Generate Sales Order*. In this way the Quote information are transferred to the sale order, which automatically become part of the customer history. Otherwise, create a new empty order through the + icon in the module.



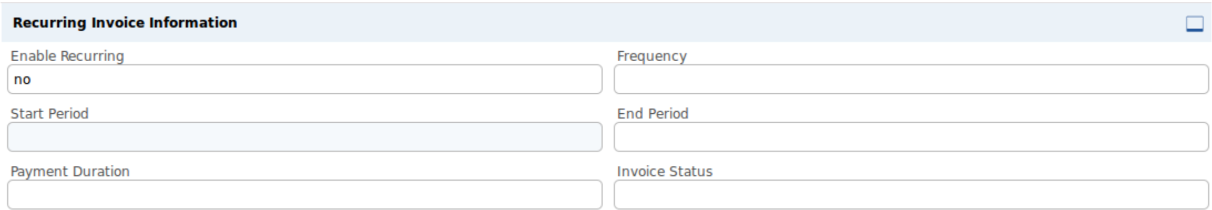
Subject	A name for the sale order. We recommend to include the account name
Potential Name	Automatically related if you generate the order from the previous quote
Customer Number (No)	If your Company works with numeric codes to distinguish customers, you can put it here.
Quote Name	Automatically related if you generate the order from the previous quote
Puchase Order	Purchase order number related to the customer
Contact Name	The order is automatically related to a referent, if you generate it from the previous quote
Due Date	A due date

Carrier	Select the carrier that your customer prefers
Status	A status for the sales order; useful if it has to be approved from somebody else
Excise Duty	If there are special taxes or other costs
Account Name	The order is automatically related to an account, if you generate it from the previous quote
Sales Commission	Insert a sale commission
Assigned to	The user who manages the sale order (as default, the one who creates it)

As Quotes, also the Sales Order modules is related with Activities, Documents, Invoices… Within a sale order record you can access to the sale history, the activity history, etc.

8.3.1 Recurring invoice from Sales Order

From a sale order you can enable the Recurring Invoice option, as in the figure below.



Enable Recurring	Enables the automatic generation of the sale order invoice
Frequency	How often the invoice has to be created: daily, weekly, monthly…
Start Period	The starting date
End Period	The ending date
Payment Duration	How much the payment lasts
Invoice Status	The status of the autogenerated invoices

8.4 Invoices

To create an invoice, click + from the Invoice module or, if you prefer, use the button *Create Invoice* from a sale order or a quote.

For the PDF creation see the specific chapter.

8.5 Delivery Notes

VTECRM allows you to manage the shipping delivery notes. Access to the Delivery Notes module and add a new one through the + icon. As usual, you can create a note from a previous sale order; in this way all the order data are transferred on the delivery note. Enter the main information and the products you have to ship.

To print in PDF see the PDFMarker chapter.

9. Post-sales: the Customer Service

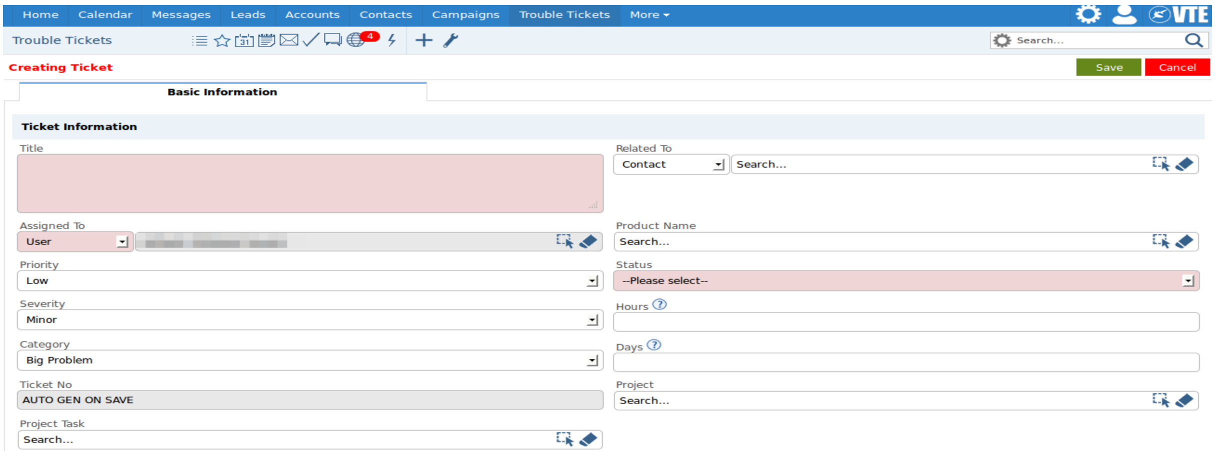
VTECRM manages the post-sales cycle through the Trouble Tickets module. This is an essential tool for your assistance service:

- provides the customer with a simple tool (the ticket) through which send assistance requests
- your sales department has an immediate overview of the requests
- you can answer to each request and solve each problem, managing step by step the after-sale services
- technical/sales office keep track of the provided services (contracts) and the product IDs (assets)
- you can share FAQ between users and customers

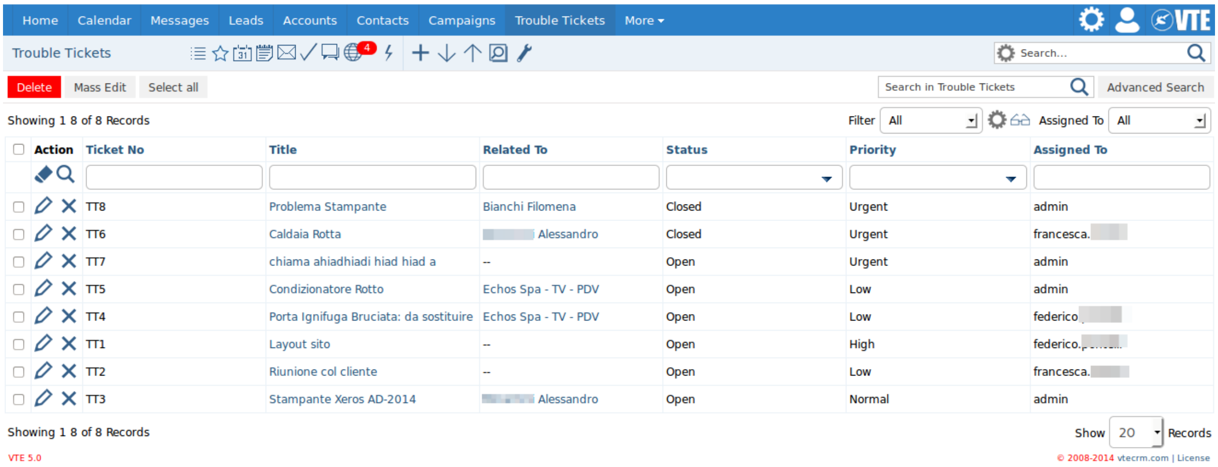
9.1 Trouble Tickets

The Trouble Tickets module is based on tickets: it represents the customer request and is linked to other VTECRM records (ex: product/service, activities, contact/accounts, etc). Tickets might be used as well for requests internal to the company (for example, the management of non-compliances).

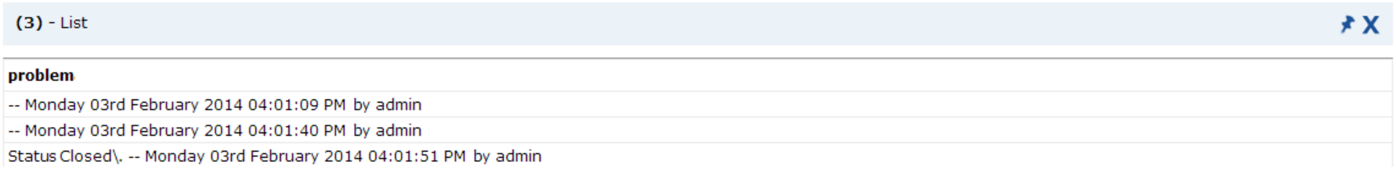
To create a new ticket, from Trouble Tickets click +. From a specific record click *Add Trouble Tickets*.



Priority	The assistance group assign a priority to every ticket in order to have a solving order
Severity	Urgency of solving based on the importance of the customer
Category	Ticket type: complaint, technical trouble, etc.
Linked to	Relate the ticket to an account, a contact, etc.; creating the ticket from a existing record generates automatically the connection
Status	Stage of the ticket: open, solving, closed, etc.
Hours	Solving time in hours; if the ticket is related to a contract service, the unit usage updates as the ticket status changes to Closed.
Days	Solving time in days; if the ticket is related to a contract service, the unit usage updates as the ticket status changes to Closed.
Project	You can relate the ticket to a project
Project task	You can relate the ticket to a task



The Status History (related content menu) shows every status change, tracking the work history of the Ticket.



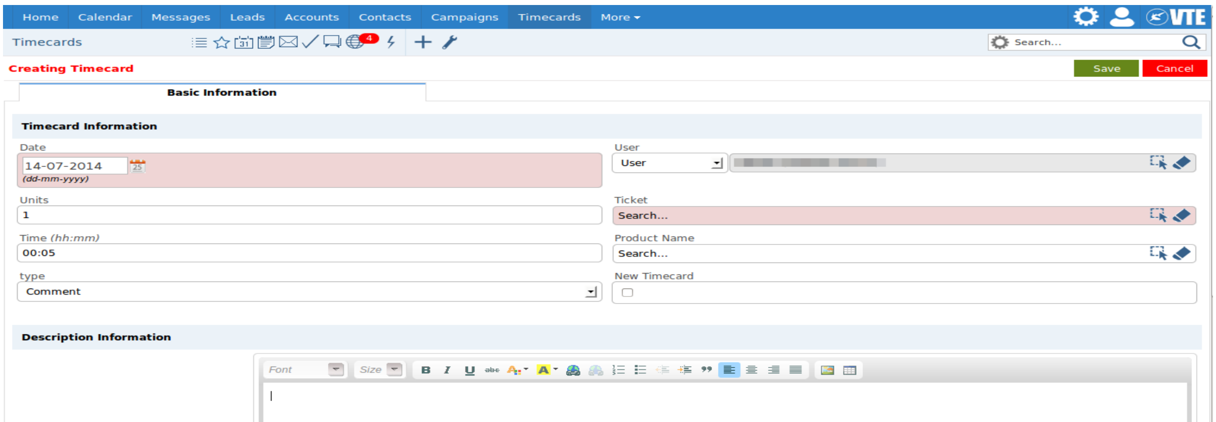
9.1.1 Acquisition channels (integrations)

You could gather tickets through three different channels.

1. Phone: after the call from the customer, the operator creates a new ticket
2. Customer Portal (online): customers can access a restricted area where they send requests. For more information see the Customer Portal chapter.
3. Email: the module can be integrated with the email address usually dedicated to information requests. Each email is turned into a ticket through the Mail Converter tool (see specific chapter).

9.2 Timecards

You can relate tickets to resolution timecards, to manage the actions. From within the ticket, click *Add Timecards* in the lift menu.



Date	Timecard date
Assigned to	User or group of users who manage the timecard
Units	Number of units involved
Time	Necessary time

Product	Product related to timecard
Ticket	Ticket related to timecard
New Timecard	If enabled, adds a new timecard after the saving
Change ticket state to	Change the state
Assign ticket to	Re-assign the ticket

The sum of all timecards related to a single ticket is shown in the field Days/Hours within the ticket.

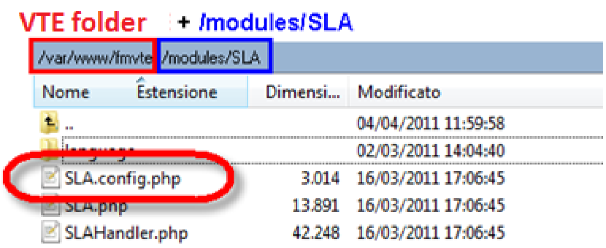
9.3 SLA

The Service Level Agreement defines the level of efficiency in supplying a service, such as the assistance. The efficiency is measured in terms of time and performance.
VTECRM includes a SLA counter that keeps track of passing time from the opening until the solving of a Ticket.

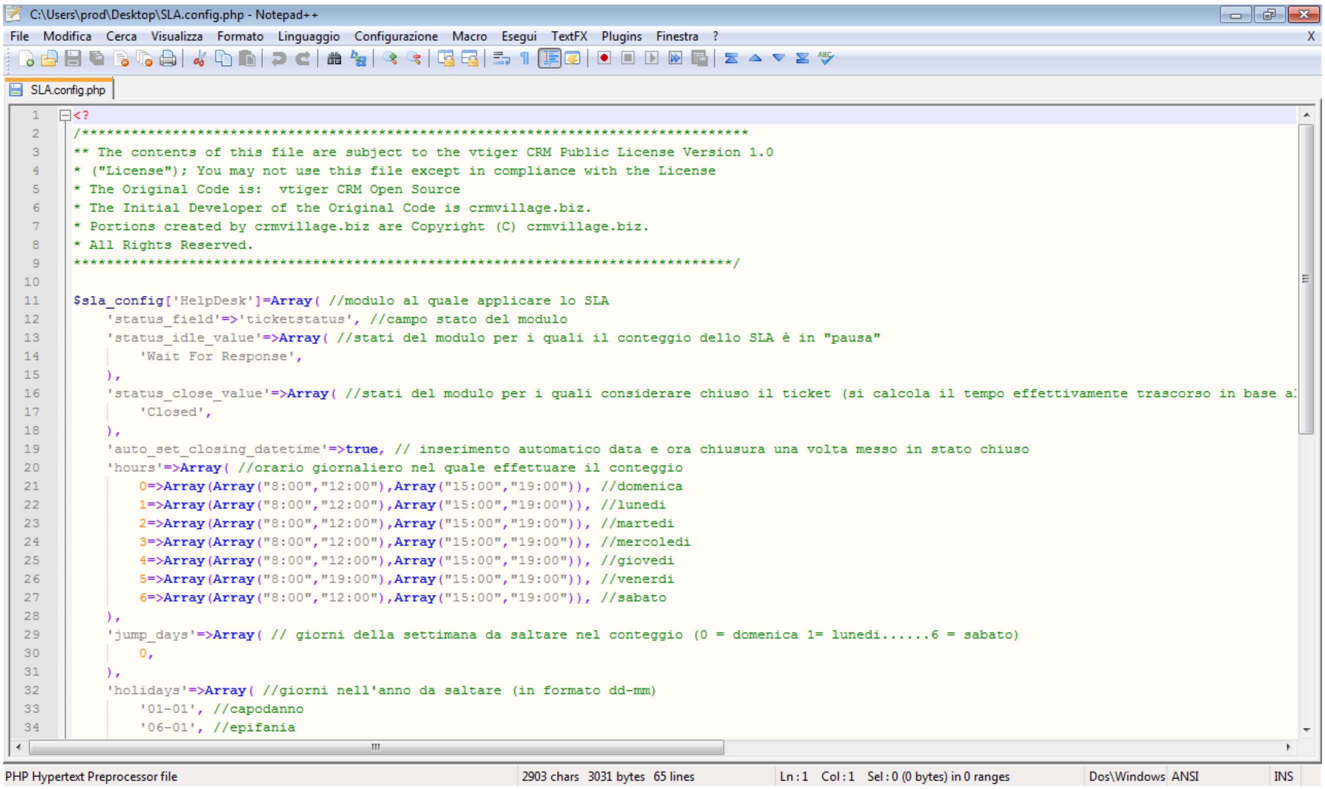
- Time elapsed: from the opening of the ticket (it considers working hours and possible interruptions)
- Time remaining: before the deadline
- SLA start date: starting date/hour
- SLA end date: closing date/hour planned
- Update time: last update of autogenerated fields*
- SLA Estimated time: estimated solving time
- Due date: as the ticket is closed
- Due time: as the ticket is closed
- End SLA: autogenerated when the count ends
- Idle Time Elapsed: time out of SLA
- Out SLA Time Elapsed: time spent after the assigned SLA period
- Reset SLA: reset the counter and restart

9.3.1 SLA configuration

To configure the SLA module, access the file SLA.config.php inside the folder in which VTECRM modules/SLA is installed.



Open that file with a text editor (ex: Notepad++).

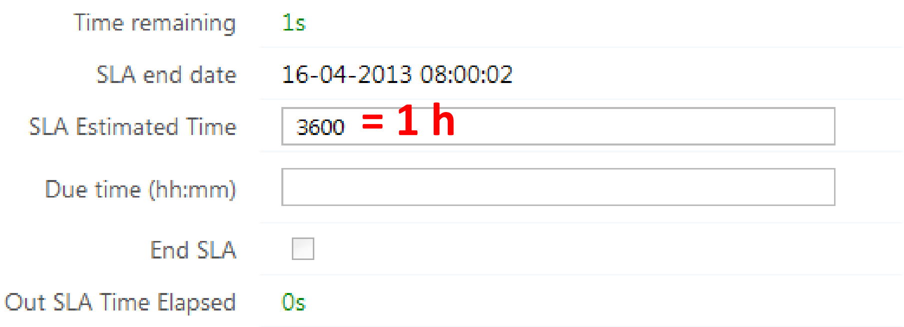


Define the settings through which the SLA counter has to work.

SLA estimated time

The field SLA Estimated Time shows the estimated solving time of the ticket.

When you enter it, the time must be in seconds.



Auto-generation of the SLA Estimated Time

You can configure VTECRM in order to generate automatically the SLA Estimated Time through Workflows.

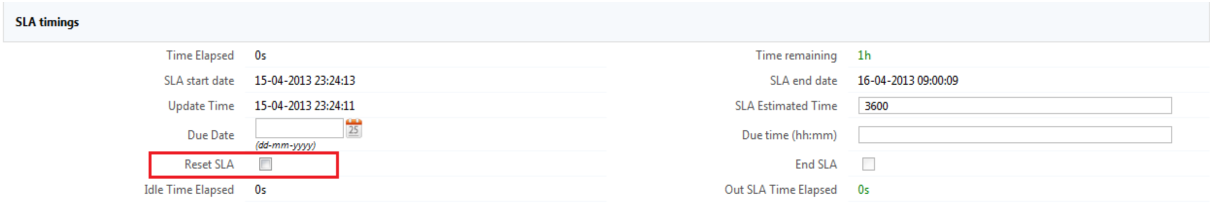
Example: if the ticket is a blocking ticket, the SLA Estimated Time is 4 hours, otherwise is 12 hours. You have to create a workflow in order to set up the SLA Estimated Time based on the ticket priority.

a) define the condition: priority is urgent

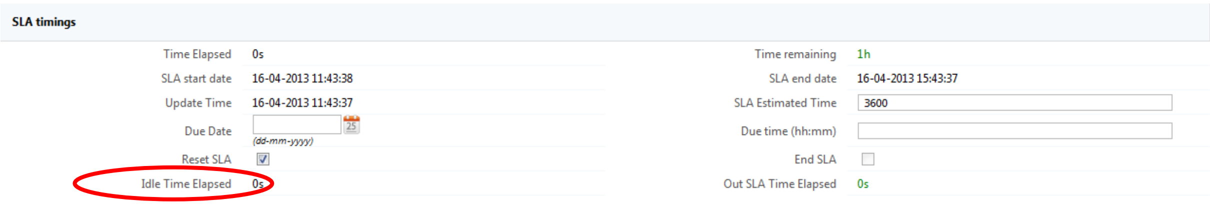
b) define the length of the operation: create a Task

Reset SLA

Reset SLA allows you to reset the counter and restart when you set up the SLA counter.



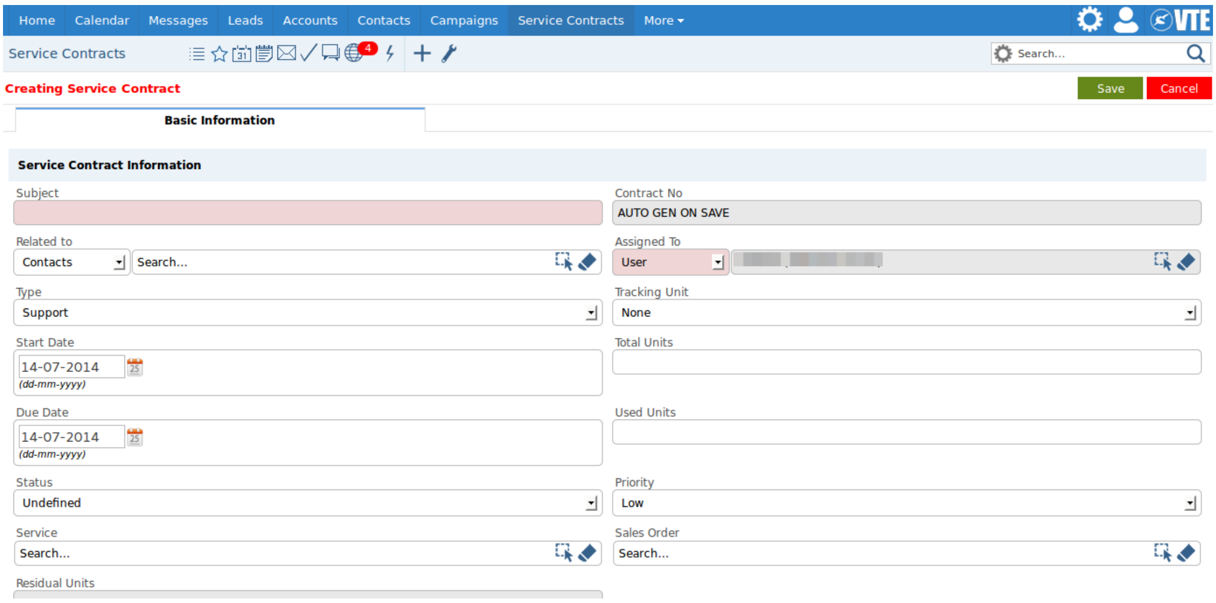
a) pick the Reset SLA field



b) refresh the page to display the new count

9.4 Contract Services

The Contract Services module allows you to manage all the services measured in time (days, hours), as the assistance service on customers.
The time value is automatically generated in the Total Units field.



Field	*Description*	*How to enter*
Due Date	The end of the contract service	When the status is Complete or when used units reach or exceed total units
Planned Duration	Planning period (days) for the service	Whenever the record is saved
Current Duration	Actual period (days) for the service	Whenever the record is saved or when used unit are updated
Progress	Progress (%) of the service	Whenever the record is saved or when the used unit is updated.

Related to	Account/Contact the service is related to	Automatically generated with the name of the company, if the service is created from a service (Service module) related to a quote, invoice, sale order, etc.
Tracking unit	Unit generated from the Used Units	Automatically generated with the name of the company, if the service is created from a service (Service module) related to a quote, invoice, sale order, etc.
Total Units	Amount of planned units	Autogenerated from the number of units of the related service (Services module)
Used Units	Units usage for the service; sum of the units of all the tickets (*Status = Closed*) related to the contract service	You can associate tickets to a contract service through Select *Trouble Ticket* or *Add Ticket*
Residual Units	Difference between Total Units and Used Units	Autogenerated, not editable

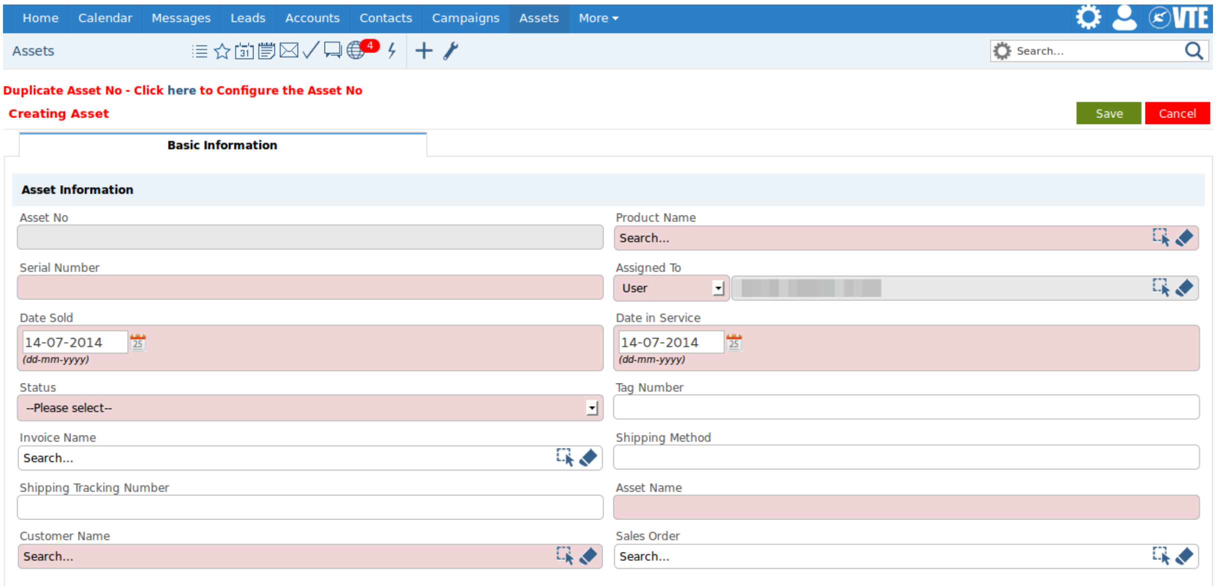
9.5 Tracking activities

The Tracking is a tool which helps you to keep the history of the time spent on your activities, especially if they are part of a "pack" of activities purchased by a customer. This tool is available in the detail view of Tickets, Accounts, Contacts and in the email (Messages). Start, pause and stop the tracking by the following commands:

When you play the tracking, the system starts to keep the count of the time passing (in terms of hours and minutes), until you play pause or stop. When you stop, you are asked to save the tracking only (in the Calendar) or save the tracking with a related Ticket.
The activities with *type = tracking* can be subject to reporting (Reports module).
***Please note!** VTE Community does not include this tool.

9.6 Assets module

The Assets module allows you to keep track of all the serial numbers that you sold/rented to your customers, or any assistance service provided on a specific product.
To create a new asset click +



An asset must be linked to:

- a product (to identify the type of good provided)
- an identification serial number
- a customer (account)
- an identification name

You can create an asset directly from a sale order that contains the product (see the Sales Orders chapter for more information).

From the account record you can see the assets sold to the company. From the asset record you can view the trouble tickets.

9.7 FAQ

VTECRM includes a FAQ module with a list of the frequently asked questions. It allows you to:

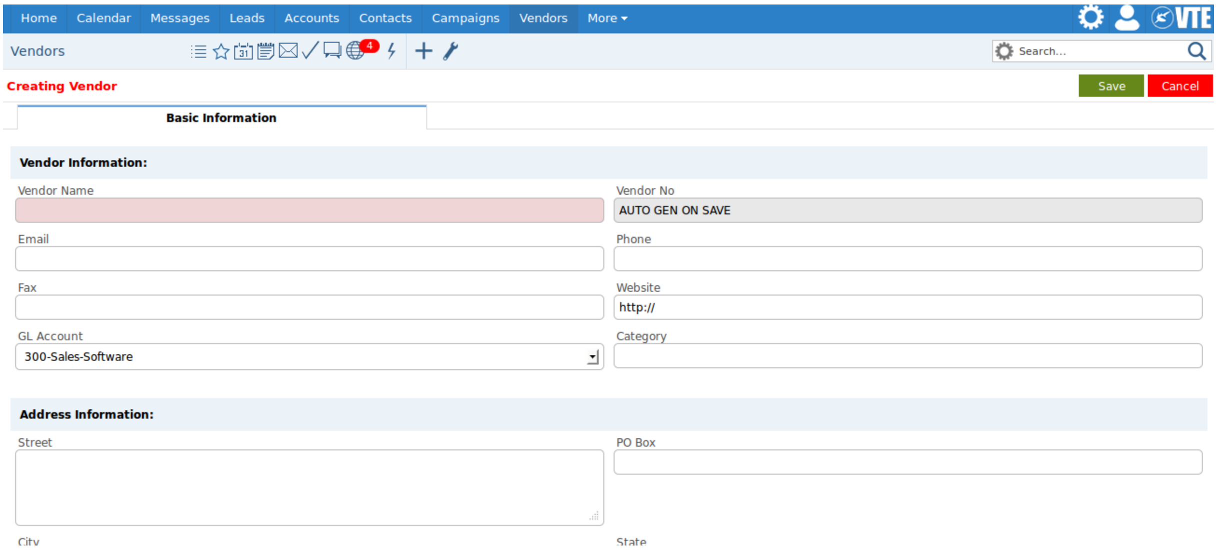
- provide a basic knowledge to your customer about products, services etc.
- inform your employees about procedures, actions, and how to answer to customer questions
- talk with your staff about which action is better to help the customers

10. Vendors and Purchase Orders

With VTECRM you can manage the passive cycle (suppliers) through the Vendors and the Purchase Orders modules.

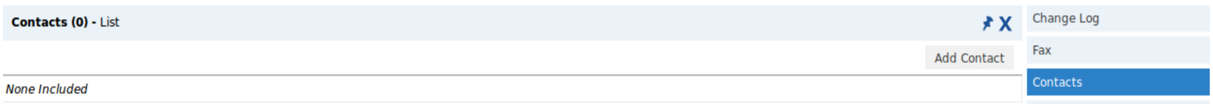
10.1 Vendors

VTECRM allows you to manage an unlimited number of vendors and products/services purchased for your company or customers. Vendors are listed separately and are not included in Contacts or Accounts.
To insert a new vendor, as usual click + from the Vendor module.



Vendor Name	Name of the supplier company
Phone	Phone number
Email	E-mail address
Website	The website of your vendor
GL Account	Vendor's category account code
Category	You can link the vendor to a category, if required

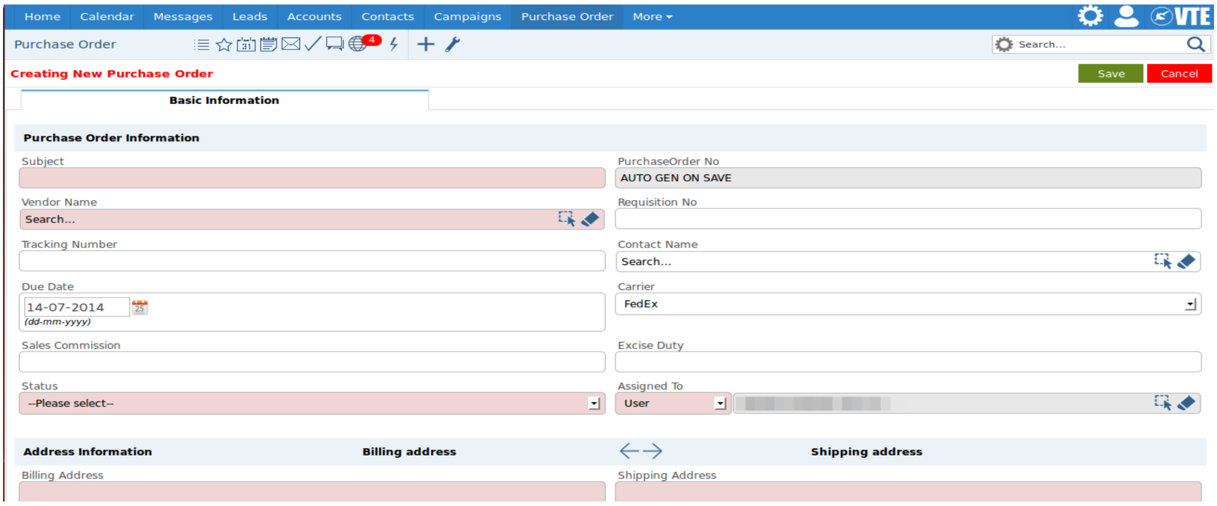
You can relate the vendor to a contact existing in VTECRM.



10.2 Purchase orders

VTECRM helps you in the purchase of goods. This may be useful if you have to buy something for your company or, for example, in order to complete sale order.
To add a new purchase order you can click the button *Purchase Order* + from the Vendors module. The details are transferred automatically in the purchase record.

Note: You can export the purchase order as PDF (see PDF Maker chapter).



Subject	A name for the order
Vendor Name	You can relate the purchase order to a vendor existing in VTECRM
Requisition No	Code (if you need it)
Tracking Number	Code to monitor the delivery (if you need it)
Contact Name	You can relate the purchase order to a contact, as your referent
Due Date	The ending date of the purchase
Carrier	Select the carrier
Sales Commission	Insert a possible sale commission for the purchase order
Excise Duty	Possible taxes
Status	At which point is the order
Assigned To	The user who manages the purchase order (as default the one who creates it)

Stock update

When *Status = Received Shipment*, VTECRM updates automatically the stock quantity: the new purchase order is added to the warehouse stock. The stock is shown in the Quantity in Stock field.

11. Project management

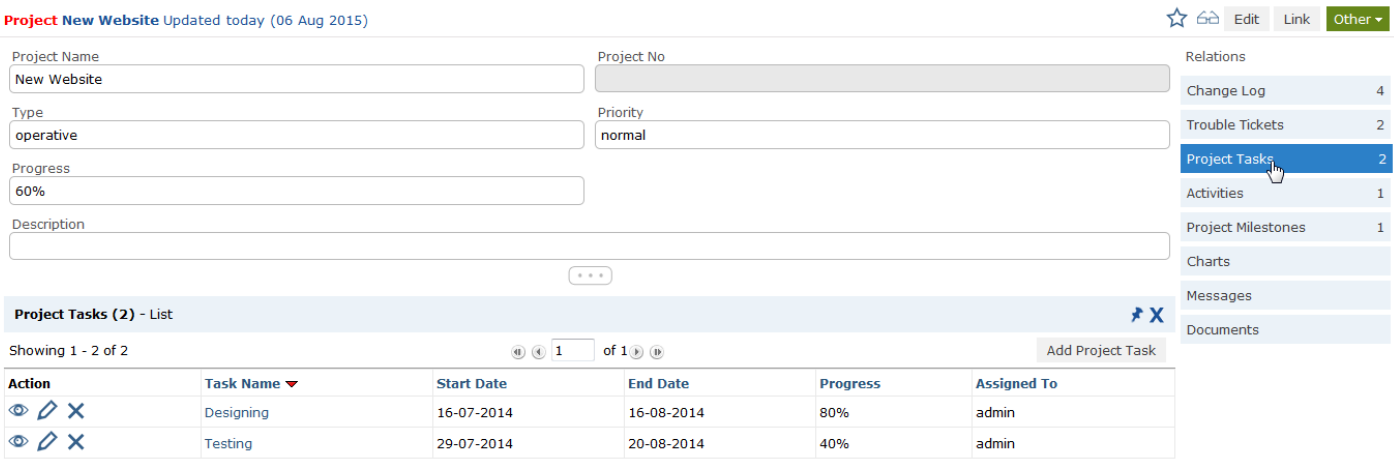
VTECRM provides you with three modules dedicated to project management: **Project Plan**, **Project Tasks** and **Project Milestones**. Tickets module also can be involved in this management, as a deeper level of the Task.

11.1 Project Plan

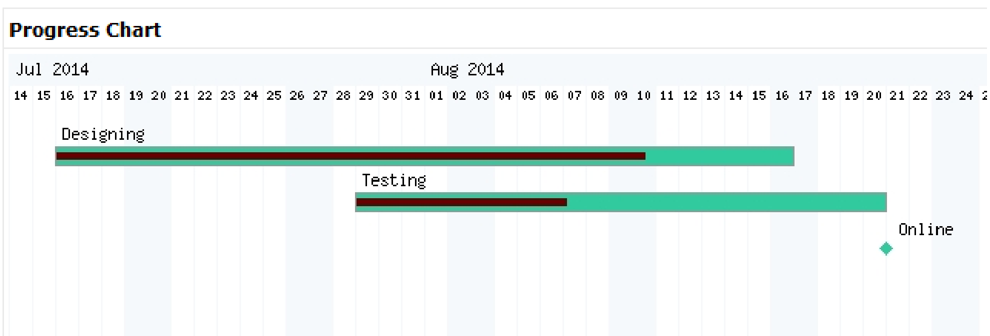
A project can involve a customer or be internal to your company. Create a new project clicking + or choosing Add Project from the related Account.

Name	Subject
Related to	Link to the Account (if the project involves a customer)
Starting/Ending date	Dates of the work
Status	The state of art, you must keep this field updated in order to guarantee an effective managing
Planned budget	Planned budget for the work

Once saved the Project, you can manage different stages, tasks and goals through related modules called Project Task and Project Milestones (deadlines). Add them by the related content menu of the main project, mantaining all the relations.

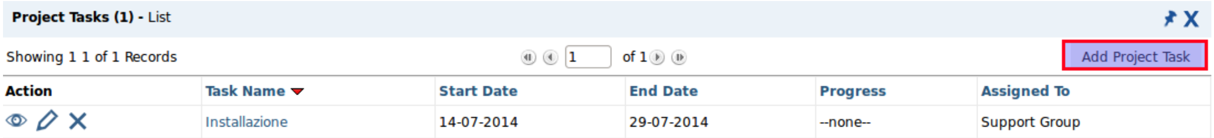


Use the Gantt to have a general overview of the job. It shows the progress of all the tasks and when the deadlines are placed. The colors in the chart are related to the users who work on the project, and are the same of the Calendar.

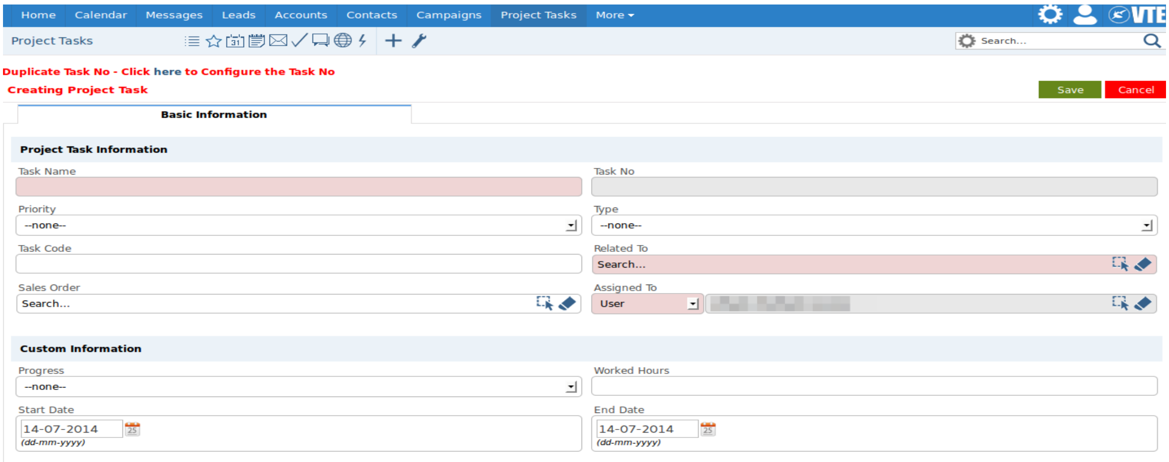


11.2 Project Tasks

Project tasks are the planned activities that the project requires. To add it from the project record, use the button *Add Project Task* from the module field.

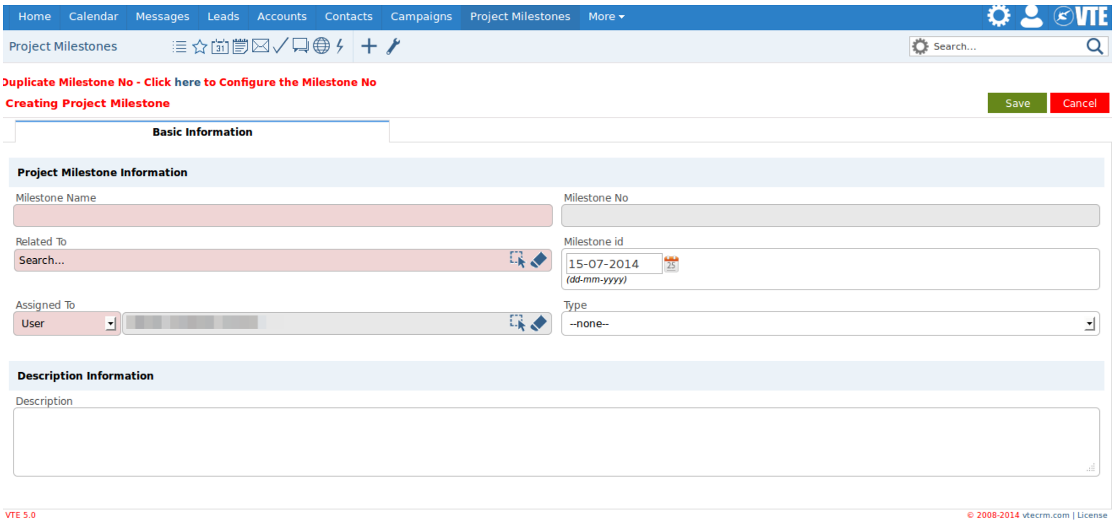


Project task information:
- Title (subject)
- Assigned to (the user who has to do this task)
- Starting/Ending date (the task is represented by a line in the Gantt graph)
- Progress (keep this field updated) Related modules:



11.3 Project Milestones

Project Milestones are like closing points.
- Title (subject)
- Date (the milestone is represented by a single point in the Gantt graph)



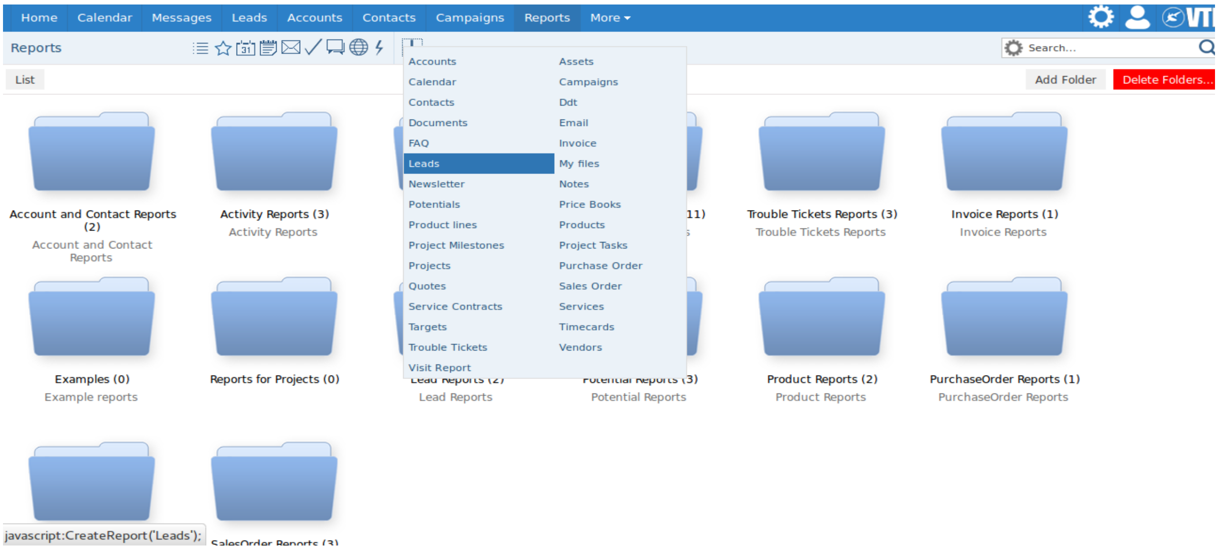
Once added from the Projects module, the project milestone record is automatically related to the project. On the progress chart, you see the milestones as points.

12. Reports and Charts

Through reports and graphs you can examine the data in VTECRM from different points of view. First you have to identify the type of extraction you want (ie: what you want to achieve?) and, from here, build a report.

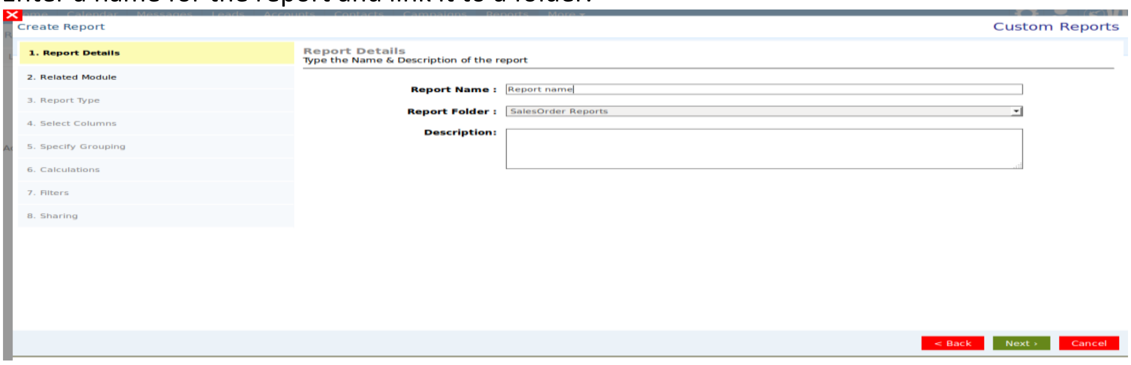
12.1 Report

The Reports module is organized in folders. You add, edit and delete folders, or choose the list view (button *List*). As you create a new report through + you have to choose the specific module on which to create the report.

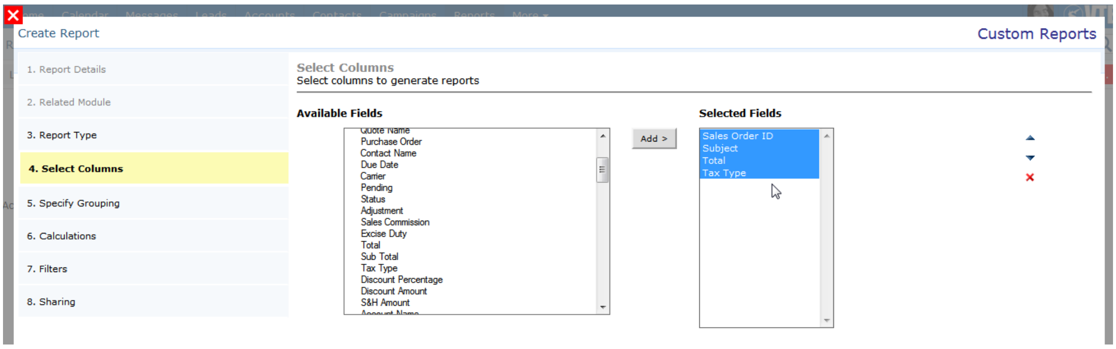


Example: you need a report that shows the sales orders related to IT companies. Follow the steps.

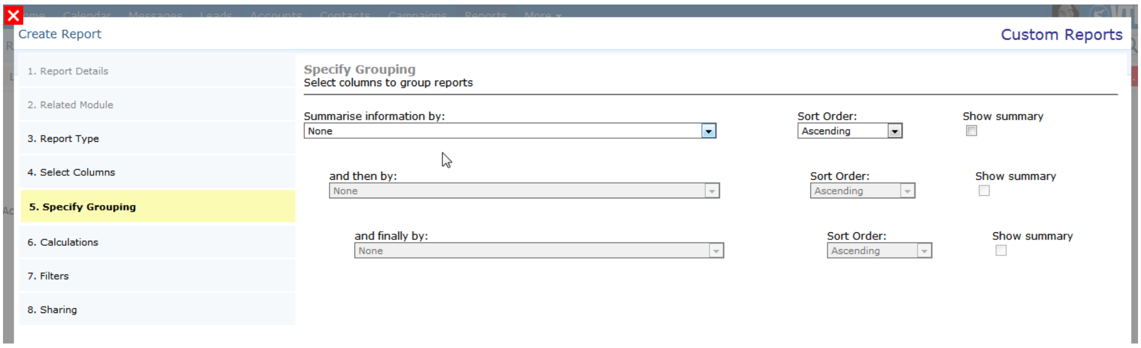
1. Enter a name for the report and link it to a folder.



2. Select the related modules from which to extract the information.
3. Choose the report type: Tabular or Summary. Only with the Summary Report you can later build a graph.
4. Select the columns.

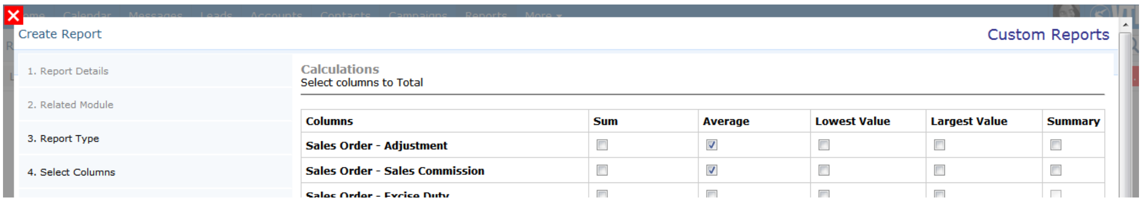


5. Specify the columns for grouping. This window appears only if before you have chosen the Summary Report.

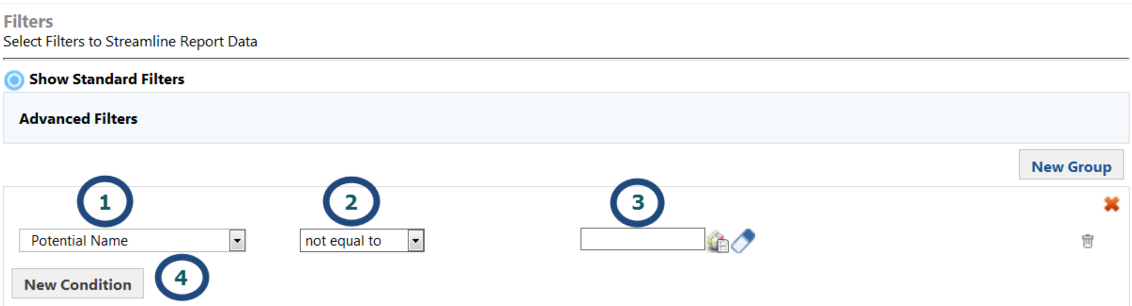


Note: Show Summary provides you the amount for each summary field. For example: you want to know the orders gathered by status. How many orders have Paid status? If you pick Show Summary for the field Status, as result you have the sum of the sales orders for each status.

6. The Calculations panel provides you some math operations: sum, average, lowest value and largest value. Pick what you want to see in the report. For example: how much is the total amount of orders?



7. Define the filter keys.



1) Choose the field
2) Choose the operator
3) Indicate the terms for comparison.

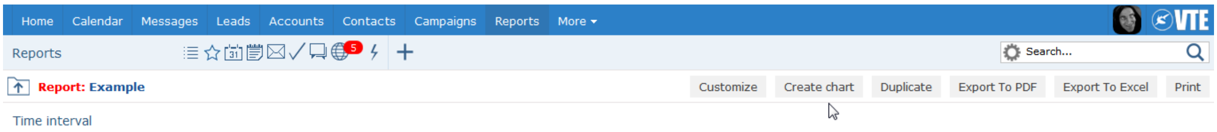
If you click  you can specify conditions that compare values from different fields.
Create a new conditions and link conditions with “and/or”.
Click the button *New Group* to create a new group of conditions, linked with “and/or”.
Note on connectors:
- “and” means that all the conditions are satisfied
- “or” means that at least one of the conditions assumes a true value
For date type fields, special options are available.

8. Select the report type.
   - Private: only the user can see the report
   - Public: all users can see the report
   - Share: choose with which users to share the report

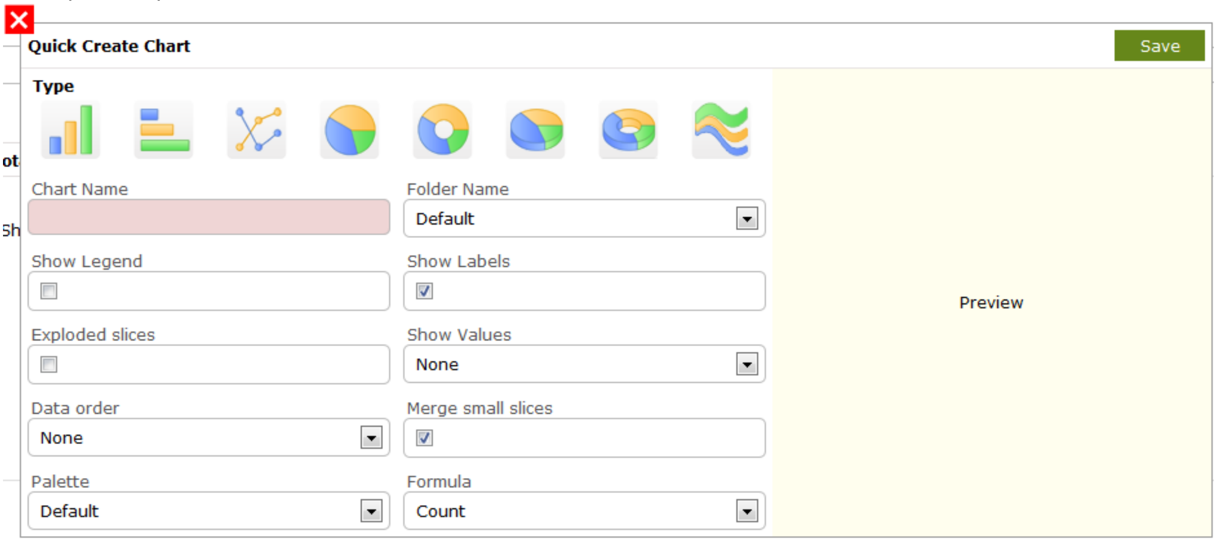
   What you share is not the content of the report but its structure. The data view depends on the access privileges of each user, defined by the administrator.

12.2 Charts

The report can be displayed as a chart. Once created the report, click the button *Create chart* (on the top bar).



The creation panel opens.

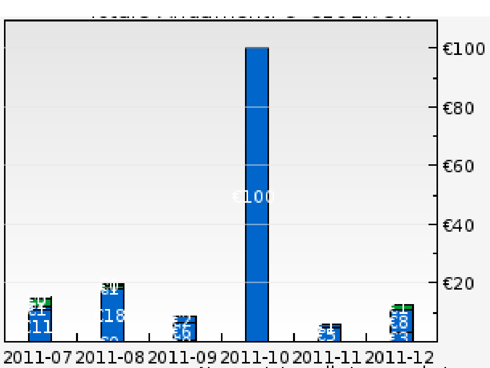


Type	Type of graph: bar, column, line, pie, etc.
Chart name	A name for you chart
Show Legend	Enable to display the legend/key
Show Labels	Enable to display chart labels
Show Values	Choose if you want numerical values or percentages
Folder Name	Related folder (charts are organized in folders like the reports)
Formula	Choose if you want amount, sum, average, minimum or maximum
Palette	Choose the chart colors
Data order	Define an kind of order

The graphs are available in the Charts module, organized in folders as the Documents module.
A chart can be showed in the user Home Page.

12.3 Dashboards

The Dashboard module offers some default, pre-configured charts, that provides you an immediate overview about leads, accounts, sales, products, etc.



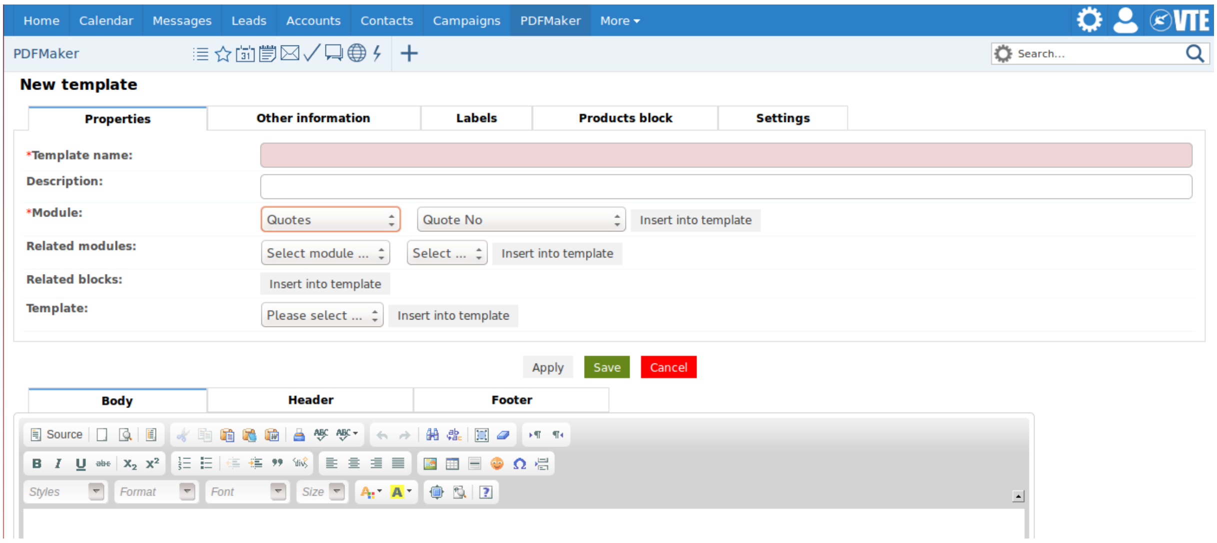
13. PDF Maker

13.1 Create a PDF template

The PDF Maker creates PDF or RTF documents in order to export VTECRM data. This module allows you to create and customize templates based on the "mail-merge" logic.

To create a new template for PDFMaker module click +. Then, enter a name for the template, a possible description, and select the module related to the template (it means that the template is available in the selected module).

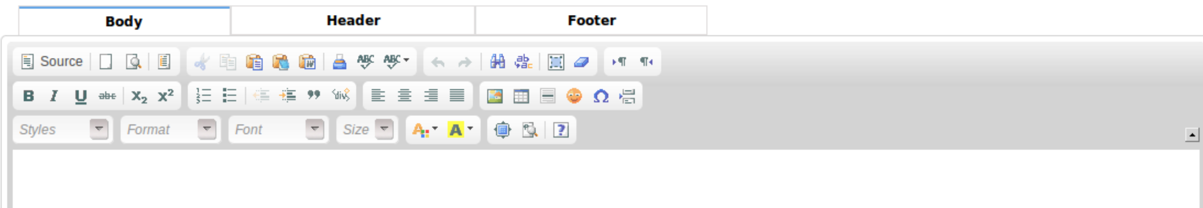
***Please note!** VTE Community allows to create 1 template per module only.



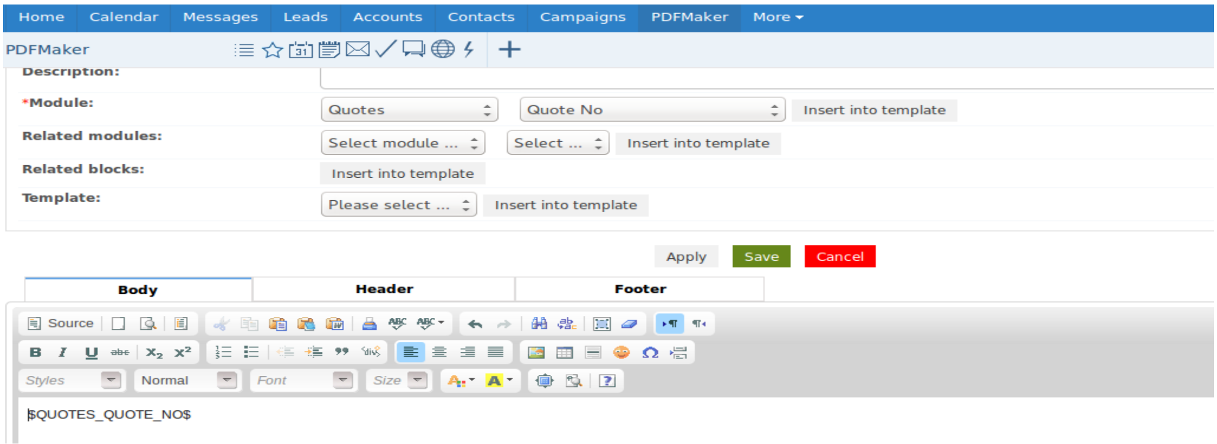
The content is organized in three sections:

- body: main body of the template
- header: repeated in each page
- footer: repeated in each page

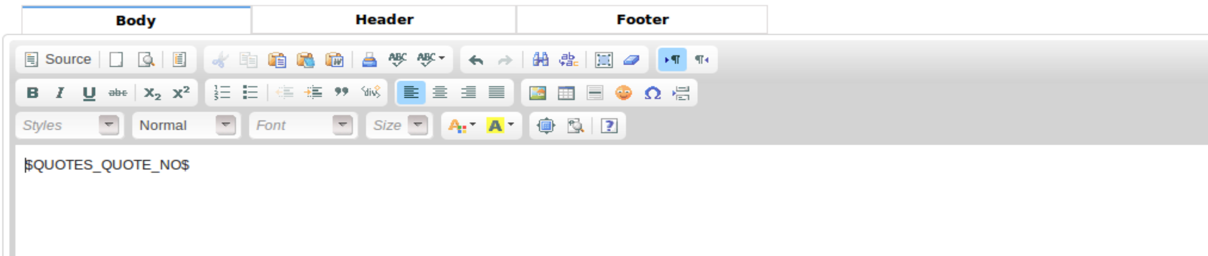
FIXED TEXT



- variables: replaced by data during the PDF/RTF export. Select the variable related to the module and place it into template, wherever you want.
  For example: place the quote number at the beginning of the document.
  1) place the pointer in the text (click)
  2) choose the variable
  3) click *Insert into template*



Then you can apply styles of text (both fixed text and variables) through the editor. You can also act on HTML.



VARIABLES

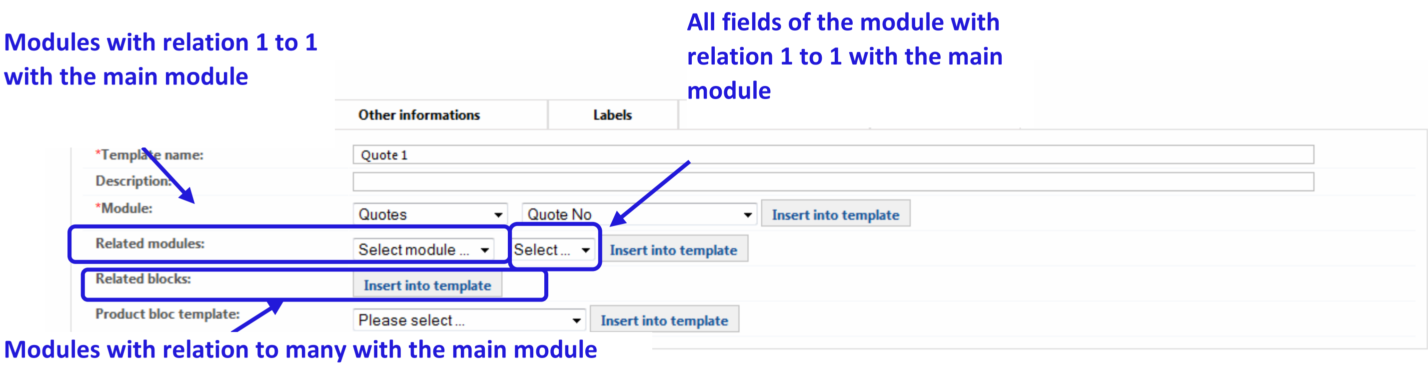
You can insert variables also from the modules related to the main module.

- Modules with 1 to 1 relation with the main module (ex: a quote is related only to one account). 1 to 1 relations recognize the presence of a field, in a record, linked to an another VTECRM module.

Example: in the Quotes module you find the field Account Name, with the related account.

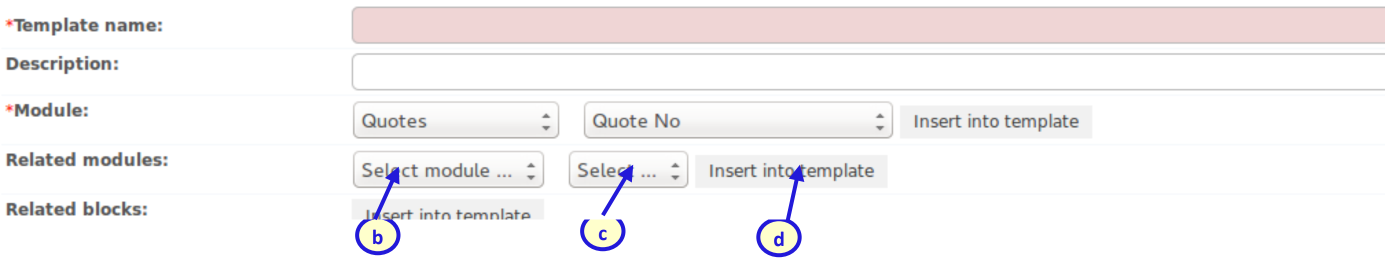
- Modules with multiple relations with the main module (ex: a quote is related to many sales orders). Multiple relations recognize the presence of related lists.

Example: in the Quotes module you find the Sales Orders panel.



1 to 1 relation

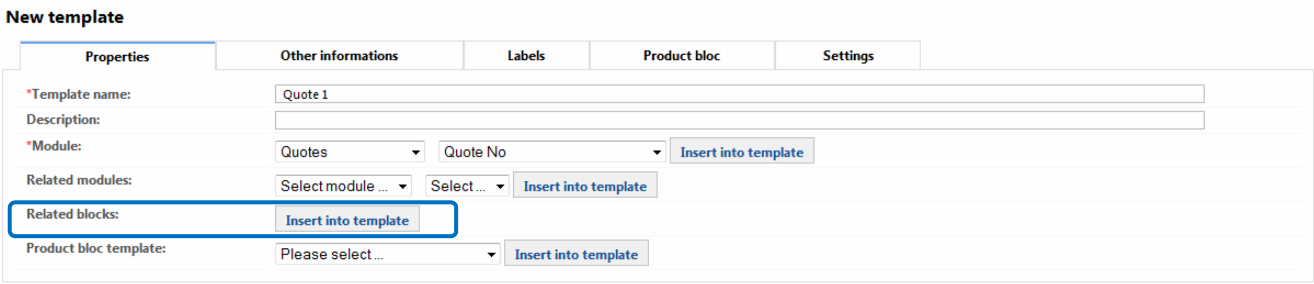
1. place the pointer in the text where you want to insert the variable
2. choose the related module
3. choose the field to insert
4. click *Insert into template*



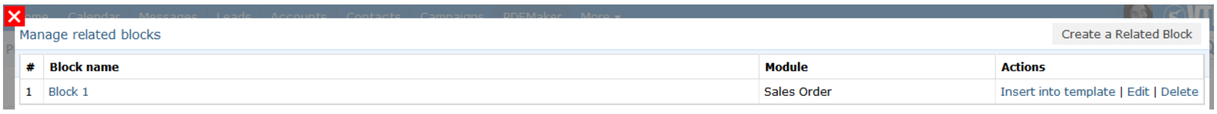
Multiple relations

a- place the pointer in the text where you want to insert the variable

b- in the field Related blocks click *Insert into template*

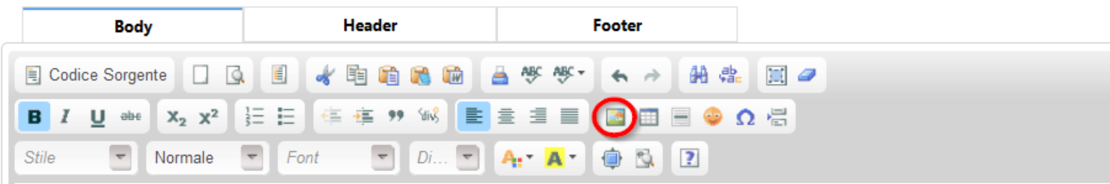


You can select an existing block (be sure that refers to the module for which you are making the template) or Create a Related Block.

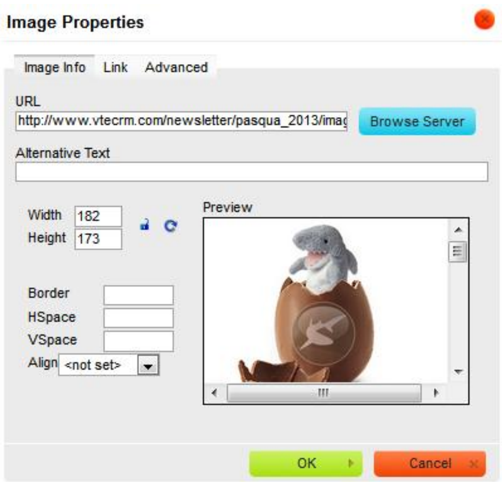


13.1.1 Insert images

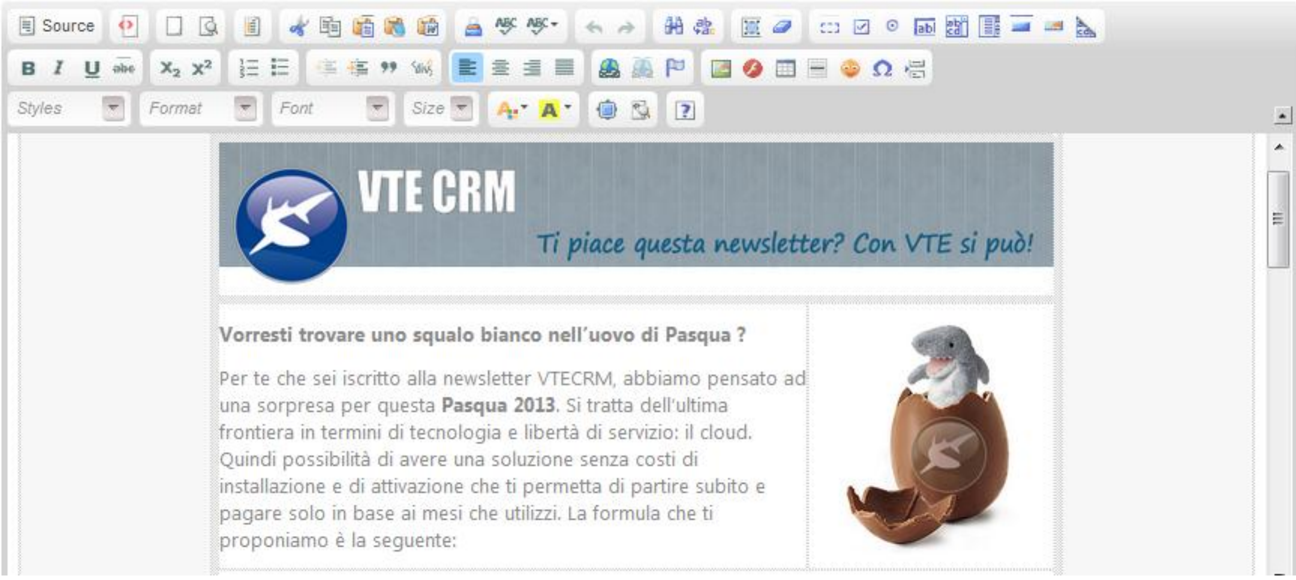
Press the *Image* button in the editor panel.



Enter the image URL, or search it on the server.

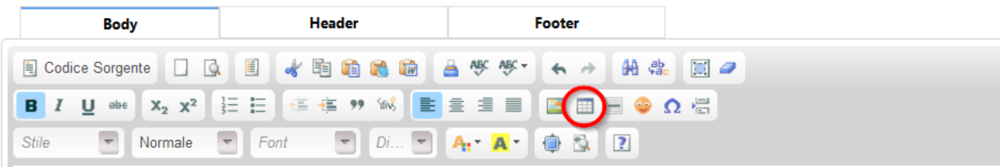


Press OK to insert the image into the template.

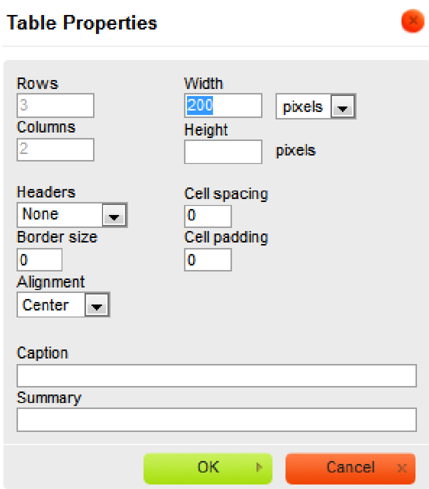


13.1.2 Insert tables

Click the *Table* button on the editor panel.

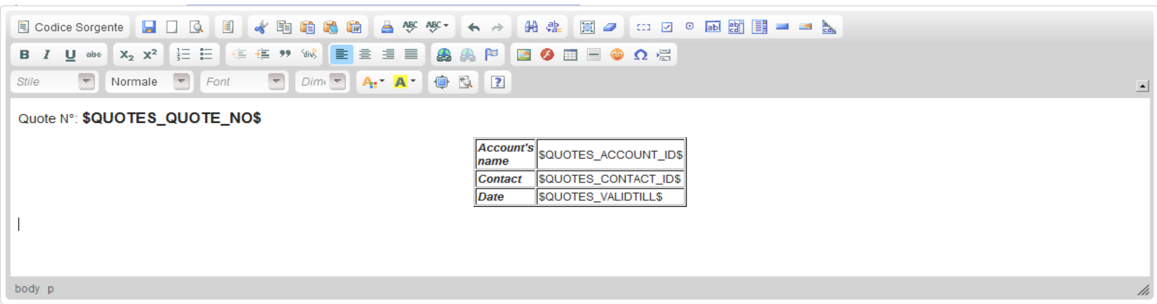


Enter table properties.



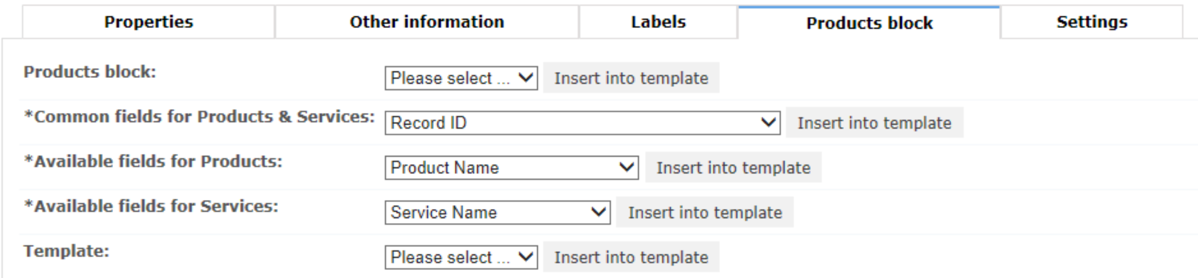
- Border size: 0 if you don't want a border
- Cell spacing: space between two cells
- Cell padding: space between the cell border and its content (text)

Click *OK* and the table appears in the template. Fill out the table with text and variables. To modify again the table properties you have to click the right mouse button.

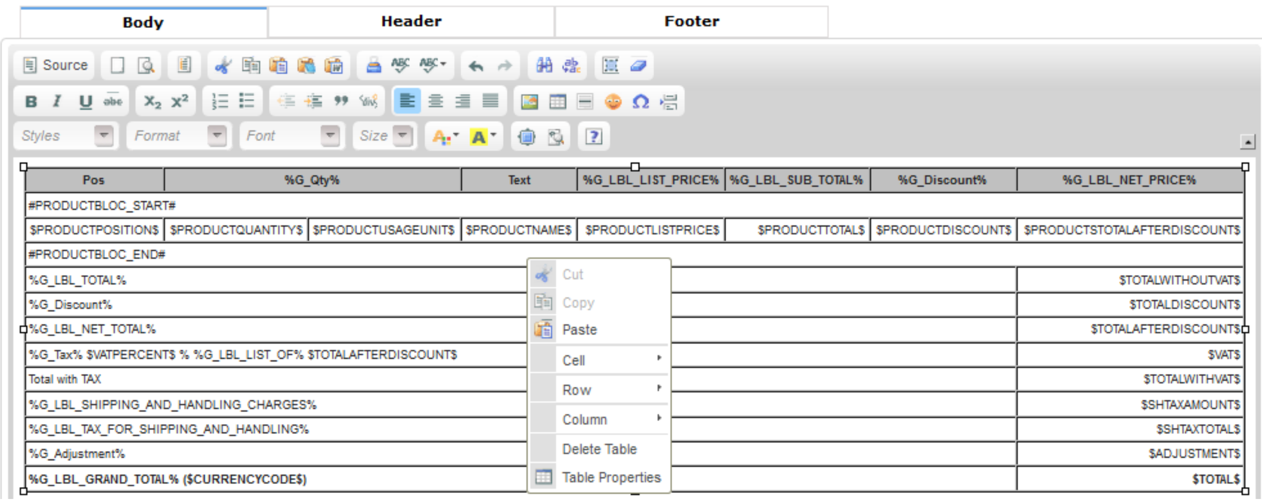


13.2 Product block

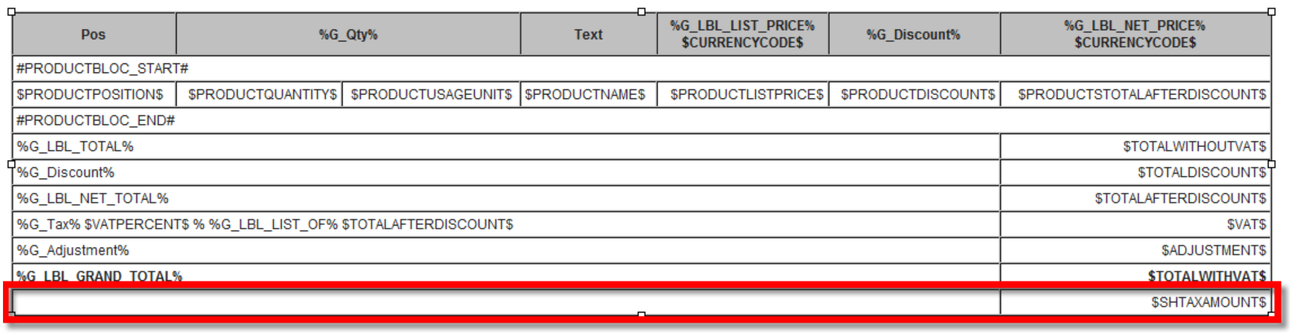
In Quotes, Sales Order, Purchase Order and Invoice modules you can insert a product block into the template. There are default product block templates that can be inserted quickly. Select the block type and click *Insert into template*.



The block appears as a table. You can modify it as you do for a table.



After adding a new cell you can enter new variables.



You can create customized tables for the lines. The basic structure has to be like the following:

- a line with the header of all columns

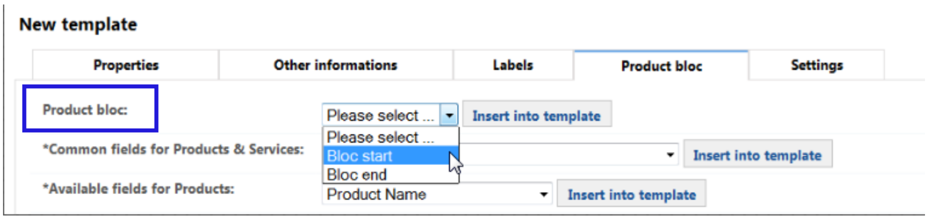
- a line with the tag *#PRODUCTBLOC_START#* which marks the beginning of the section that repeats on each line

- a line with the line variables

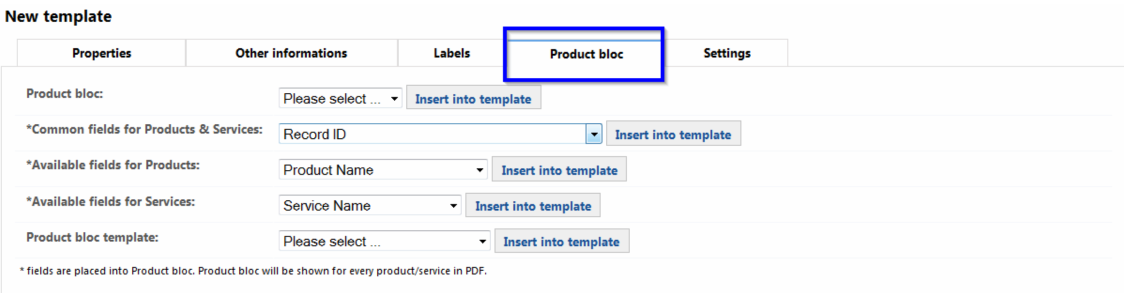
- a line with the tag *#PRODUCTBLOC_END#* which marks the end of the section that repeats on each line

heading_1	heading_2	heading_3	heading_4	....	heading_n
#PRODUCTBLOC_START#					
variable_1	variable_2	variable_3	variable_4		variable_n
#PRODUCTBLOC_END#					

The beginning/end tags of the block can be inserted in the same way of a variable.

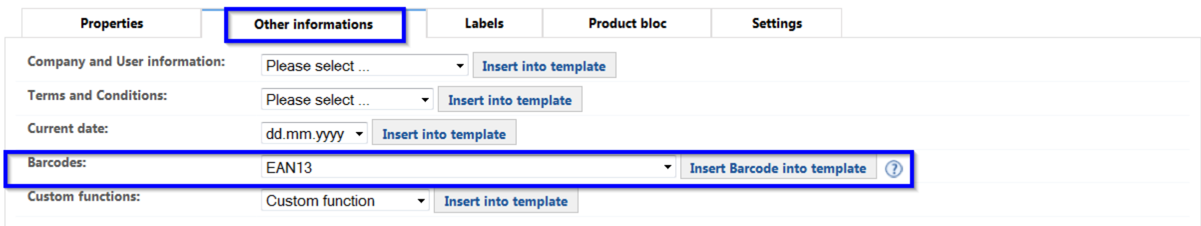


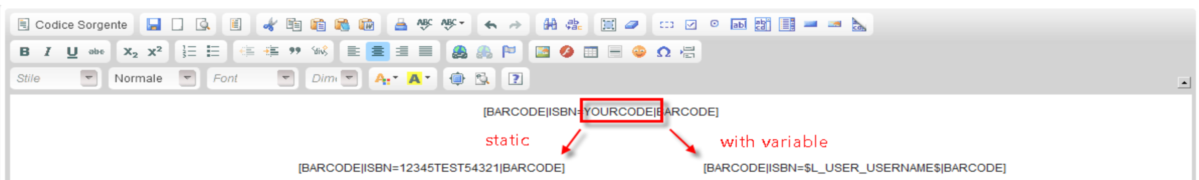
You can insert the variables of the product block through the functions you find in the panel.



13.3 Barcode

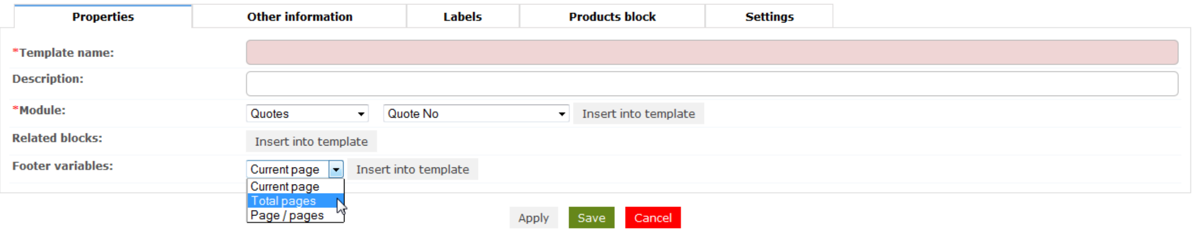
Through the tab Other information you can insert barcode into the template. The barcode can be static or with variables.





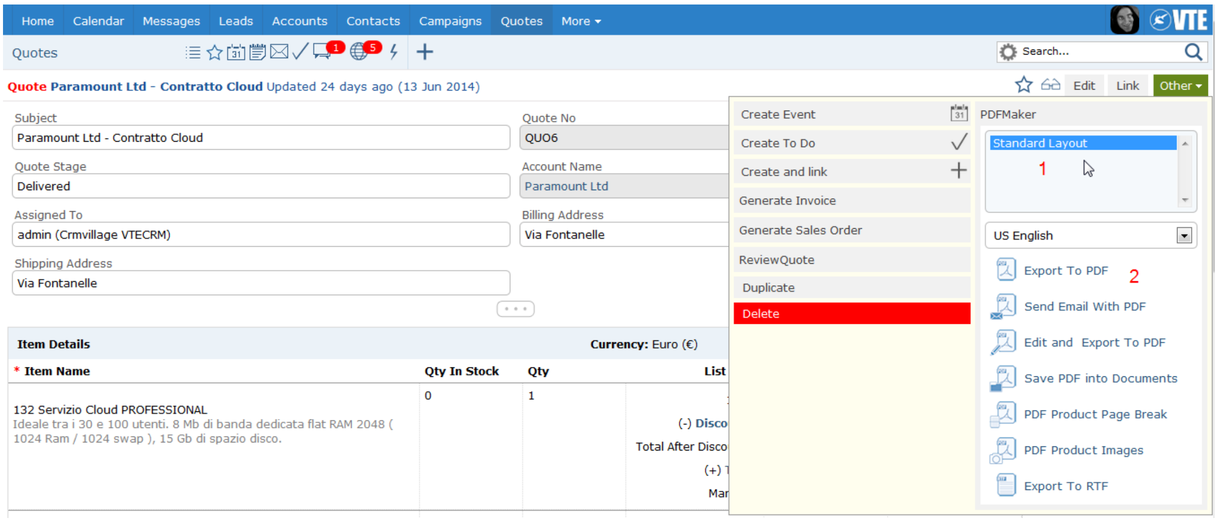
13.4 Footer variables

The Header/Footer allows you to insert special variables like current page or total pages. You can also insert variables from the module.

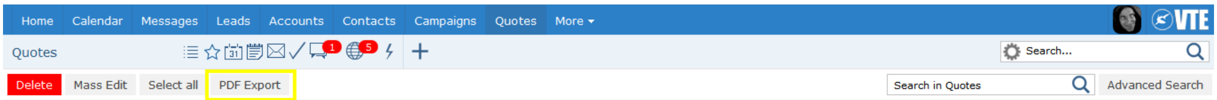


13.5 Export to PDF/RTF

To create a PDF/RTF access to the module you need (for ex: Quotes). On the right side, you find the PDFMaker panel and some export options. Choose the template (1) and click *Export to PDF* (2) or *Export to RTF*.



It's possible to create a mail-merge PDF for many module. From the list view, select the records and press the button *PDF Export* on top left.



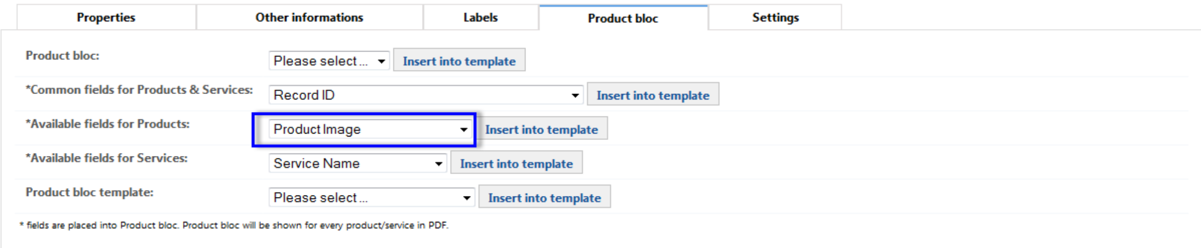
Choose the template and press Export to PDF.

13.6 Page Break

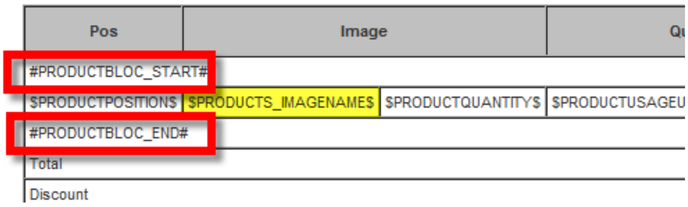
In the modules with product blocs, you can define some Page Breaking Points in correspondence to specific products/services. Find the tool in the PDFMarker panel (*Other > PDF Product Page Break*).
Then select products/services. You can also choose if you want to repeat the table header or if you want to display a subtotal.

13.7 Product image

Into product bloc templates you can add product images.



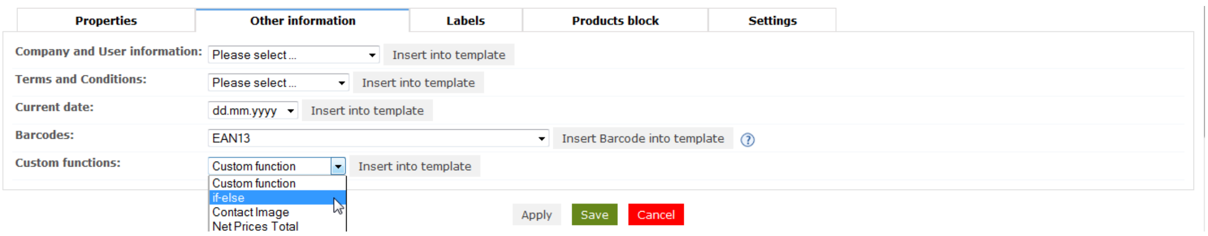
The variable *$PRODUCTS_IMAGENAME$* has to be inserted between tags *#PRODUCTBLOC_START#* and *#PRODUCTBLOC_END#*



During the PDF creation click *Product Image* and choose the image for each product. You can modify the image size (width and length; if one value is empty VTECRM resizes the image proportionally; if both the values are empty the image maintains its original size).

13.8 Customized functions

You can define custom functions to manage data through the PDFMaker. To add a customized function place the PHP file with the code of the function inside the folder *modules/PDFMaker/function*. The file will be included automatically. In the folder there is the function *its4you.php* : don't modify this file, changes will be overwritten during the next application update.
To add a customized function to your template open the tab Other information, choose the function and click *Insert into template*.



Example: *if-else*

If you choose the function *if-else,* in the template appears the following text:

[CUSTOMFUNCTION|its4you_if|param1|comparator|param2|return1|return2|CUSTOMFUNCTION]

You have to replace:

param1 : control field

comparator : term of comparison, possible values: = != (not equal) > <

param2 : term of comparison

return1 : value to show if the condition is verified *return2* : value to show if the condition is NOT verified

Example: the final discount in the quote is printed only if it's not invalid.

How to configure the function?

[CUSTOMFUNCTION|its4you_if|$TOTALDISCOUNT$|!=|0,00|Discount $TOTALDISCOUNT$ €||CUSTOMFUNCTION]

13.9 File name

In the tab Settings of the PDFMaker you can define the name of the exported file according to your needs. You can combine text strings, module variables and standard variables (template name, current date, etc.)

13.10 Import/export templates

You can import and export templates in XML format from the PDFMaker module, through the buttons ↓↑.

14. Users hierarchy and privileges

The Users & Access Management section, in the Settings menu, allows you to define and customize the users of VTECRM in order to guarantee the safety and the privacy of the data.
Through Users, Roles, Profiles, Sharing Access, Advanced Sharing Access and Groups you can decide which users can access specific VTECRM areas. We recommend to begin defining the users only after decided the processes to manage in your company. VTECRM provides an Administrator type of user, the only one allowed to access to all the features.
The user and access management is essential, for example, if you are working for many companies: you can manage leads, contacts, accounts, potentials, products, price books, tickets, activities, etc., for each company.
Furthermore, you can keep under control the usage with the possibility to see "who did what". Through Audit Trails you see what is doing a certain user, and maybe modify later its privileges.

The Roles simplify the management of security and data access: you don't have to create a new profile every time you add an user; you just associate the user to an existing profile.
Typically, in mid-large companies the roles management is essential when:

- dozens of users have different roles in a complex hierarchical structure
- dozens of users are working simultaneously with the CRM
- you need to control the privileges of reading, editing and deleting for each user

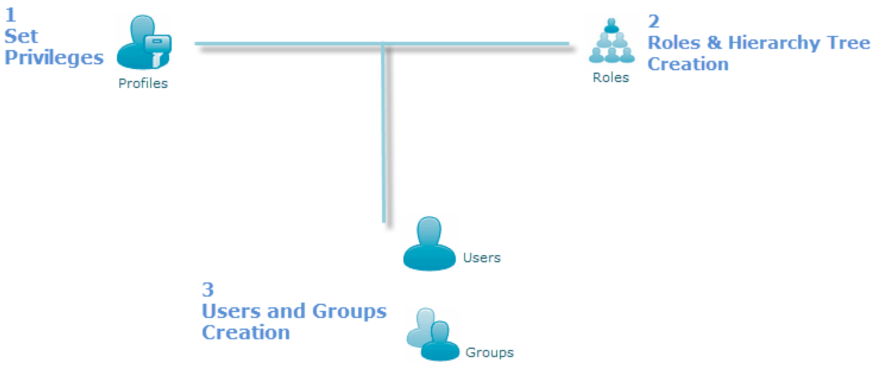
In VTECRM there are two types of users:

1. Standard user
2. Administrator user

The standard user has a limited access to VTECRM and can't access to Settings menu.
The administrator user manages all the VTECRM data and features:

- users, groups and their privilege access
- customize the users interface
- create communication archives
- change passwords, disable users and view the login history
- manage CRUD* operations for VTECRM data

* CRUD operations are data reading, creation/modification, cancellation.



14.1 Profiles

Profiles are used to define the privileges of each user towards data and views. You can decide which fields the user can see, which data he can modify, which data are considered private and/or public. Here you define, for each user:

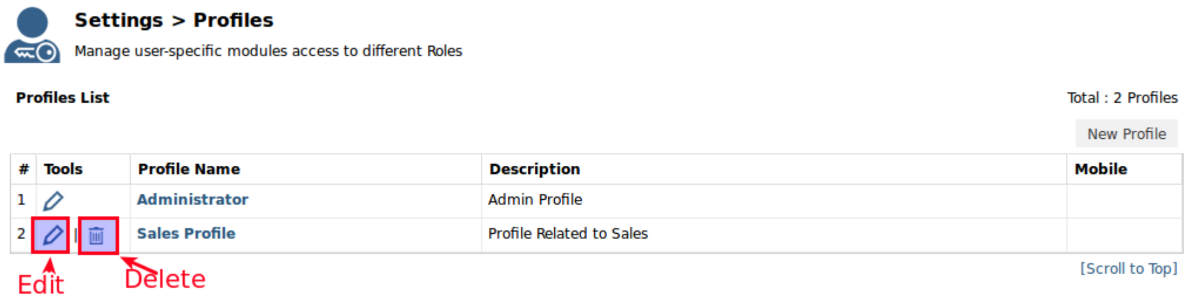
- which modules to access through the main menu
- which modules to access completely
- which modules to access partially
- which fields, inside a module, to see/edit
- which modules to export/import data

and more.

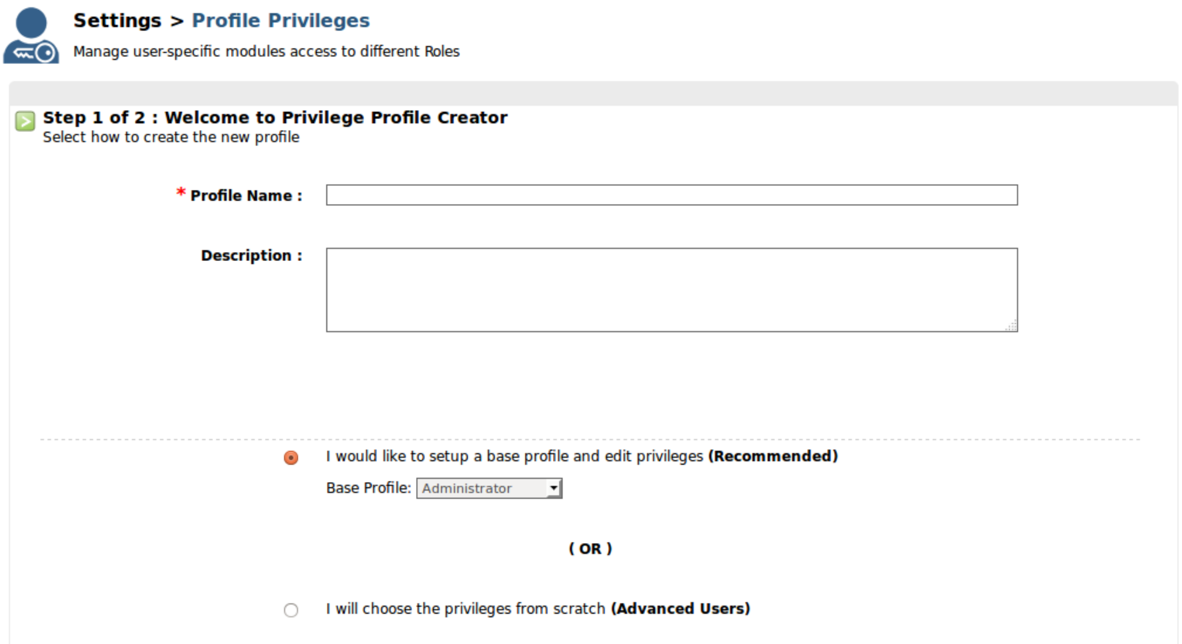
Types of privileges:

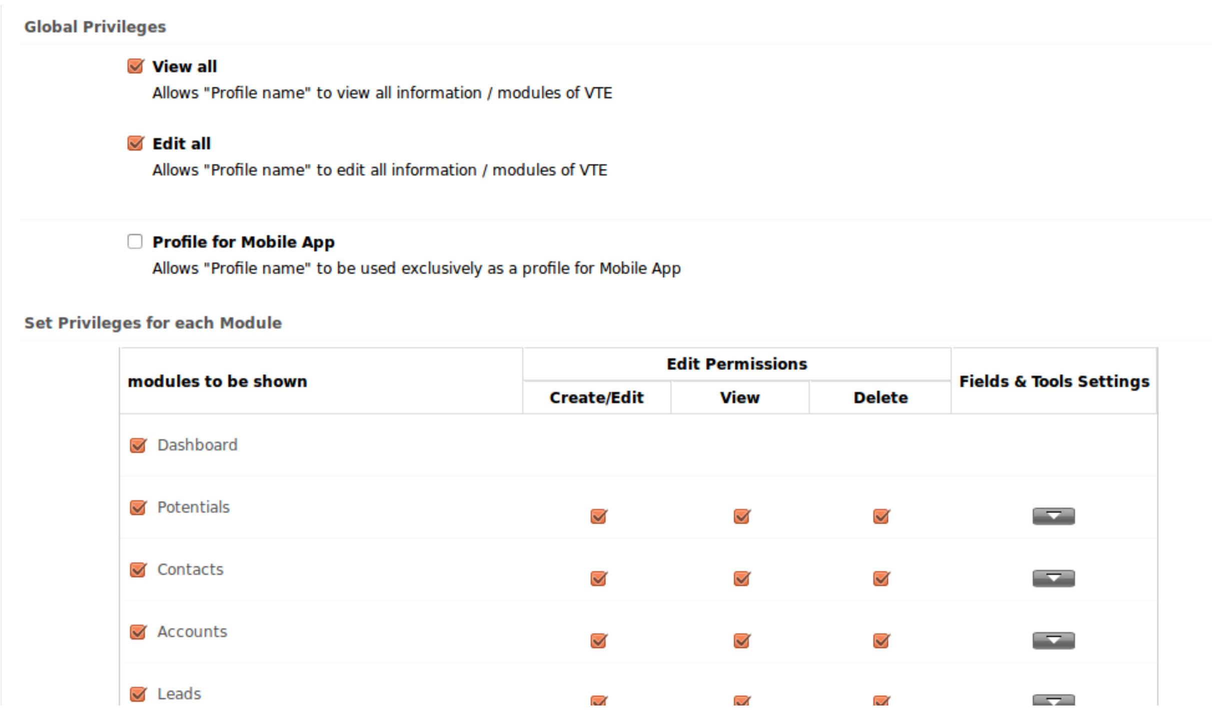
Global Privileges	When you create a profile, the global privileges allow you to decide which information/modules the user can see, create, edit and delete. *View all:* allows you to view all information/modules of VTECRM *Edit all:* allows you to edit all information/modules of VTE
Field's Privileges	You can decide which CRUD functions can be made for each field
Settings	You can make decision about functions as import/export, leads conversion, etc.

To see the profiles list and create a new profile, go to: *Settings > Profiles*



New profile.





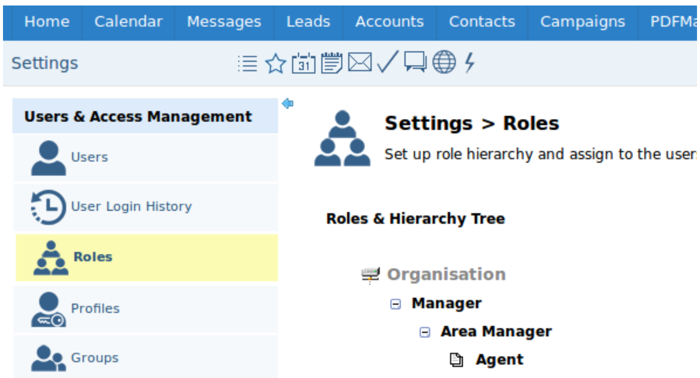
Set detailed access privileges for each module, or choose a general privilege:

- view all: allows to view all the information/modules of VTE
- edit all: allows to edit all the information/modules of VTE

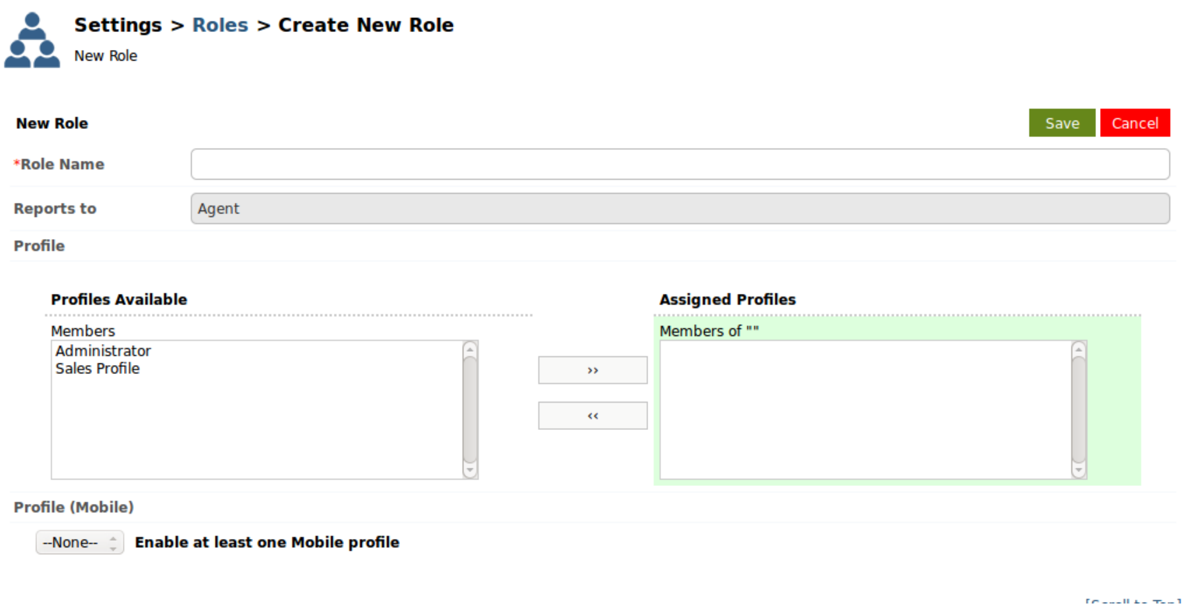
14.2 Roles

Roles are the basis of the security system. Each role is based on one or more profiles. Admin defines roles which respect the hierarchical structure. The access to the data is controlled by the roles, if the Shared Access is set on Private (otherwise, Public means that everybody see everything, avoiding roles).
In this way, for example:

- Manager (highest role) sees the data assigned to him, to Area Manager and to Agent (field: *Assigned To*)
- Area Manager sees the data assigned to him and to Agent
- Agent can see only his own data



Once you have configured the profiles, you can create roles from *Settings > Roles*
Create a new role through the button + near the higher role in the hierarchy. The new role will be a subordinate.

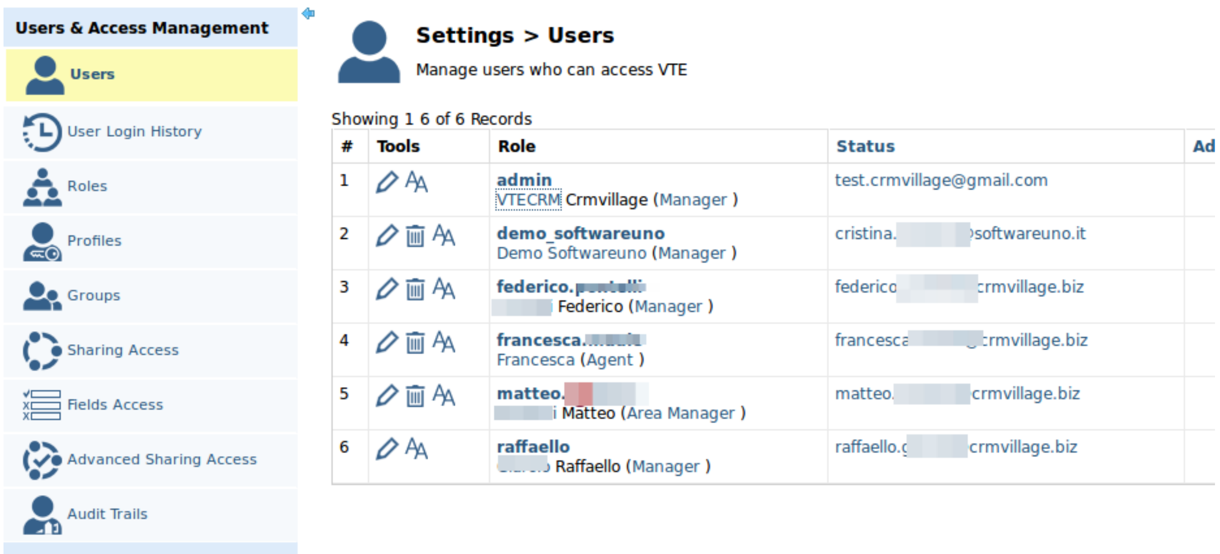


1. Enter a name for the role
2. Associate profiles to the role

Defining the role hierarchy makes an effect on the users involved, in terms of access to records (according to the rules explained in the following chapter, Sharing Access).
***Please note!** VTE Community allows to create 2 roles only.

14.3 Users

In this Settings section you can manage security, roles and access privileges. To create or manage users, click *Users* and act on the user list, as in the figure below.
Note: When you delete one user, VTECRM asks you to assign his data to an another, that you have to select.
It's not possible to delete the admin user, which is a default VTECRM user.
Only the admin user can modify settings.



1) Create a new user. Enter the main information.

User Name	One user name per user. Special characters (ä, ö, ü, ß, % ...) are not allowed. The user name, once created, can't be modified; password can be modified
Login via LDAP	Select if it's enabled. For more information see the chapter LDAP Configuration
Admin	Enable only if you want to create a user with admin privileges, no matter of the role
Status	Active or Inactive user; Inactive means the user can't login VTECRM
Role	The related role must be created before the user

2) Other information.

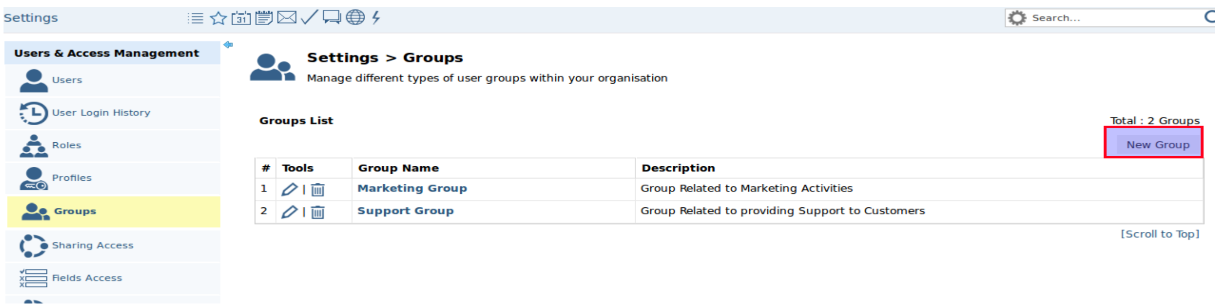
Custom Sharing Rules owner based	Enables the user to access records assigned to a different user. Expand the section, click *Add Privileges* and configure the rules.
Advanced Sharing Rules filter based	List of Advanced Sharing Access Rules enabled for the user. See the chapter Advanced Sharing Access
My Groups	List of the groups the user belongs to
Login History	Displays the user login history
Project Settings	For more information see the Projects chapter

14.4 Groups

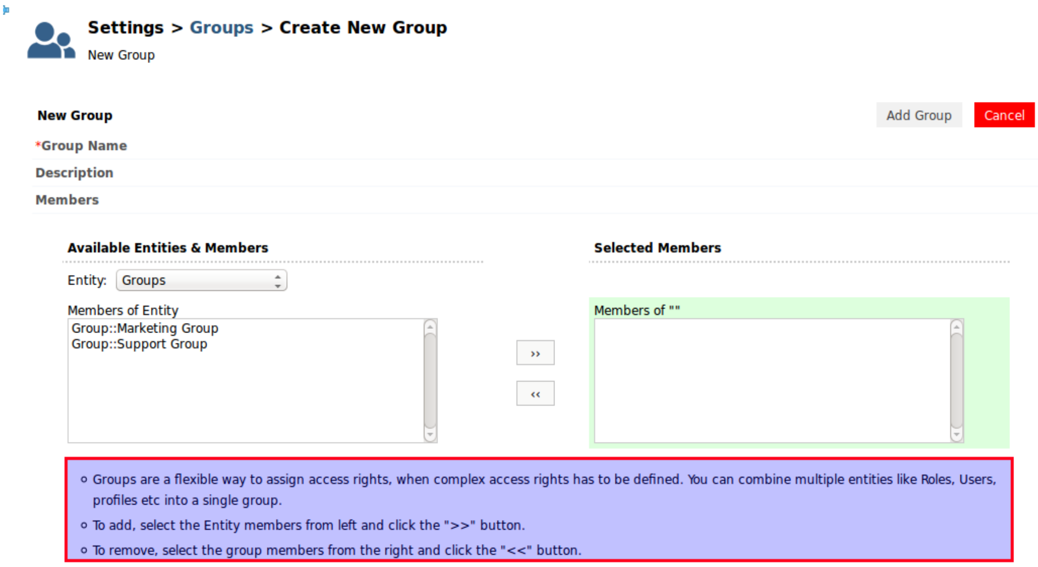
Groups are useful tools to cluster users that belong to the same working team. The *Assign To* function is based on groups.

For example: you have got a ticket from a customer, and depending on the type of request you can assign it to a specific VTECRM group. Then the group decides which user, among its members, have to solve the ticket.

To see the groups list and create a new group, go to: *Settings > Groups*



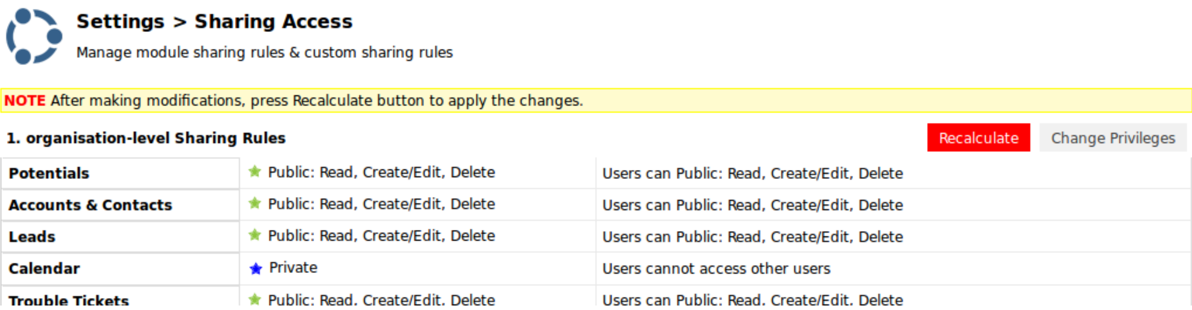
Groups can be made of users, roles and/or other groups.



14.5 Sharing Access

VTECRM allows you to set the access privileges for global access roles and customized roles, in order to meet the company needs.

You can establish access rules to apply for all roles and, at the same time, assign different rules and exceptions only to specific roles.



Note: Every time you make changes, click *Recalculate*.

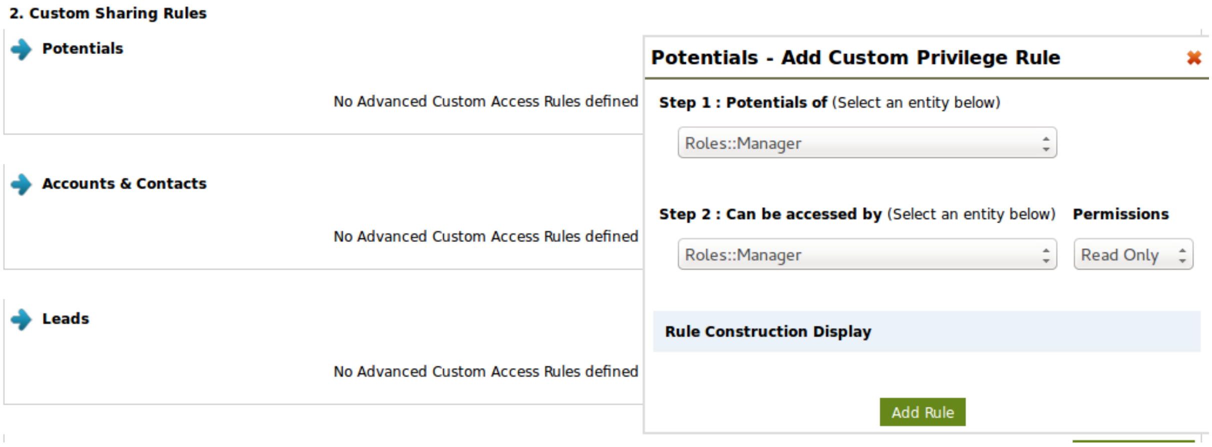
Shared permissions:

Private	Only the owner of the VTECRM entity and users with a higher hierarchy role can read, publish, delete and edit data.
Public: Read only	All users can see entity data. Only the owner and users with a higher hierarchy role can publish or delete these data.
Public: Read, Create/Edit	All users can see, create and edit entity data. Only the owner and users with a higher hierarchy role can delete these data.
Public: Read, Create/Edit, Delete	All users can see, edit and delete all data.

Note: When the Account module is set as Private, also the access to linked Quotes, Tickets, Sales Orders and Purchase Orders modules is set as Private.

If you apply access rules to some modules, these are extended to the emails related to the modules.

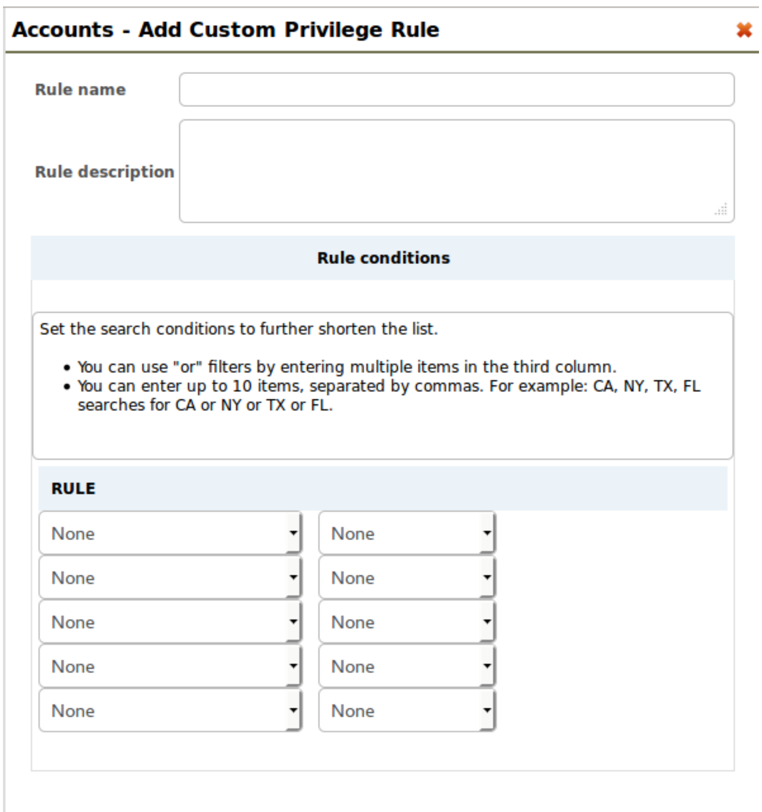
You can define exceptions to the permissions defined by the role hierarchy, as in the figure.



1) Click *Add Privileges* for the module you want to create the exception
2) At Step 1 select the role owner
3) At Step 2 select the role to which you want to extend the visibility
4) Select the permission: Read Only or Read/Write

14.6 Advanced Sharing Access

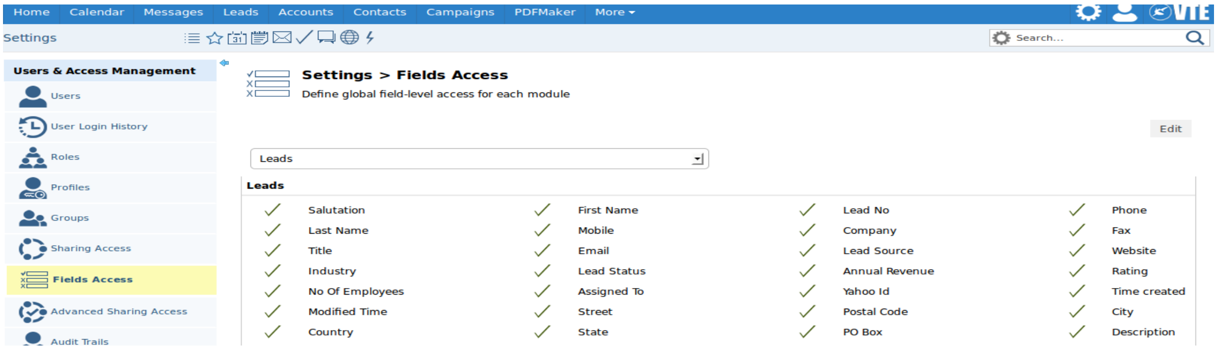
You can extend the access permission for each user and for specific modules, creating rules made on filters.
Example: the Agent London have to access to accounts with field *City = London*.
Add a Custom Rule related to the module and configure it (ex: *City = London*).



From the user list (see User configuration) open the user overview and relate the rule to it.
***Please note!** VTE Community allows to create 1 rule per module only.

14.7 Fields Access

It allows you to show or hide fields within the modules. As default, all the fields can be seen (as in the figure).



Note: You can't disable mandatory fields. Fields Access rules prevail the Profiles rules.

14.8 Audit Trails and User Login History

This feature allows the administrator to keep under control every user and every action, and to know "who did what".
The control can be disabled. The administrator can access to the users login history.

15. How to customize VTECRM: advanced settings

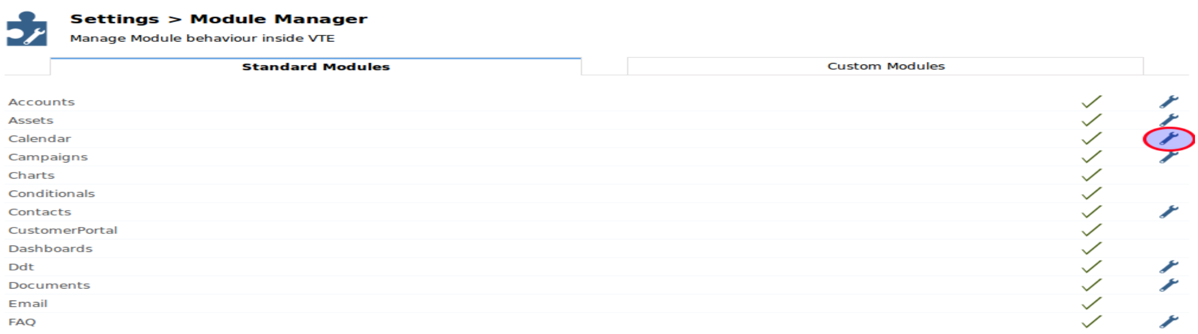
Customize VTECRM is essential in order to manage every kind of business process. For example, you can redefine the content of lead, contact and account records; it is possible to add any type of fields (text, number, percentage, picklist…).
Once you have the structure you can create work lists based on the new fields; you will be able to search any information you need through customized filters.
We recommend to customize VTECRM following these steps:

- customize the modules
- redefine lists with the new customizations
- redefine privileges and users access

The privilege access for customized fields can be managed for each user, as explained in the dedicated chapter.

15.1 Module Manager and Layout Editor

You can customize data fields for most of the modules. Go to *Settings > Module Manager*
Select the module you want to change (click on the setting icon).



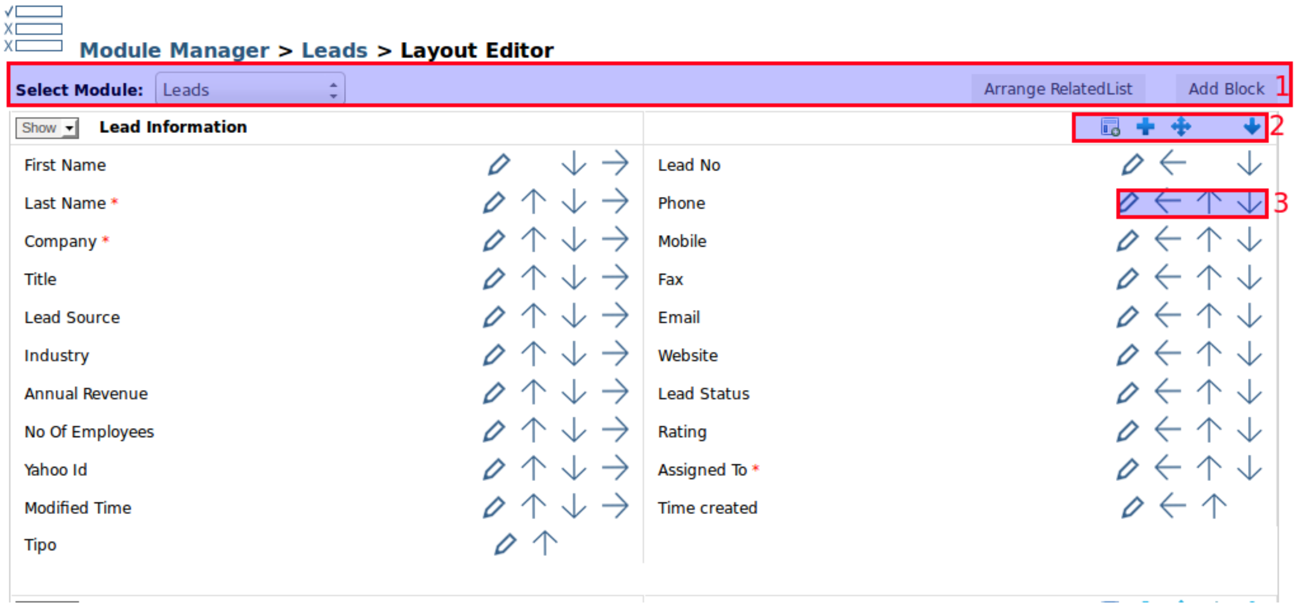
Then you have some option.

- Layout Editor: configures the Leads module (add new fields, change existing fields)
- Field Formulas: calculation functions on custom fields
- Leads CustomField Mapping: only in the lead module. Leads customized fields can be related with Accounts, Contacts and Potentials; during the lead conversion all the data are transferred into the records
- Workflow: automatic process rules

15.1.1 Customizing fields

To customize fields, choose the Layout Editor.

VTECRM



1) select the module; arrange related list (modules related to the main one; add field blocks to the page
2) display hidden fields; add a custom field in the block; move fields between blocks; move up/down
3) edit field properties; move the field up/down; move the field right/left

Table of Customized Fields Types:

Text	[Length] Enter the max number of characters to enter, for example 10 (ten characters). Max 255 characters
Number	[Length] Enter the max number of characters, for example 10. Max 64 characters
Percent	[Length] Enter the max number of characters, for example 10
Currency	[Length] Enter the max number of characters, for example 10 (ten numbers)
Data	You have only to give a name to the field
Email	You have only to give a name to the field
Phone	You have only to give a name to the field
Picklist	You can create a drop-down menu (picklist) with values
Picklist Multi-language	Drop-down menu which values can be translated in different languages
URL	You have only to give a name to the field
Check Box	Define a check box (yes/no). You have only to give a name to the field
Text Area	You can enter up to 255 text characters
Multi-Select Combo Box	This field allows to select more values through the CTRL button

15.1.2 Custom fields mapping for Leads conversion

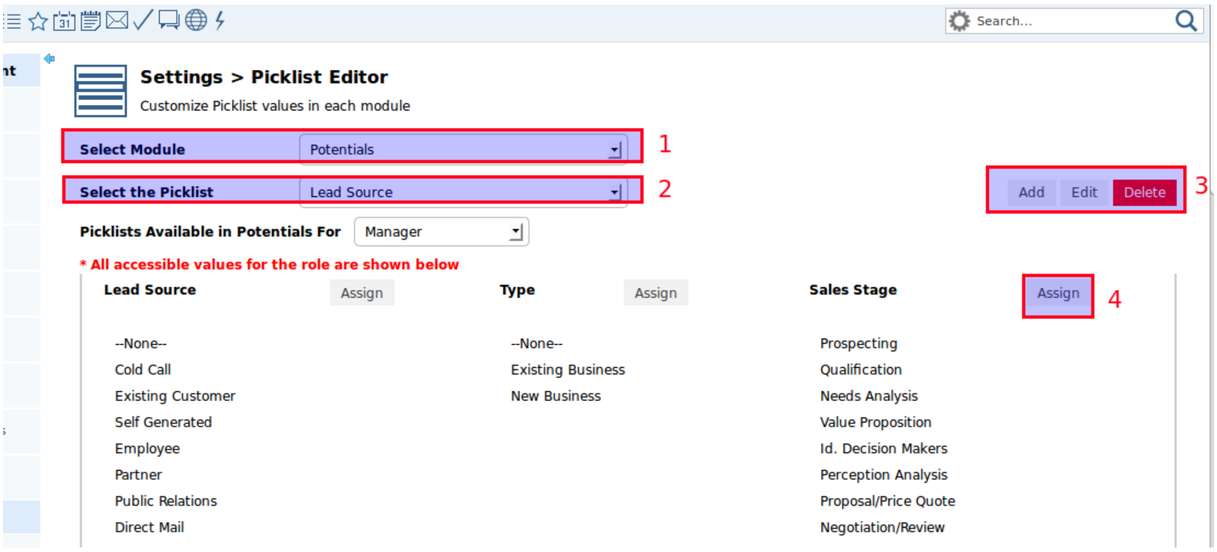
Only in the Leads module. Leads customized fields can be related with Accounts, Contacts and Potentials; during the lead conversion all the data are transferred into the new records.

1. Create the new custom field both in Leads (the source module) and in the destination module(s) where data will be transferred (Accounts, Contacts, Potentials). The field must have the same features: format, type (text, picklist, number...) and length.
2. *Module Manager > Leads > Leads CustomField Mapping*
   Choose the field in the destination module(s).

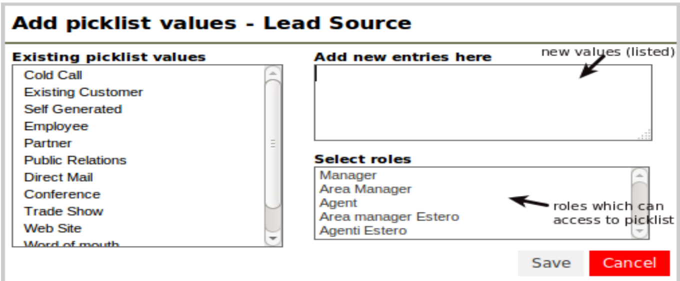
Add mapping: you can create a mapping for new fields, and you can map the fields how you prefer.
Before that, you have to create the field from the Layout Editor, both in the source and destination module(s).

15.2 Picklist Editor

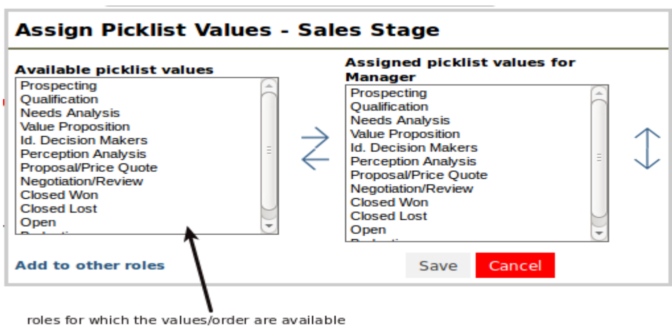
You can modify the Picklist content and assign different views per role.



1) Select the module;
2) Choose the picklist field
3) add/edit/delete values in the picklist



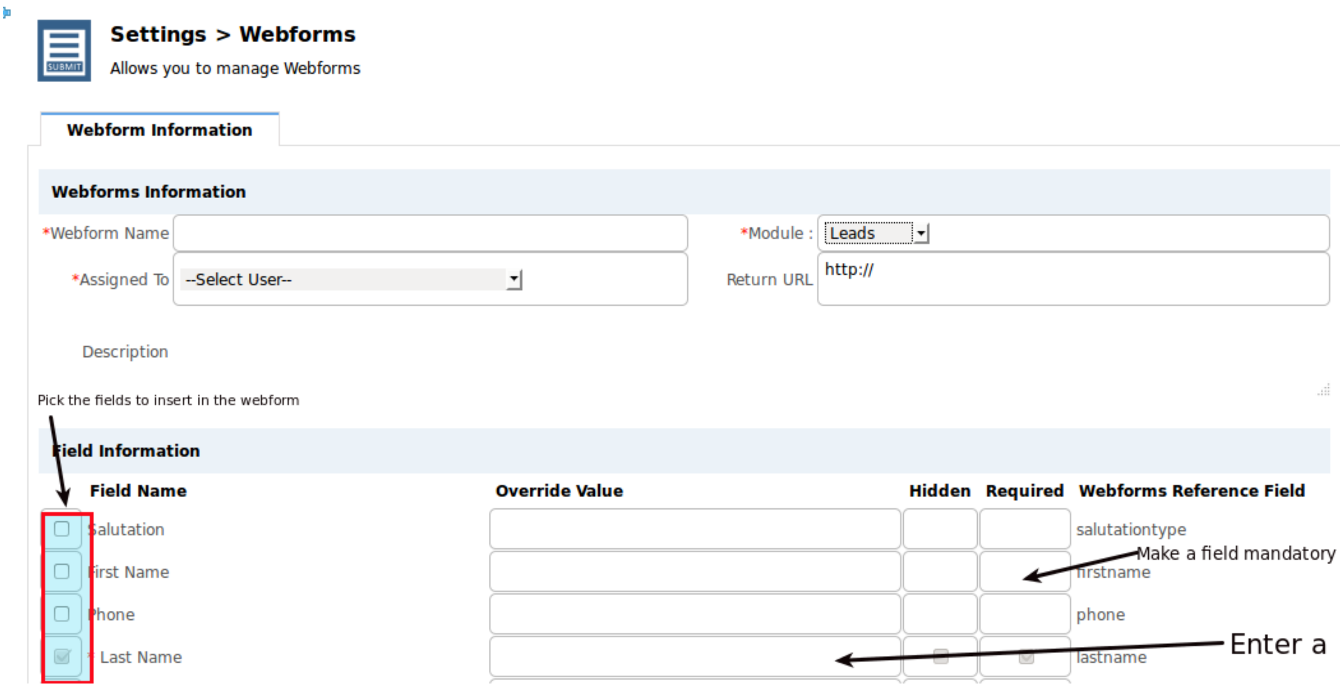
4) enable other roles to see picklist values or change their order



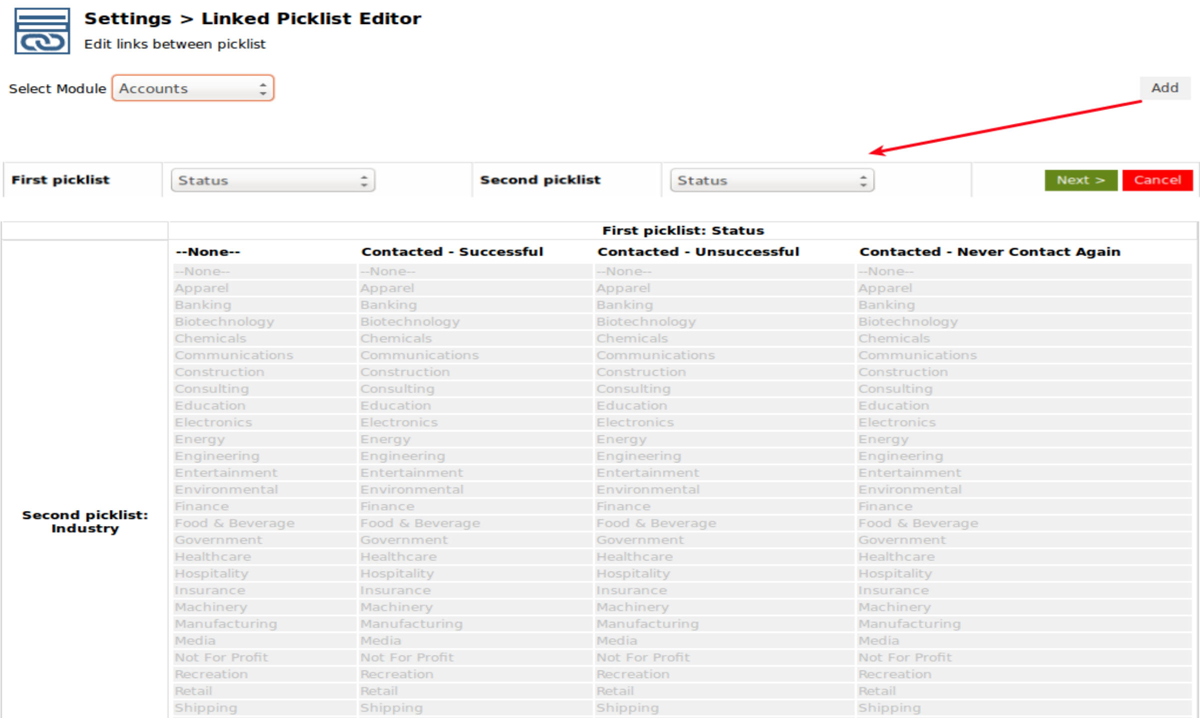
Note: Some picklists are set as default and are not editable.

15.3 Linked Picklist Editor

What does linked picklist mean? It means that the values of a first picklist have an influence on the values of a second picklist. A typical example is: when you select a district/province in picklist 1, the picklist 2 shows automatically the cities of that district.

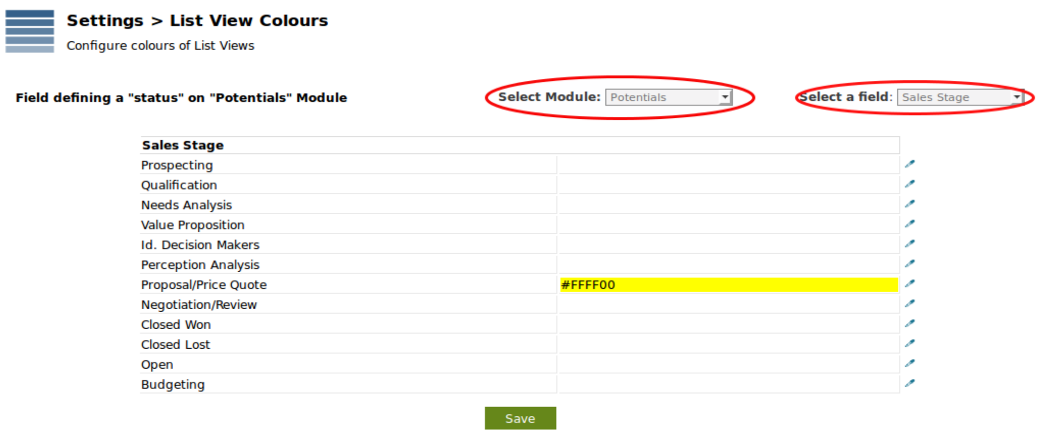


To create a new link between two picklists, go to: *Settings > Linked Picklist Editor*
Select the module, click *Add*, and select the picklists.



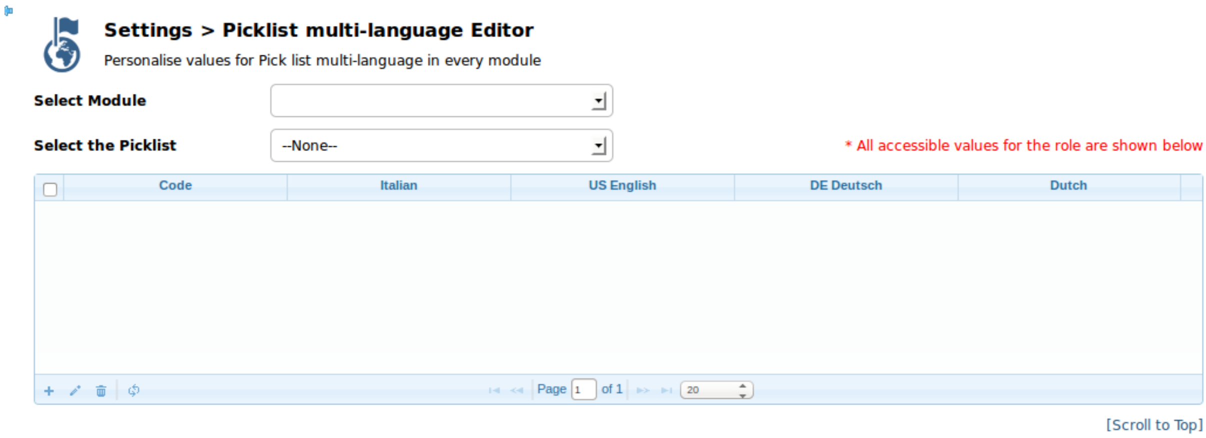
15.4 ListView Color

You can apply a ListView Color based on the value of a field (picklist/drop-down menu type).
Example: I want to see accounts colored according to their rating (green if acquired; red if failed; etc.)



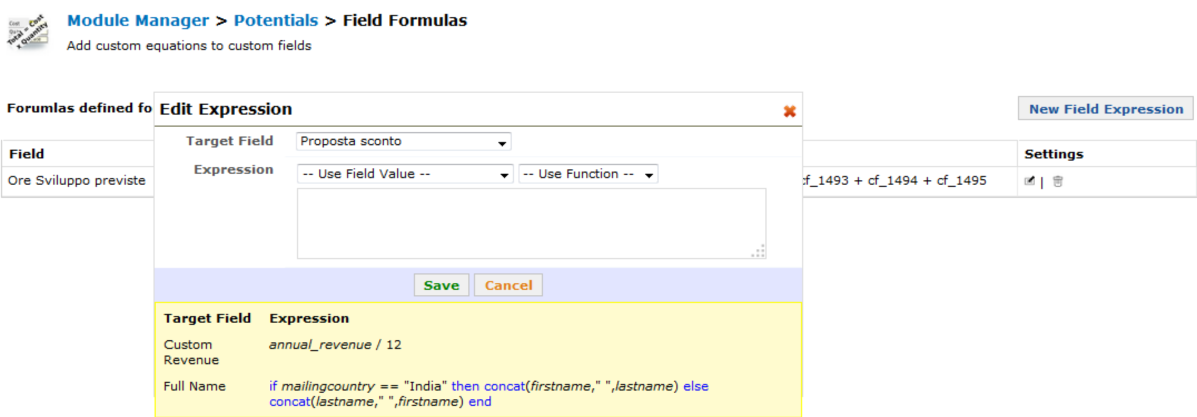
15.5 Picklist multi-language Editor

An user can access VTECRM in different languages and see the menus and the fields within the modules translated in that language. You can set up this function through the multi-language editor for picklists.
Once created the picklist fields from the Layout Editor, you have to enter the values in the multi-language editor.



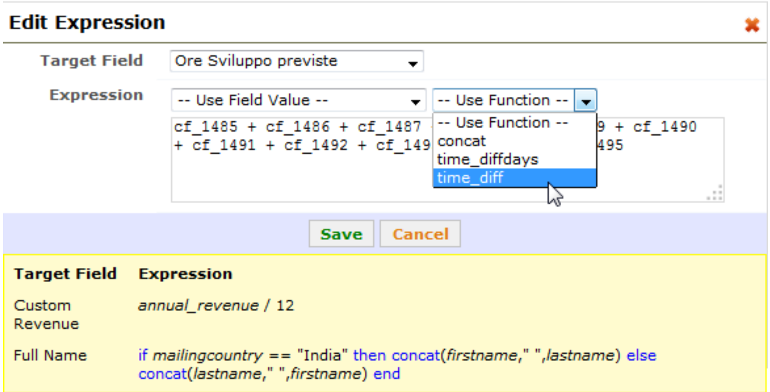
15.6 Formula fields

Formula fields are custom fields that can be configured as computations. You have to choose the module on which to apply it, and enter the formula.



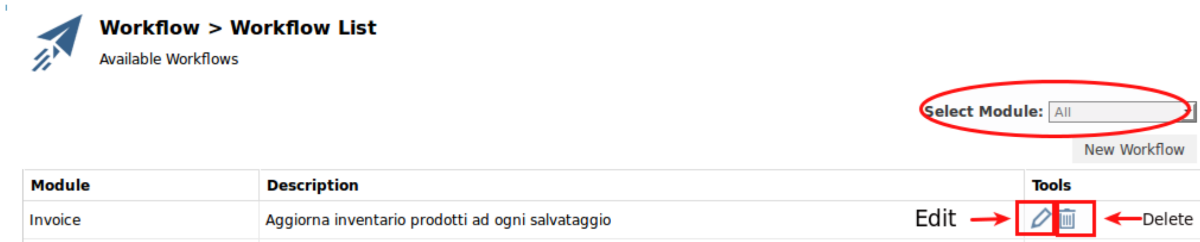
You can make computations also with date-type fields (time):

- *time_diffdays*: provides the difference in days between two dates
- *time_diff*: provides the difference in seconds between two dates

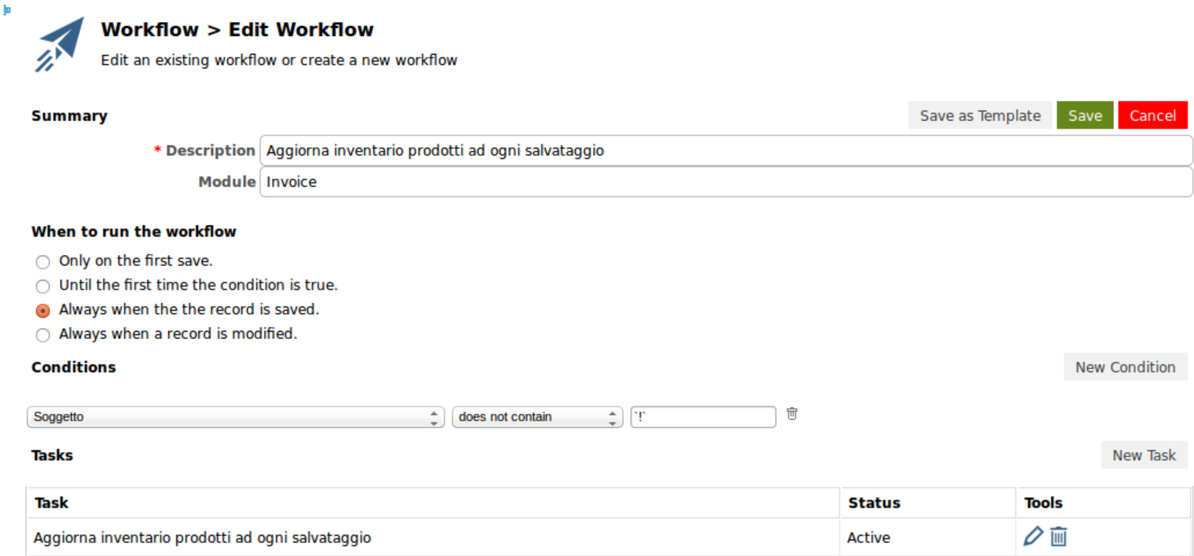


15.7 Workflows

Workflows allows you to manage the team working. This tool defines a series of rules for data sharing and information passage among users.
Only the administrator can configure the workflows, from *Settings > Workflows*.



Select the module for which you want to create the workflow, than you can configure the workflow.



1. Enter a name
2. Decide when to run the workflow
3. Define the condition(s)

When to run the Workflow:

- Only on the first save: the condition is verified only when you first save the record
- Until the first time the condition is true: the workflow starts the first time the conditions is true
- Every time the record is saved: the condition is verified each time you save the record (creation, edit)

- Every time the record is modified: the condition is verified each time you modify the record (edit)

Once saved, the button *New Task* appears.
Add the Task to do when all conditions are true. You can:

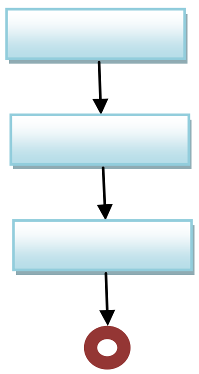
- create event or task (calendar activity)
- send email*
- update field

VTECRM offers some pre-configured workflow:

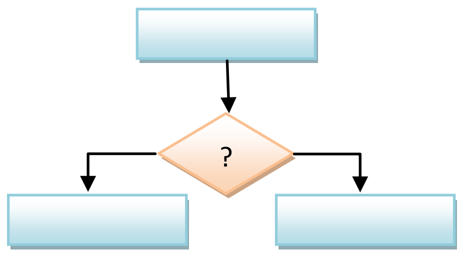
- Invoice module: every time you save, the system updates the inventory.
- Accounts and Contacts modules: when you create a new account/contact with "Notify Owner" enabled, the system sends an email to the “assigned to” user.
- Contacts module: when you create a new contact with "User Portal" enabled, the system send an email to the contact (with credentials).
- Potentials module: when you create a new potential, the system sends an email to the “assigned to” user.

15.8 Status Manager

Status Manager allows you to develop workflows, both linear or complex, defining them through the values of a Status field.



Linear flow



Complex flow

The flows are also defined by the roles involved. Each step is archived in a “history” that records times, stages and actors, showing the flow progress.
Example: the marketing campaigns are organized by the manager, and the agents carry them out.
The manager:

- creates new campaigns
- deletes campaigns that are not approved
- declares the end of campaigns

You can configure the Manager Status for only one field per module.
If you try to activate manually the Manager Status on another field, the system warns you that the manager is already active.
The system immediately asks you to select the role on which to apply the configuration. The rules will be applied on all the users related to the selected role.

1. Select the initial state
2. Fill the status transitions table

The table should be completed per line:

- the symbol ◀ ▶ represents the current status
- pick ☑ the allowed actions
- don’t pick ☐ the not allowed actions

You can quickly copy the new configuration of the Status Manager on another role.
After selecting module, field and role to configure, select the source role from which you want to copy the configuration, and click *Copy*.

User side

Let's see how to use VTECRM when the Status Manager is configured, from the user (not Admin) point of view.
Creation: When you create a new potential, within the record the field automatically takes the initial state. You can configure the Status Manager so that different roles have different initial states.
Edit: To change the field, you have to use the Status Manager panel on the right. Through that, you can switch to the another available state, according to the rules you set before. The panel also shows information about the last action taken: user, status set, date and time, etc.

15.9 Conditional fields

Through the Conditional fields you can define special permissions to access one or more fields within a specific module:
- hide fields
- make fields visible but not editable
- make fields visible and editable
- make fields mandatory *
- create combinations of the previous
These rules can be applied on the users that belong to a role, a branch of the hierarchy or a group.

* Note: This function is enabled only in case of combined use of Status Manager and Conditional Fields.

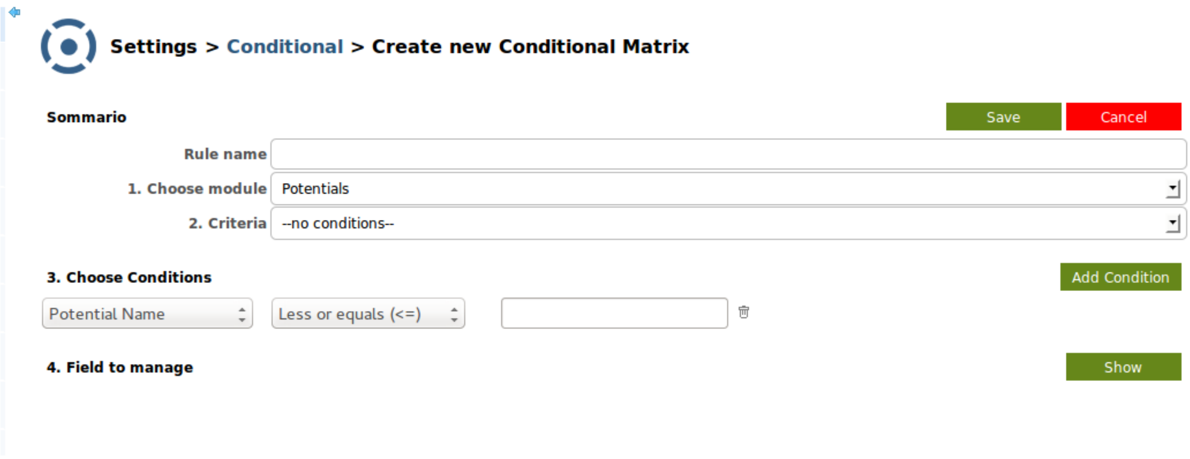
15.9.1 Use examples

a) Suppose that your company categorize 3 types of accounts: Customers, Partners and Competitors. You have to define more details for each type, creating fields like *Further Customer details, Further Partner details and Further Competitor details*. Through Conditional Fields you can set the following rules:
   - if *Type = Partner* then show the field *Further Partner details* (and hide fields *Further Customer details* and *Further Competitor details* so the users can't fill these fields)
   - in the same way, if *Type = Competitor* then show the field *Competitor details*
   - and finally if *Type = Customer* then show the field *Customer details*

b) Suppose that in the customer record there are two blocks, one to manage business information and one to manage technical information. You want to give to the agents the access to technical information, but without the permission to modify.
   Through Conditional Fields you can redefine the access permission to each field of "technical information" block, setting it as visible but not editable for a specific role/group.
   In the same way, business roles will be able to modify only commercial information.

15.9.2 Create a rule

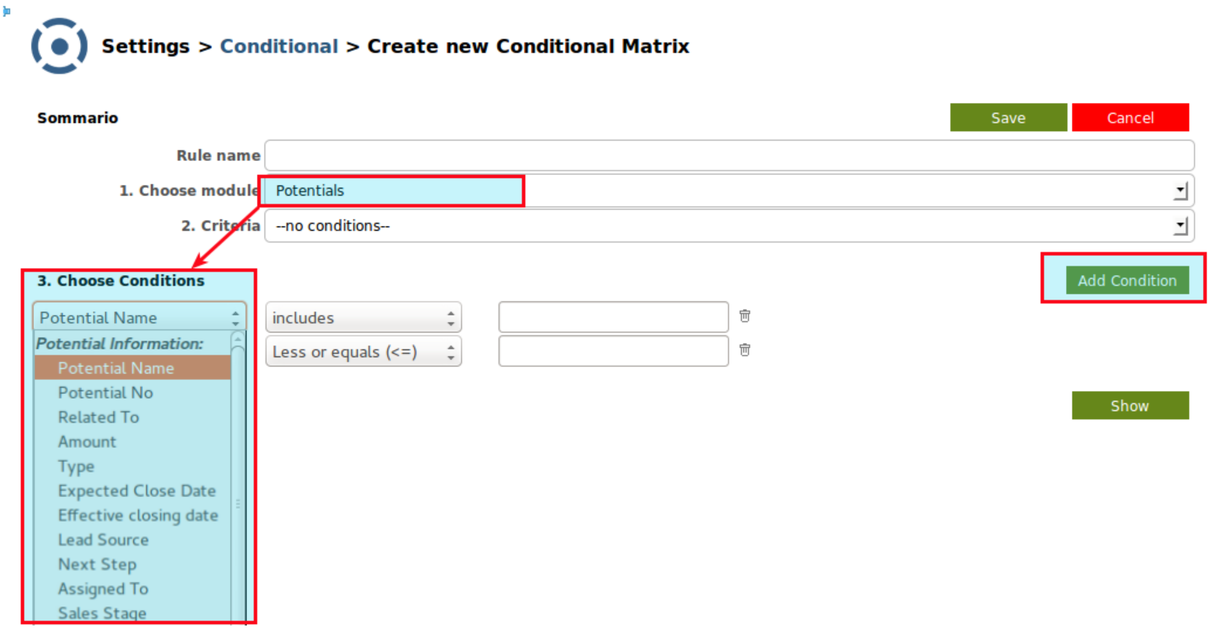
To create new rules you have to access to VTECRM as Administrator, and go to: *Settings > Conditional*



1. enter a name for the rule
2. select the module on which you want to apply the rule
3. select the role or group:
   - a specific role (ex: Role: CEO)
   - a branch of the hierarchy (ex: Role and subordinates: Sales Manager)
   - a group of users (ex: Group: Marketing Group)

Choose the condition(s) that must be verified in order to apply the rule on the block.

You can choose among conditions related to module selected before.
You can add more conditions through the button *Add Condition*.

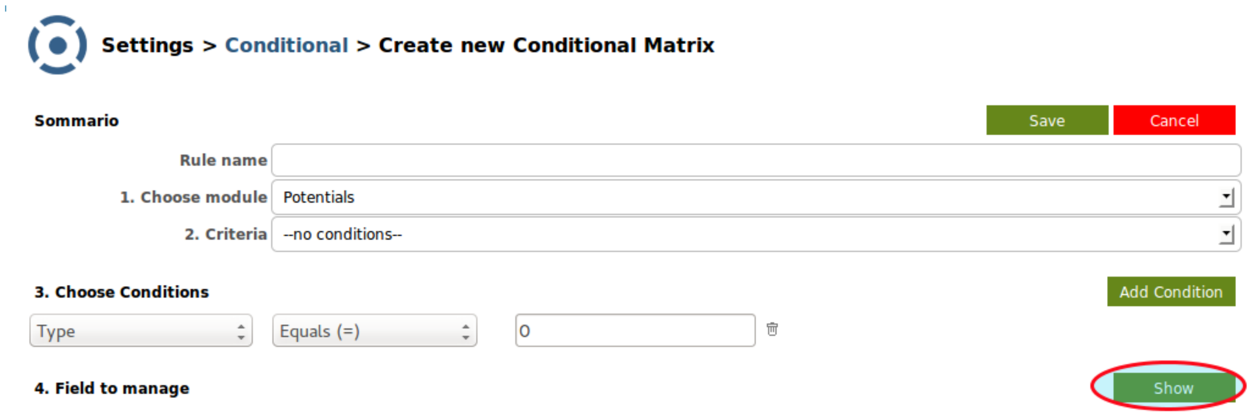


For the pick fields ☑ enter 0 for "no" and 1 for "yes".

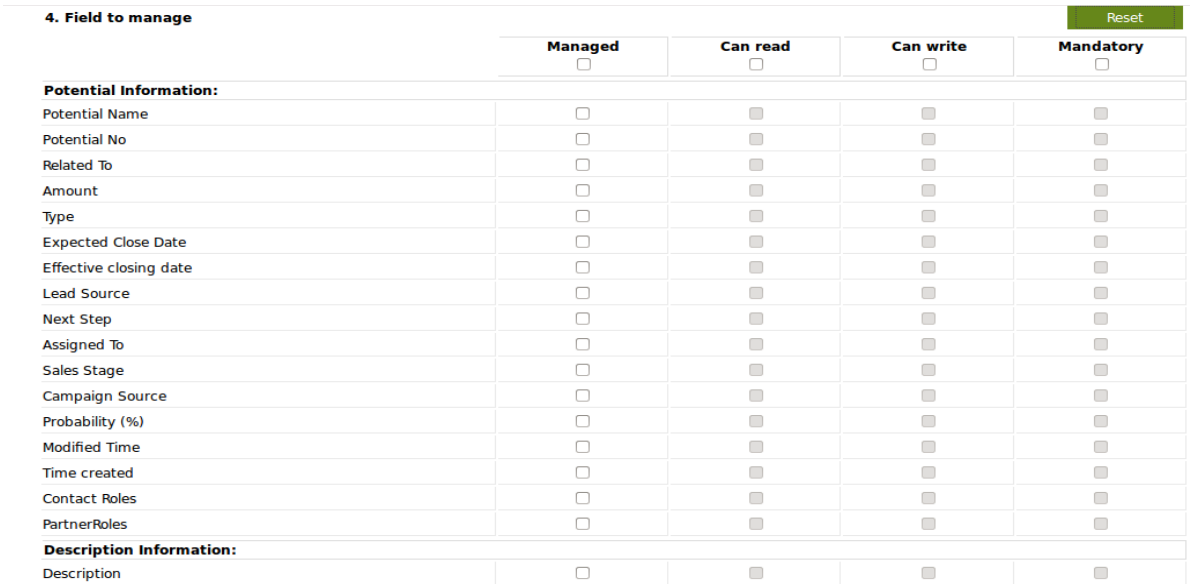
Note: Conditions are linked by the connector "and"; the rule is applied if all conditions are true.

15.9.3 Field to manage

To access the configuration of field permissions, click *Show*.



VTECRM shows all the fields of the module, and allows you to define the privileges for each one.



- Managed: when condition is true, special access permissions are applied (defined by the rule)
- Can read: reading permission
- Can write: writing (editing) permission
- Mandatory: to make the field mandatory (this function is enabled only in case of combined use of Status Manager and Conditional Fields)

Possible configurations:

a) No special access permissions: When condition is true: Conditional Fields do not manage the field; users can access the field according to normal permissions.
b) Hide a field: When condition is true: the field are hidden.
c) Make a field visible but not editable.
d) Make a field visible and editable.
e) Make a field mandatory.

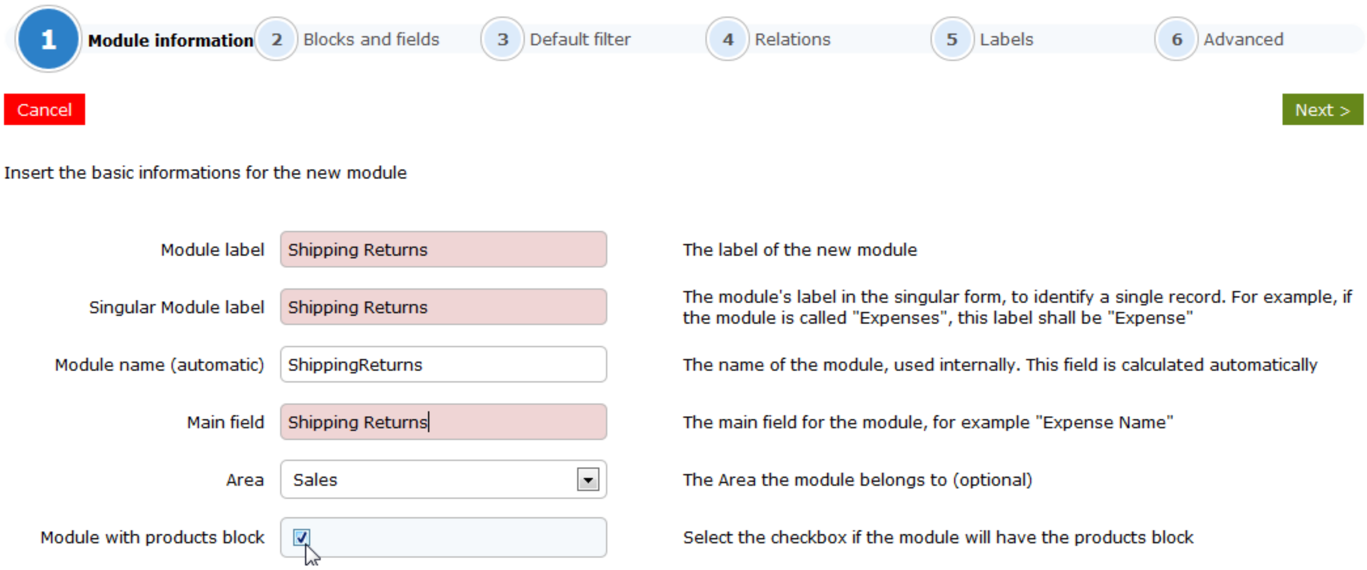
15.10 Module Maker

This innovative tool allows to create new modules in complete autonomy, integrated perfectly with the rest of the standard VTECRM. The customized modules can be basic-type (head-rows) or sales-type (with product blocks).
In the following example we will add the module Shipping Returns which includes products.

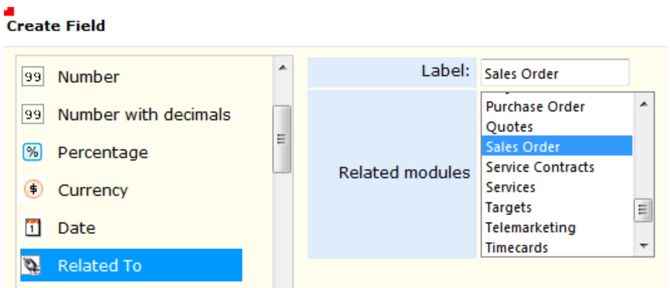
15.10.1 Create

Click *Add* to starting the wizard.

1. **Module information:** enter the main fields as explained.



2. **Blocks and fields**: the Layout Editor of your new module, in which you add customized fields of any type (text, number, picklist, date…) and the relation fields with other modules (relation N to 1). For example, if we need a relation between the Return and the Sales Order, we add this field:

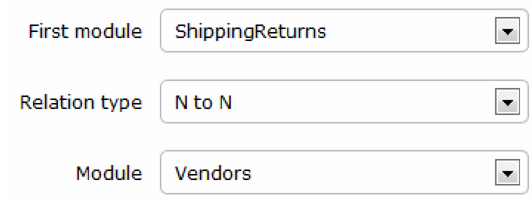


3. **Default filter**: the first part is like the Filters tool, you can select the columns to see in the default list view of the module. In the second part you can define how the related list will appear (what columns to see) from the other records. For example:

Showing 1 - 1 of 1 — 1 of 1

Action	No	Subject	Account Name	Order Name	Total	Assigned To
	S3	Cloud Prof	GrandiAffari	Cloud Professional	4.072,00	admin

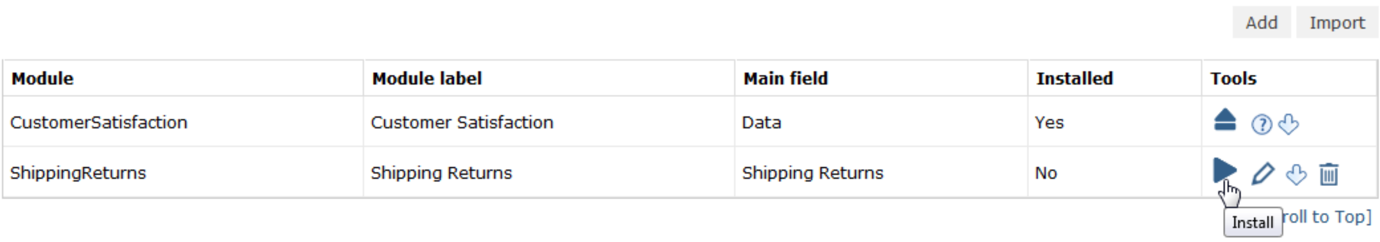
4. **Relations**: here you find the relations already set in step 3 (N to 1) but you can add N to N relations between modules. For example:



5. **Labels**: translate all the new labels in the available VTE languages.
6. **Advanced options**: decide if the new module is private or public (Shared Access), allows to import/export data, and more.

Once saved, the module must be activated.

15.10.2 Activate, disable, edit, import, export



Module	Module label	Main field	Installed	Tools
CustomerSatisfaction	Customer Satisfaction	Data	Yes	
ShippingReturns	Shipping Returns	Shipping Returns	No	

Click to activate the module.

The other icons represent other available tools: disable the module, delete the module (only if disabled, not if active), modify the module, export in XML format, read log-file. *Import* allows to load external XML.

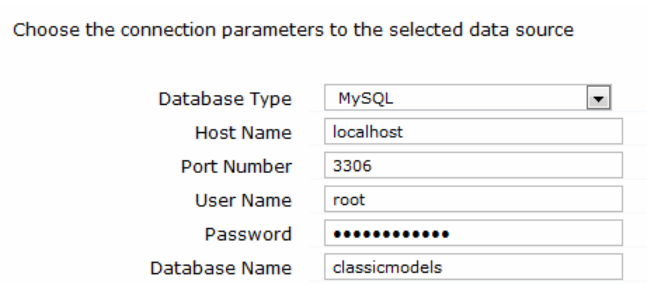
***Please note!** VTE Community does not allow to import/export modules.

15.11 Database Import

This innovative tool allows to import external data tables from database and from CSV file (for this, see Import/Export). The import process can be scheduled (frequency, data and hour) and advanced extraction queries are possible.

Click *Add* to starting the wizard.

1. **Module**: select the destination module.
2. **Data source**: select database or CSV.
3. **Source parameters**: enter the information requested.



4. **Source table**: select the table you want to import. Below, if necessary you can enter a query for advanced extraction. ***Please note!** VTE Community does not allow queries.

5. **Field mapping**: here you are asked to map the database fields with VTECRM fields, paying attention to mandatory fields. Some fields allow to choose the format or add some simple formulas (for example: “prepend”). You must also select one key field.

Column	Row 1	Value format	Formula	CRM Fields	Key Field	Default Value
customernumber	103		--None--	Account No	☑	
customername	Atelier graphique		--None--	Account Name (*)	☐	
contactlastname	Schmitt			--None--	☐	
contactfirstname	Carine			--None--	☐	
phone	40.32.2555	Phone Validator		Phone	☐	
addressline1	54, rue Royale		--None--	Billing Address	☐	
addressline2				--None--	☐	
city	Nantes		--None--	Billing City	☐	

6. **Schedule import**: select when the import will be executed.

7. **Notification**: select which user will receive the import notifications.

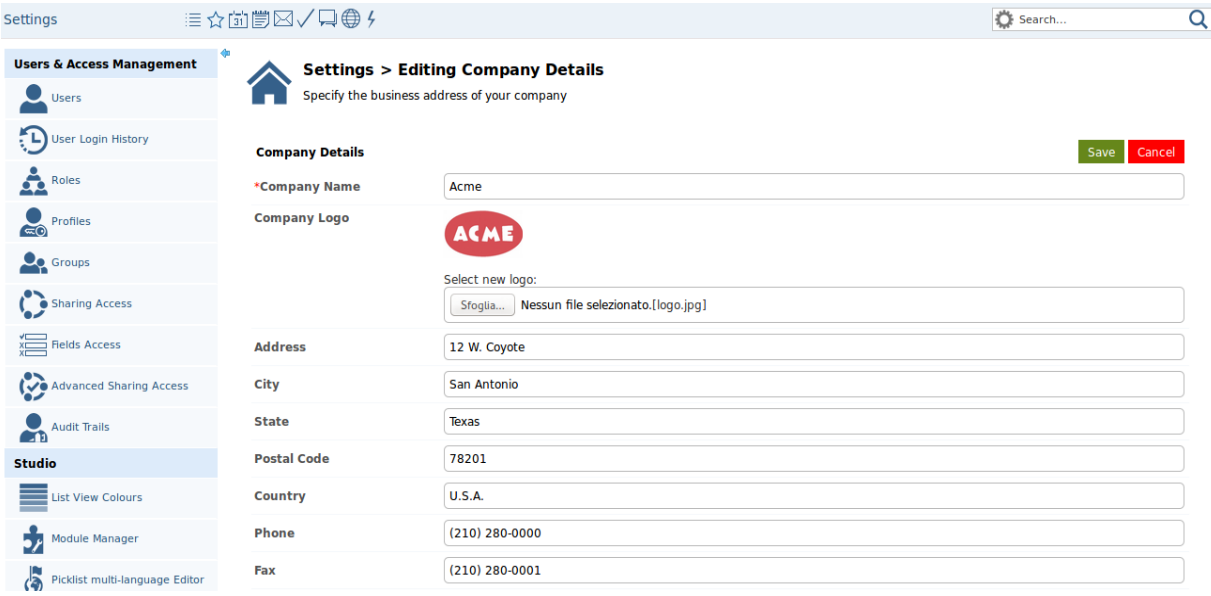
The general panel shows all the configured processes (enabled or disabled), a *Play* icon to execute now the import process, the log-file and the usual edit/delete icons.

Module	Source	Last import	Next import	In Progress	Enabled	Tools
Accounts	database	-	2015-08-15 12:00	No	☑	

16. Other settings

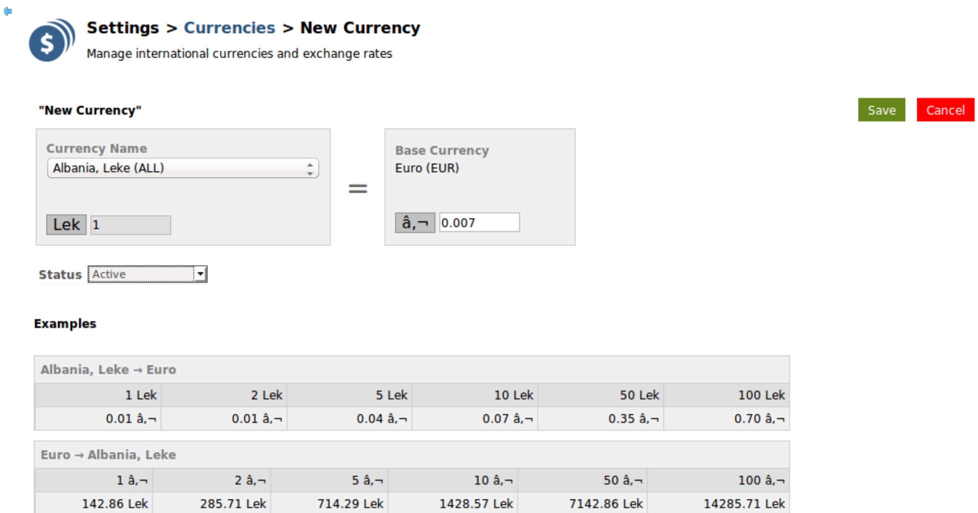
16.1 Company details

From Company Details you can set up the header of invoices, quotes, orders that you export/send as PDF files, with the information about your company (name, logo, address, etc).



Note: Be sure that the size of the logo fits into the space available in the PDF. The logo must be PNG or JPG. We recommend the size 150x60 px.

16.2 Currencies



Currency information:

Currency Name	Currency name, for example "Albania, Leke (Lek)".
Currency Code	The short Currency Code, for example “ALL”
Symbol of the Currency	Enter the Currency symbol, for example “Lek”

Conversion Rate	The conversion rate have to be connected to the base currency of VTE
Status	Active or Inactive

16.3 Taxes

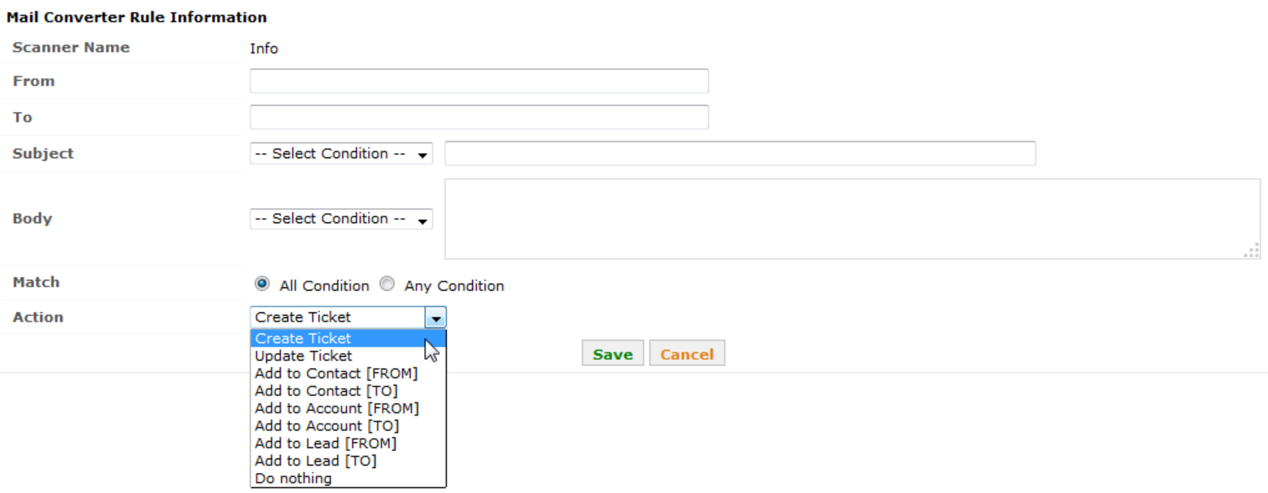
To configure the taxes to apply on invoices, quotes, etc. You can set them individually for products/services, or as groups.

16.4 Proxy Server

Configure the Proxy Server if used by your company to access Internet.

16.5 Mail Converter

With VTECRM is possible to configure the mailbox (or multiple mailboxes) for scanning. Remember to change the status from Disabled to Enabled, so it can work out.
With the button *Select Folder* you can include or exclude a mail folder.
The address is verified by analyzing the email subject or the message. If the email satisfies the rules, the actions taken are defined by the Setup Rules, as in the figure below.



16.6 Webforms

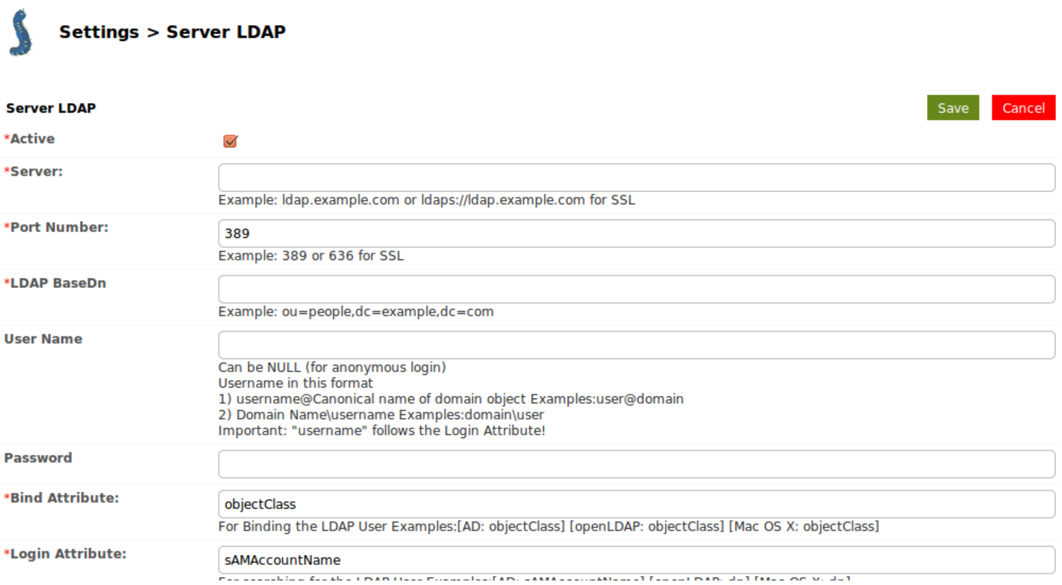
Through VTECRM Webform you can create a webform interface to insert on your website. The data entered in the webform are directly added in VTE, specifically in the Leads module (Leads is the only module related to webforms).
Go to *Settings > Webform* and click the button +.
Fields details:

- assigned to: VTECRM user that will manage the lead
- return URL: the page to which redirect once confirmed the webform

The *Show Form* button shows you the html code to copy and paste in your webpage.

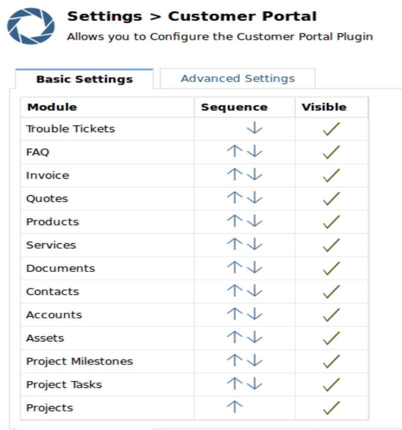
16.7 LDAP

You can configure the server LDAP data to synchronize the user passwords: *Settings > Server LDAP*
Enter the server LDAP information, as you see in the image.



Then, when you create a new user you can connect it to the LDAP.

16.8 Customer Portal



Select which modules your customers can access from the Customer Portal, and their order.

In the Advanced Settings, define the visibility privileges (if the customer sees the data of both his Contact and his Account or only his Contact's), the management profile and the email template for credentials.

16.9 Integration with Asterisk

VTECRM can be integrated with Asterisk, an open source PBX phone application, to transfer phone calls. Asterisk is a free implementation of PBX software that allows you to get the same features offered by other systems with a lower cost and greater flexibility. Asterisk is today a benchmark in the business world. Its completeness and reliability make it the ideal platform for a wide range of applications: PBX with both traditional phone lines and IP channels, Centrex systems (PBX "Virtual" and centralized), applications to manage Call Centers and much more.

Integration features:

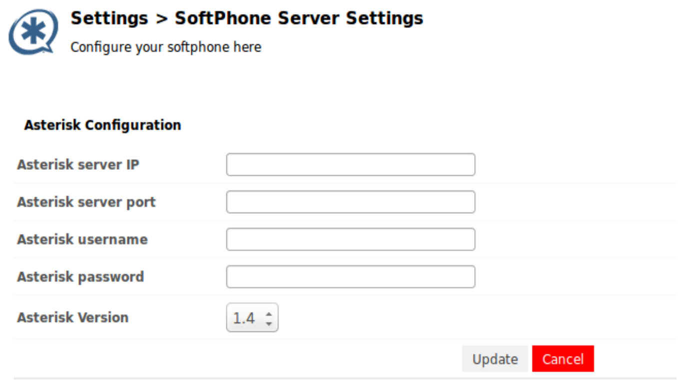
1. Make phone calls by clicking on phone numbers directly from VTE.
2. Receive notifications for incoming calls with details of the caller (notifications appear on right down of the screen).
3. See the calls history in the PBX Manager Module (*Settings > PBX Manager*).
4. Relate calls to Contacts/Accounts/Leads in the activity history.
5. Set user extensions through My Preferences.

Requirements:

- VTECRM installed on your system.
- Asterisk installed on your system.
- Asterisk server and VTECRM server must be able to see each other.

- A valid user extension for Asterisk and a Voip phone configured with that extension.

When the Asterisk server is configured towards VTE, you have to set VTECRM in order to have the connection with Asterisk.
Settings > SoftPhone Server Settings.



Configure Asterisk extensions for an user allows you to make and receive calls from that user. Set it through Preferences; remember to pick Receive Incoming Calls.

To make a call, click on the phone number directly from VTECRM.

All the calls are automatically recorded by VTECRM as events (*type = Call*, *status = Held*) related to the record from which you launched the call.

Example: from the Leads module, click on Noemi D. phone number and start a call. At the end, open Noemi D. record and you find the call details in the Activity History field.

To recognize incoming calls you must have a CRON configuration in VTECRM server (see the chapter CRONJOB).
If the source number is not recorded in VTE, instead of the contact details appears Unknown Caller. VTECRM immediately propose you to create a lead, a contact or an account.

Note: You can save numbers in any format, with or without codes and also with SIP, PSTN using " : " to separate letters from numbers. It is recommended to not use special characters or dashes.

17. CRONJOBS

For the correct operation of some VTECRM functions (mainly email sending and internal reminders) you need to active the cronjobs on the server (scheduled activities).

To activate the automatic functions, insert the following file in the cron:

Linux
<directoryVTECRM>/cron/RunCron.sh

Windows
<directoryVTECRM>/cron/RunCron.bat

After that, the following functions will be active:

- Workflow (email sending)
- Import from CSV file
- Calendar alerts
- Notifications and summary (via email)
- Messagges module (automatic download)
- Newsletter
- Recurring invoices

The following function needs to be activated manually by setting the column *active = 1* in the table of the *vte_cronjob* database.

- Mail Converter (mail-to-ticket)
- SLA on Tickets

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