How to Use General CRM

Salesforce Automation

Sales Automation streamlines and enhances the operations of your sales team. J Morgan CRM helps your sales team manage Leads, Opportunities, Quotes, Invoices, and provides unified view of all data related to Contacts and Organizations. In addition, users can view monthly and quarterly sales pipeline and create custom reports by region, sales person, ...etc.

The following modules are key to the Sales process

Leads Module

A lead is a prospect who might or might not be interested in your product/service. You may collect leads from your marketing events such as conference, advertisement, trade show etc. The goal of a salesperson is to convert a lead into a customer.

Creating Leads

Different ways to create Leads

click on + button, fill up the fields and click ***Save***.(OR)

Click on import icon to import from .csv file.(OR)

Click on the *Quick Create* dropdown and select *New Lead*.

Importing Leads

You can import leads from external sources such as trade shows, seminars, advertisements, purchase leads, and other marketing campaigns.

Few simple steps to import your customer data in **J Morgan CRM**(example:*Leads*)

- Click on import button on toolbar to start importing *Leads*.
- Choose the pre-formatted CSV file. Click ***Next***.
- Configure the CSV header vs CRM field mapping. Click ***Import***.

You can re-use the mapping saved earlier.

- Bulk import starts.

The page reloads several times until all the CSV rows are parsed.

- Result of import is displayed.
- Click ***Finish*** to end import, ***Import More*** to import more, ***Undo Last Import*** to cancel the import, and ***Last Imported Records*** to view records that were imported successfully.

Filtering Leads

On successful creation, Leads are displayed as the Listview in Leads Home Page.Filter provides the ability to pre-configure the search condition based on field value to short-list the records. It enables you to view the list of records in a desired format.Select an item from the Filters drop-down to view the records in that order. The default option is set to 'All' where all the records are displayed.You can create, edit or delete custom filters.

Searching Leads

Although the Listview filters the records based on pre-configured field values, you might need to further lookup.You can perform three types of Search:Basic Search, Advanced Search, Alphabetic Search, to sort-out your records in no time.

Exporting Leads

J Morgan CRM allows you to export Leads to spreadsheet files such as Microsoft Excel, Open Office, and others for further data analysis.

Steps to export your records to Spread sheet files in **J Morgan CRM**

- Choose a module on which the export has to be performed.
- Click export icon on toolbar to start exporting.
- Select the desired options.
- Click Export Leads to export your leads to spreadsheet.

Creating Duplicates

While creating a lead, if most of the details of new record matches with an existing record, you can duplicate the existing record with minor edits.

- Choose the record you want to duplicate.
- Click on the lead's name to go to the detail view.
- Click Duplicate button.
- In Duplicating leads screen, update the fields if required.
- Click Save to update the changes.

Editing Leads

Edit function allows you to update all field values of a record. Mass Edit feature is also available to simultaneously update the same fields of multiple records.

Deleting Leads

You can delete unwanted Leads either from Listview or Detailview.

Follow up your Leads

You can follow up the lead by sending Emails, SMS, setting up Meeting/Call or create To Dos to track and complete your task.

All the interactions and communications done with the lead will be logged under **Activities** section of the respective lead. Whereas closed activities are archived under *Activity History* section.

Please refer to the Calendar module for more details on creating tasks and activities.

Completed activities will be automatically moved to *Activity History* once the activity status is changed to 'Closed'.

Mapping Fields

J Morgan CRM allows you to map Standard fields and Custom fields before converting a lead to Contact and Organization or an Opportunity. The field values will be transmitted to the selected target fields. This will ensure that the data will not be lost.Standard fields will be automatically mapped but the custom fields should be mapped manually.

Steps to map fields in J Morgan CRM

1. Click on the Settings Icon present below the menu bar.
2. You will be re-directed to Module Settings page.Click on *Leads Field Mapping*.
3. In the Fields mapping page, the standard fields are automatically mapped.Click Edit button to make changes manually.
4. To map Custom Fields, Click on Add Mapping button, Select Source Custom field from the picklist, and map the target field values accordingly.
5. Click Save to update your changes.

Mapping Custom Fields

Lead Conversion

Once a Lead is qualified and determined to be a potential sale, the Lead is converted to a customer *Organization*, *Contact* and an *Opportunity*.

When you convert a lead, J Morgan CRM creates a new Organization, contact and, optionally, a Opportunity using the information from the lead. All e-mail communications, attachments, open and closed activities from the lead are attached to the Organization, contact and Opportunity.

To convert a lead:

- Click *Convert Lead* link on the Detailview.
- Edit the basic details (Organization Name ...)
- If there is a chance of immediate sale, de-select *Opportunity* checkbox.
- Provide the necessary information.
- Click ***Save***

1. Lead information will be transferred to *Contact* & linked to *Organization*.
2. You will no longer see the converted Lead on listing in Leads home page
3. Administrator should configure the mapping for custom field transfer across other module.

Leads Module Administration

- Click icon on the toolbar.

Duplicate Record Handling

Duplicate record detection gives you the capability to detect and handle duplicate record. The merge feature helps you manage system storage consumption and maintain data quality by freeing the system from old, obsolete, or invalid data. Detection rules can be defined for different record types, including custom entities etc.

Associate Leads with other records

Click on the *More Information* tab in the detail view to view the related modules associated with Opportunities.

Modules associated with Opportunity's record are listed below.

Activities

Email

Activity History

Documents

Products

Campaigns

Services

Opportunities Module

opportunities provide the strategy to follow up prospective customers who are likely to successfully finish the sale.It helps you track the Potential of prospects through the sales cycle.

Creating *Opportunities*

Different ways to create ''Opportunities''

click on + button, fill up the fields and click ***Save***.(OR)

Click on import icon to import from .csv file.(OR)

Click on the *Convert Lead* link.(OR)

Click on the *Quick Create* dropdown and select *New Opportunity*.

Importing *Opportunities*

You can migrate your Opportunities from other sales force automation applications. Before migrating the data, you must convert the data in to CSV format.

Few simple steps to import your customer data in **J Morgan CRM**

- Click import on toolbar to start importing *Opportunities*.
- Choose the pre-formatted CSV file. Click ***Next***.
- Configure the CSV header vs CRM field mapping. Click ***Import***.

You can re-use the mapping saved earlier.

- Bulk import starts.

The page reloads several times until all the CSV rows are parsed.

- Result of import is displayed.
- Click ***Finish*** to end import, ***Import More*** to import more, ***Undo Last Import*** to cancel the import, and ***Last Imported Records*** to view records that were imported successfully.

Filtering Opportunities

On successful creation, Opportunities are displayed in Listview on Opportunities Home Page.Filter provides the ability to pre-configure the search condition based on field value to short-list the records. It enables you to view the list of records in a desired format.Select an item from the Filters drop-down to view the records in that order. The default option is set to 'All' where all the records are displayed.You can create, edit or delete custom filters.

Searching Opportunities

Although the Listview filters the records based on pre-configured field values, you might need to further lookup.You can perform three types of Search:Basic Search, Advanced Search, Alphabetic Search, to sort-out your records in no time.

Exporting Opportunties

J Morgan CRM allows you to export Opportunities to spreadsheet files such as Microsoft Excel, Open Office, and others for further data analysis.

Steps to export your records to Spread sheet files in **J Morgan CRM**

- Choose a module on which the export has to be performed.
- Click export icon on toolbar to start exporting.
- Select the desired options.
- Click Export Opportunities to export your Opportunities to spreadsheet.

Sales Pipeline Chart

You can be able to view graphical representation of sales in pipeline.You can find this in *Dashboard* module.

Creating Duplicates

While creating an Opportunity, if most of the details of new record matches with an existing record, you can duplicate the existing record with minor edits.

- Choose an Opportunity you want to duplicate.
- Click on the Opportunity's name to go to the detail view.
- Click Duplicate button.
- In Duplicating Opportunity screen, update the fields if required.
- Click Save to update the changes.

Editing Opportunities

Edit function allows you to update all field values of a record. Mass Edit feature is also available to simultaneously update the same fields of multiple records.

Deleting Opportunities

You can delete unwanted Opportuntiy either from Listview or Detailview.

Creating *Invoice*

You can be able to create an invoice directly from *Opportunities* module.

1. Choose the Opportunity on which the Invoice should be generated.

2. Click on the Opportuntiy to go to the detail view.

3. Click on *Create Invoice* link , fill up the fields in Invoice, and click Save.

Associate Opportunities with other records

Click on the *More Information* tab in the detail view to view the related modules associated with Opportunities.

Modules associated with Opportunity's record are listed below.

Activities

Contacts

Products

Sales Stage History

Activity History

Documents

Quotes

Services

Contacts Module

Contact record captures information about a person. The person could be linked to an Organization or acting in individual capacity.

Contact record could be created directly, or when a lead is converted.

Creating Contacts

Different ways to create Contacts

click on + button, fill up the fields and click ***Save***.(OR)

Click on import icon to import from .csv file.(OR)

Click on the *Convert Lead* link.(OR)

Click on the *Quick Create* dropdown and select *New Contact*.

Importing Contacts

You can migrate your Contacts from other sales force automation applications. Before migrating the data, you must convert the data in to CSV format.

Few simple steps to import your contacts into **J Morgan CRM**.

- Click importon toolbar to start importing *Contacts*.
- Choose the pre-formatted CSV file. Click ***Next***.
- Configure the CSV header vs CRM field mapping. Click ***Import***.

You can re-use the mapping saved earlier.

- Bulk import starts.

The page reloads several times until all the CSV rows are parsed.

- Result of import is displayed.
- Click ***Finish*** to end import, ***Import More*** to import more, ***Undo Last Import*** to cancel the import, and ***Last Imported Records*** to view records that were imported successfully.

Filtering Contacts

On successful creation, Contacts are displayed in Listview on Contacts Home Page.Filter provides the ability to pre-configure the search condition based on field value to short-list the records. It enables you to view the list of records in a desired format.Select an item from the Filters drop-down to view the records in that order. The default option is set to 'All' where all the records are displayed.You can create, edit or delete custom filters.

Searching Contacts

Although the Listview filters the records based on pre-configured field values, you might need to further lookup.You can perform three types of Search:Basic Search, Advanced Search, Alphabetic Search, to sort-out your records in no time.

Exporting Contacts

J Morgan CRM allows you to export Contacts to spreadsheet files such as Microsoft Excel, Open Office, and others for further data analysis.

Steps to export your records to Spread sheet files in **J Morgan CRM**

- Choose a module on which the export has to be performed.
- Click export icon on toolbar to start exporting.
- Select the desired options.
- Click Export Contacts to export your Contacts to spreadsheet.

Creating Duplicates

While creating an Contacts, if most of the details of new record matches with an existing record, you can duplicate the existing record with minor edits.

- Choose the record you want to duplicate.
- Click on the Contact's name to go to the detail view.
- Click Duplicate button.
- In Duplicating Contact's screen, update the fields if required.
- Click Save to update the changes.

Editing Contacts

Edit function allows you to update all field values of a record. Mass Edit feature is also available to simultaneously update the same fields of multiple records.

Deleting Contacts

You can delete unwanted Contacts either from Listview or Detailview.

Use Cases

1.Filter that displays today's birthdays

Associate Contacts with other records

You can associate following records with Contacts, by clicking on *More information* tab.

1.Opportunities

2.Activities

3.Email

4.Tickets

5.Quotes

6.Purchase Order

7.Sales Order

8.Products

9.Activity History

10.Documents

11.Campaigns

12.Invoice

13.Service Contracts

14.Services

15.Projects

Organizations Module

Organizations is a customer account record for a customer or prospective customer. When a Lead is converted to a *Opportunity*, an *Organization* for the prospective customer is automatically created in the CRM system.

Creating *Organizations*

Different ways to create ''Organizations''

click on + button, fill up the fields and click ***Save***.(OR)

Click on import icon to import from .csv file.(OR)

Click on the *Convert Lead* link.(OR)

Click on the *Quick Create* dropdown and select *New Organization*.

Importing Organizations

You can migrate your Opportunities from other sales force automation applications. Before migrating the data, you must convert the data in to CSV format.

Few simple steps to import your customer data in **J Morgan CRM**

- Click import on toolbar to start importing *Organizations*.
- Choose the pre-formatted CSV file. Click ***Next***.
- Configure the CSV header vs CRM field mapping. Click ***Import***.

You can re-use the mapping saved earlier.

- Bulk import starts.

The page reloads several times until all the CSV rows are parsed.

- Result of import is displayed.
- Click ***Finish*** to end import, ***Import More*** to import more, ***Undo Last Import*** to cancel the import, and ***Last Imported Records*** to view records that were imported successfully.

Filtering Organizations

On successful creation, Organizations are displayed in Listview on Organizations Home Page.Filter provides the ability to pre-configure the search condition based on field value to short-list the records. It enables you to view the list of records in a desired format.Select an item from the Filters drop-down to view the records in that order. The default option is set to 'All' where all the records are displayed.You can create, edit or delete custom filters.

Searching Organizations

Although the Listview filters the records based on pre-configured field values, you might need to further lookup.You can perform three types of Search:Basic Search, Advanced Search, Alphabetic Search, to sort-out your records in no time.

Exporting Organizations

J Morgan CRM allows you to export Organizations to spreadsheet files such as Microsoft Excel, Open Office, and others for further data analysis.

Steps to export your records to Spread sheet files in **J Morgan CRM**

- Choose a module on which the export has to be performed.
- Click export icon on toolbar to start exporting.
- Select the desired options.
- Click Export Organizations to export your Organizations to spreadsheet.

Creating Duplicates

While creating an Organization, if most of the details of new record matches with an existing record, you can duplicate the existing record with minor edits.

- Choose the record you want to duplicate.
- Click on the Organization's name to go to the detail view.
- Click Duplicate button.
- In Duplicating Organization's screen, update the fields if required.

- Click Save to update the changes.

Editing Organizations

Edit function allows you to update all field values of a record. Mass Edit feature is also available to simultaneously update the same fields of multiple records.

Deleting Organizations

You can delete unwanted Organizations either from Listview or Detailview.

Organization Hierarchy

If you are handling various business operations at distinct locations, you can manage them by associating them all together, creating a hierarchy.

Steps to create a Organization Hierarchy in **J Morgan CRM.**

1. In the create view or edit view of Organizations module, you will find the *Member Of* field. Select the parent Organization from the list of existing Organizations.
2. You will find the categorization by clicking on the link *Show Organization Hierarchy* on the right side of detail view of a record.

Associate Organizations with other records

You can also associate Organizations with other records by clicking on *More information* tab in detail view of the record.

You can be able to associate following records with *Organizations*.

1.Contacts

2.Opportunities

3.Quotes

4.Sales Order

5.Invoice

6.Activities

7.Email

8.Activity History

9.Documents

10.Tickets

11.Products

12.Service Contracts

13.Services

14.Assets

15.Campaigns

16.Projects

Quotes Module

A Quote is a formal statement issued by seller to the prospective buyer, basically on a request for a quotation.It contains the detailed list of Products and Services, Prices and Taxes, Dates, Parties involved, Address information, Terms and Discounts.

Creating Quote

You can create a Quote manually in two different ways.

1. Click on the icon in the listview, fill up the fields and click Save button.
2. Click on *Quick Create* dropdown and select *Create Quote*, fill up the mandatory fields and click Save button.

Filtering *Quotes*

On successful creation, Quotes are displayed as the Listview in Quote Home Page.Filter provides the ability to pre-configure the search condition based on field value to short-list the records. It enables you to view the list of records in a desired format.Select an item from the Filters drop-down to view the records in that order. The default option is set to 'All' where all the records are displayed.You can create, edit or delete custom filters.

Create Custom Filter

Click *Create Filter* link next to Filters field.

Fill in the mandatory details in 'Details' section.

Select columns which has to appear in the list view.

Provide inputs on how to filter the records in 'Standard Filters' tab.

You can also define your own rules to filter the records in 'Advanced Filters' tab.

Click Save to view the filtered records.

Edit Custom Filter

Select a custom filter from Filters drop-down list.

Click *Edit* link next to Filters field.

Update the field values.

Click Save to update your changes.

Delete Custom Filter

Select a custom filter from Filters drop-down list.

Click *Delete* link next to Filters field.

Click OK on the pop-up to delete the filter.

Searching ***Quotes***

Although the Listview filters the records based on pre-configured field values, you might need to further lookup.

Basic Search

You will be able to perform a quick value lookup in one of field enabled on the current filter through Basic Search.

Choose a filter on which the record has to be searched.

Enter the search criteria against the fields.

Click on Search Now to see the results.

Advanced Search

Switch to this mode, if you prefer to search across multiple fields of records among those filtered in the Listview.

Click *Go to Advanced Search* in Search toolbar to filter records with more details.

Enter the search criteria against the fields.

Click New Condition to add rows to enhance your search.

Once you are done with providing input, Click on Search Now to see the results.

Alphabetic Search

Allows you to search records alphabetically.

Click on the alphabet with which the last name of the record begins.

In all the search methods, search results and the columns displayed aligns with the filter selected.

Editing *Quotes*

Edit function allows you to update all field values of a single record. Mass Edit feature is also available to simultaneously update the same fields of multiple records.

1. **Edit Individual Record**
    1. **From Listview**
        1. Click on the *Edit* link of the record from Action field.
        2. Update the field values in the details page.
        3. Click Save to update your changes.
    2. **From Detailed View**
        1. Click on the Quote name in the list view.
        2. To edit specific fields, hover over the field and click on *Edit*.
        3. Update the field value and click Save to update your changes.
        4. You can also click on Edit button in detailed view to open a form where all the fields are editable and click Save after modifying the fields.
2. **Edit Multiple Records**
    1. In the list view, select the records to edit.
    2. Click Mass Edit button.
    3. Edit fields in the pop-up and click on Save.
    4. The fields of the selected records are updated to new value.

Deleting *Quote*

You can delete unwanted Quote either from Listview or Detailview.

1. List View
    1. Delete Individual Records
        1. Click *del* link against the record in Action column to delete individual records.
        2. Confirm the delete operation.
        3. Listview reflects the changes made.
    2. Delete Multiple Records
        1. Select the records to be deleted.
        2. Click Delete button at the top of the list.
        3. Confirm to delete the records in the pop-up.
        4. Listview reflects the changes made.
2. Detailview
    1. Click on the record in the listview.
    2. Click Delete button in the record detailview.
    3. Confirm to delete the record in the pop-up.
    4. Displays the listview to show the results.

Creating Duplicates

While creating a Quote record, if most of the details of new record matches with an existing record, you can duplicate the existing record with minor edits.

Steps to duplicate a record in **J Morgan CRM**.

Choose the Quote record you want to duplicate.

Click on the Quote record name to go to the detail view.

Click Duplicate button.

In Duplicating Quote record screen, update the fields if required.

Click Save to update the changes.

Quote Edit Form

In J Morgan CRM, you can store Quote details by entering data in Quote detail form. In this form, you need to specify the Quote-related information. The following table provides descriptions of the various fields in the form.

List of Standard Quote-related Fields	
Fields	**Description**
*Subject	Specify the theme of the Quote. This field is mandatory.
*Quote Stage	Set the Status of the Quote.This field is mandatory.
Contact Name	Select from the existing Contacts.you can populate Billing and Shipping Address from here, if necessary.
Organization Name	Select from the existing Organizations.you can populate Billing and Shipping Address from here, if necessary.
Status	Set the status of the invoice.
Billing Address	Enter the Address manually or can also be populated from the Organization.
Shipping Address	Enter the Address manually or can also be Populated from the Organization.
Terms and Conditions	As specified in ***Inventory : Terms & Conditions*** feature under Settings page, or you can make alterations manually.

Item Details Block

You can perform following Operations in this Block

- Click on the icon to select from existing Products and icon to select from existing Services; Consequently, values will be automatically populated in both the cases.
- Select any Currency type from the *Currency* picklist, it will update the values according to the conversion rates.It will display the modified values if you had configured the currencies in Products Module.
- Select the Tax Mode :***Individual***, calculates taxes as configured in Products or Services and ***Group***, sums-up the total amount of Products and Services, and implies taxes as configured in ***Tax Calculations*** feature.
- You can associate different priceBooks to the products and Services to have differentiated price lists for different customer groups.Click on icon to view different priceBooks associated with the Products and Services.
- You can also provide Discounts, Imply Shipping Charges and make adjustments on the Net Total.

Actions

Click on the link *Send Email with PDF* to send a mail along with PDF attachment. Click on the link *Export to PDF* to have a PDF copy of a Purchase Order for yourself.

Once a Quote is approved by the customer, you can directly create a Sales Order or Invoice. Click on *Generate Sales Order* and *Generate Invoice* to create Sales Order and Invoice respectively without having to enter values manually as values will be automatically populated.

Invoice Module

An invoice is a non negotiable itemized statement issued by a seller for the Products and Services rendered to the buyer.Invoice can also be called as a Bill in simple words.It usually contains the Products or Services details, Prices and Taxes, Dates, Parties involved, Address information, Terms and Discounts, and payment methods.

Creating Invoice

You can create an Invoice manually in two different types.

1. Click on the icon in the listview, fill up the fields and click Save button.
2. Click on *Quick Create* dropdown and select *Create Invoice*, fill up the mandatory fields and click Save button.

Getting Started

Once a quotation is approved, an Invoice can be created directly from a Quote detail view. All the required data will be automatically added to the Invoice. When you open the Invoices module, a paged list of invoices will be displayed on your screen. From this screen you can perform operations on Invoices.

Filtering *Invoices*

On successful creation, Invoices are displayed as the Listview in Invoice Home Page.Filter provides the ability to pre-configure the search condition based on field value to short-list the records. It enables you to view the list of records in a desired format.Select an item from the Filters drop-down to view the records in that order. The default option is set to 'All' where all the records are displayed.You can create, edit or delete custom filters.

Create Custom Filter

Click *Create Filter* link next to Filters field.

Fill in the mandatory details in 'Details' section.

Select columns which has to appear in the list view.

Provide inputs on how to filter the records in 'Standard Filters' tab.

You can also define your own rules to filter the records in 'Advanced Filters' tab.

Click Save to view the filtered records.

Edit Custom Filter

Select a custom filter from Filters drop-down list.

Click *Edit* link next to Filters field.

Update the field values.

Click Save to update your changes.

Delete Custom Filter

Select a custom filter from Filters drop-down list.

Click *Delete* link next to Filters field.

Click OK on the pop-up to delete the filter.

Searching *Invoices*

Although the Listview filters the records based on pre-configured field values, you might need to further lookup.

Basic Search

You will be able to perform a quick value lookup in one of field enabled on the current filter through Basic Search.

Choose a filter on which the record has to be searched.

Enter the search criteria against the fields.

Click on Search Now to see the results.

Advanced Search

Switch to this mode, if you prefer to search across multiple fields of records among those filtered in the Listview.

Click *Go to Advanced Search* in Search toolbar to filter records with more details.

Enter the search criteria against the fields.

Click New Condition to add rows to enhance your search.

Once you are done with providing input, Click on Search Now to see the results.

Alphabetic Search

Allows you to search records alphabetically.

Click on the alphabet with which the last name of the record begins.

In all the search methods, search results and the columns displayed aligns with the filter selected.

Editing *Invoice*

Edit function allows you to update all field values of a single record. Mass Edit feature is also available to simultaneously update the same fields of multiple records.

1. **Edit Individual Record**
    1. **From List View**
        1. Click on the *Edit* link of the record from Action field.
        2. Update the field values in the details page.
        3. Click Save to update your changes.
    2. **From Detailed View**
        1. Click on the Invoice name in the list view.
        2. To edit specific fields, hover over the field and click on *Edit*.
        3. Update the field value and click Save to update your changes.
        4. You can also click on Edit button in detailed view to open a form where all the fields are editable and click Save after modifying the fields.
2. **Edit Multiple Records**
    1. In the list view, select the records to edit.
    2. Click Mass Edit button.
    3. Edit fields in the pop-up and click on Save.
    4. The fields of the selected records are updated to new value.

Deleting *Invoice*

You can delete unwanted Invoice either from Listview or Detailview.

1. List View
    1. Delete Individual Records
        1. Click *del* link against the record in Action column to delete individual records.
        2. Confirm the delete operation.
        3. ListView reflects the changes made.
    2. Delete Multiple Records
        1. Select the records to be deleted.
        2. Click Delete button at the top of the list.
        3. Confirm to delete the records in the pop-up.
        4. ListView reflects the changes made.
2. Detail View
    1. Click on the record in the list view.
    2. Click Delete button in the record detail view.
    3. Confirm to delete the record in the pop-up.
    4. Displays the listview to show the results.

Creating Duplicates

While creating a Invoice record, if most of the details of new record matches with an existing record, you can duplicate the existing record with minor edits.

Steps to duplicate a record in **J Morgan CRM**.

Choose the Invoice record you want to duplicate.

Click on the Invoice record name to go to the detail view.

Click Duplicate button.

In Duplicating Invoice record screen, update the fields if required.

Click Save to update the changes.

Invoice Edit Form

In J Morgan CRM, you can store Invoice details by entering data in Invoice detail form. In the Invoice Edit form, you need to specify the Invoice-related information. The following table provides descriptions of the various fields in the form.

List of Standard Invoice-related Fields	
Fields	**Description**
Subject	Specify the theme of the Invoice. This field is mandatory.
Sales Order	Select from existing Sales Orders and the values will be populated automatically.
Due Date	Buyer is liable to pay on or before the due date.
Organization Name	Select from the existing Organizations.you can populate Billing and Shipping Address from here, if necessary.
Status	Set the status of the invoice.
Billing Address	Enter the Address manually or can also be populated from the Organization.
Shipping Address	Enter the Address manually or can also be Populated from the Organization.
Terms and Conditions	As specified in ***Inventory : Terms & Conditions*** feature under Settings page, or you can make alterations manually.

Item Details Block

You can perform following Operations in this Block

- Click on the icon to select from existing Products and icon to select from existing Services; Consequently, values will be automatically populated in both the cases.
- Select any Currency type from the *Currency* picklist, it will update the values according to the conversion rates.It will display the modified values if you had configured the currencies in Products Module.
- Select the Tax Mode :Individual, calculates taxes as configured in Products or Services and Group, sums-up the total amount of Products and Services, and implies taxes as configured in ***Tax Calculations*** feature.
- You can associate different priceBooks to the products and Services to have differentiated price lists for different customer groups.Click on icon to view different priceBooks associated with the Products and Services.

- *Services* are non-stock items.So the field *Quantity in the Stock* in Invoice will be displayed as NA-Not Available.If you would generate an Invoice on the product, the stock units will be reduced and values will be updated in the *Quantity in the Stock* field of *Products* Module.
- You can also provide Discounts, Imply Shipping Charges and make adjustments on the Net Total.

Actions

You can create an Invoice automatically from a *Quote* or *Sales Order* without having to re-enter all the data. Invoices can also be Exported to PDF and Emailed as PDF attachment from the CRM directly. This can be done from the Invoice detailview page.

Marketing Automation

J Morgan CRM provides effective ways to automate the business process that provides value to the customers.It offers different features like Campaign Management, E-mail Marketing, Online Lead Forms and Product Management specifically useful for your organization-wide marketing requirements.It also provides other marketing-related modules such as Calendaring, Contact Management, File Attachments, etc. to help streamline your marketing efforts.

Different features provided by J Morgan CRM to automate the business process:

1. Webforms to capture leads from your Website
2. Campaign Management

Webforms

J Morgan CRM allows a user to create and manage webforms which can be used to capture leads. It also provides ready-to-use html code for its use in Webforms.

Create a *Webform*

Go to Settings Icon > ***CRM Settings*** > ***Webforms.***

Click on the icon to create a new Webform.

Webform properties

The fields in createview of a webform under 'Basic Information Block'.

- *Webform Name*- Provide the name for the webform (must be unique).
- *Module*- Module for which webform is to be created.You can only create webforms on *Leads* Module for now.
- *Assigned To*- The user to whom the created records will be assigned to.
- *Return URL*(optional)- Provide the URL the users should be navigated after submission of the webform.
- In the 'Field Information' block, options are displayed under four columns namely **Field name**, Select the fields that are to be shown on webform; **Override Value**, The value you would enter here will over ride the values entered by users; **Required**, Enable the checkbox to make the desired field mandatory for the users to fill-in and, **Webform Reference Field**, The field name to

be used in webform (HTML code). For mapping with other CMS like Wordpress, the field name must match the Webform Reference Field.

- The mandatory fields are already checked.Because the records cannot be created without the mandatory fields.
- Public ID (shown in details view only)
- The unique ID for the webform generated by CRM. Use this ID to map your existing form to a Webform.For example- suppose there is a webform with publicid 12345. Include following line of code in you form.
- `<input type="hidden" name="publicid"value="316047bd4af125e410cf83ccb6a2bc55"></input>`
- Post URL(shown in details view only)
- The URL to which the webform will be submitted. (<site url for the J Morgan CRM instance>/modules/Webforms/capture.php).For mapping custom forms, ensure to change 'action' value to specified post URL.
- For example in your custom form -
- `<form name="mycustomform" action="http://www.abc.com/myCapture.php" method="post">`
-
- `Change it to`
-
- `<form name="<place Webform name here>" action="<place Post URL here>" method="post">`
-

- **View HTML source**
- To view HTML source, click on Show Form button in detailview.
-
- You can also click on *Show Form* link in the List View.
-

How to use the HTML source

Copy the HTML source and embed it in your Website

Sample form

Response when Return Url is not specified

Integrating existing forms with J Morgan webforms

For instance we will integrate existing forms with J Morgan webforms using wordpress cforms.
1.Create the webform in J Morgan CRM webform module.(copy the Public id and post URL)

2.Install the Cforms plugin in wordpress

3.Create a cform. Add the fields and give the reference field values by editing them.The field mapping should be done here.After the field mapping, update the settings to save the changes.

1. Publicid should be hidden while creating a cform.
2. Webform reference field should be copied from J Morgan webform to cforms as it is .(exceptional case: for Public Id field please give publicid as a reference field

4. Under *Core Form Admin / Email Options*, enable the checkbox *Use custom input field NAMES & ID's* to send form data and give the post URL.Also, enable the checkbox *Send From Data* and provide *Post URL* that is generated in webforms module in **J Morgan CRM**.

5. Create a new webpage or blog post by clicking on ***Posts*** > *Add New*, on Menu Items provided on left side, and embedd the webform by clicking on cforms icon, highlighted below, select the saved cform, and click Publish button present on right side.

6. The newly published webform is visible on your website. so that you can capture the leads from your websites to the J Morgan CRM directly.

Integrating existing forms with J Morgan Webforms(Ex.- using existing HTML form)

consider an existing form-

```
<html>
	<head>
		<title>Demo Form</title>
	</head>
	<body>
		<h1>Enquiry Form</h1>
		<form method="POST" action="http://www.myJ
Morganwebroot.com/modules/Webforms/post.php" name="demo" >
			<input type="hidden" value="Leads" name="moduleName" />
			<table>
				<tbody>
					<tr>
						<td><label>Name</label></td>
						<td><input type="text" name="lastname"
value="" /></td>
					</tr>
					<tr>
						<td><label>Email</td>
						<td><input type="text" name="email"
value="" /></td>
					</tr>
					<tr>
						<td><label>Phone</td>
						<td><input type="text" name="phone"
value="" /></td>
					</tr>
					<tr>
						<td><label>Company</td>
						<td><input type="text" name="company"
value="" /></td>
					</tr>
					<tr>
						<td><label>Comments</td>
						<td><input type="text" name="cf_646"
value="" /></td>
					</tr>
				</tbody>
			<table>
			<input type="submit" value="Submit" />
		</form>
	</body>
</html>
```

Code Snippet-1

To Integrate existing form with J Morgan Webforms.Below examples are based on the code snippet-1.

1.Create a Webform in J Morgan CRM (see the steps to create a webform).

Include all those fields, whose values are to be captured.

2.Go to the detail view of the created webform.

3.Make following changes in the existing form.

1.Include publicid.

```
Ex.
<form method="POST" action="http://www.myJ
Morganwebroot.com/modules/Webforms/post.php" name="demo" >
<input type="hidden" value="<value for publicid in the newly created webform>"
name="Publicid" />
```

2.Change the action to the “Post URL”.

```
Ex.
<form method="POST" action="http://www.demoJ
Morgan.com/modules/Webforms/capture.php" name="demo" >
<input type="hidden" value="<value for publicid in the newly created webform>"
name="Publicid" />
```

3.Change the name of the fields accordingly to the “neutralized field values”

```
Ex.
<td><input type="text" name="email" value="" /></td>
to
<td><input type="text" name="email1" value="" /></td>

<td><input type="text" name="cf_646" value="" /></td>
to
<td><input type="text" name="label:test" value="" /></td>
```

Consider the details of the Webform created for the code snippet-1.

Following would be the modified html code-

```
<html>
        <head>
                <title>Demo Form</title>
        </head>
        <body>
                <h1>Enquiry Form</h1>
                <form method="POST"
action="http://www.demo.com/modules/Webforms/capture.php" name="demo" >
                        <input type="hidden" name="publicid"
value="030470fa40f0357782a8d6a53cd53b58"></input>
```

```
                        <table>
                                <tbody>
                                        <tr>
                                                <td><label>Name</label></td>
                                                <td><input type="text" name="lastname" 
value="" /></td>
                                        </tr>
                                        <tr>
                                                <td><label>Email</td>
                                                <td><input type="text" name="email" 
value="" /></td>
                                        </tr>
                                        <tr>
                                                <td><label>Phone</td>
                                                <td><input type="text" name="phone" 
value="" /></td>
                                        </tr>
                                        <tr>
                                                <td><label>Company</td>
                                                <td><input type="text" name="company" 
value="" /></td>
                                        </tr>
                                        <tr>
                                                <td><label>Comments</td>
                                                <td><input type="text" 
name="label:test" value="" /></td>
                                        </tr>
                                </tbody>
                        <table>
                        <input type="submit" value="Submit" />
                </form>
        </body>

</html>
```

Campaigns Module

J Morgan CRM's campaigns module allows you to create, track, and optimize your marketing initiatives. Marketing campaign goals can vary, from generating brand or promotion awareness, to obtaining new leads, converting leads to new sales, or encouraging existing clients to purchase more products or services. By setting up the campaign parameters, setting the metrics that you would like the campaign to improve, and measuring the outcome, you can assess the success of any marketing campaign.

Many campaigns also have lists of leads or contacts associated with them (although, oftentimes lead-generation campaigns do not). These leads or contacts will then have a marketing function performed on them (a phone call, an email, a piece of mail, etc.) and responses will be recorded on each client record. These lists can be associated with campaigns in J Morgan.

Creating Campaigns and Setting Basic Parameters

You can manually create campaigns by:

1. Open the Campaigns module from the main menu and click on the. Fill out the campaign parameters and click Save.
2. Click on the *Quick Create* drop-down menu on the right side of the main menu, select *Create Campaign*, fill out the campaign parameters and click Save

Upon the successful creation of a campaign it will be listed in Campaigns module home page.

Adding Lists of Leads, Contacts, Organizations, Opportunities, or Activities to Campaigns

For targeted marketing campaigns, J Morgan allows you to add individual records or lists of records to a campaign by navigating to the "More Information" tab from inside the campaign and selecting the type of record for which you would like to add the single record or a list. For instance, to create a Contacts list, Select the pre-configured filter from the drop down and click on Load List button; Instantly, all the contacts in the filter will be populated. Click on the Select Contacts button to select from the existing contacts. To associate a contact record instantly, click on Add Contact button. Select All feature will help you to perform actions on desired number of records. These lists help you in targeting diverse number of customers.

Filtering *Campaigns*

Filters display only the campaigns that meet the criteria that you choose. To apply a filter to your list of campaigns: from the Campaigns module home page select an option from the Filters drop-down menu. The default option is set to 'All' where all the records are displayed. You can create, edit or delete custom filters from immediately to the right of the drop-down box.

Searching *Campaigns*

Although the Listview filters the records based on pre-configured field values, you might need to further lookup. You can perform three types of Search: Basic Search, Advanced Search, Alphabetic Search, to rapidly search through records.

Editing campaigns

The edit-function allows you to quickly access and edit the field values of a single campaign. The Mass Edit button allows the simultaneous updating of multiple campaigns' fields simultaneously.

Creating Duplicates

While creating a Campaign, if most of the details of new record matches with an existing record, you can duplicate the existing record with minor edits.

Steps to duplicate a record in **J Morgan CRM**.

Choose a Campaign you want to duplicate.

Click on the Campaign's name to go to the detail view.

Click Duplicate button.

In Duplicating Campaign screen, update the fields if required.

Click Save to update the changes.

Deleting Campaigns

You can delete unwanted Campaigns either from List view or Detail view.

Associating Campaigns with Other Records

After creating campaigns, you can associate them with other records.

The following are the records you can associate campaigns with.

Contacts: Displays the contacts added for mass mailing.

Leads: Displays the leads generated through campaign.

Opportunities: To display the Opportunities converted through campaign.

Activities: To add tasks and

events.

Organizations: To list out the Organizations after successful lead conversion.

Inventory Automation

Inventory Management Features

J Morgan CRM supports more complete sales cycle management by integrating Inventory Management functions, such as Products, Price Books, Vendors, Sales Quotes, Purchase Orders, Sales Orders, and Invoices with CRM modules, such as Leads, Accounts & Contacts, and Opportunities. Using J Morgan CRM you can achieve the seamless integration between pre-sales and post-sales activities in a single application.

J Morgan CRM provides a Products Management module to capture and use product information, including pricing, so that your sales team and other staff can apply this information in their sales, marketing, support and other customer related activities. the J Morgan CRM Products Management module provides the following features.

- Manage organization-wide product information
- Associate products with other modules for a better 360 degrees view
- Import product details from other applications
- Create custom product fields as per your organization's requirements
- Attach product-specific documents, such as collateral, license agreements, and others
- Upload product images for easy identification
- Export product details to spreadsheet software, such as Microsoft® Excel®, OpenOffice®, and others for further analysis
- Create Price Books as per customer segment and associate products with Price Books
- Procure products from the selected vendors list

J Morgan CRM provides functionality to anable sales teams to easily generate sales quotes for customers. The J Morgan CRM Sales Quote module provides the following features.

- Track outstanding quotes from the quotes list view
- Add line items to the quotes and update subtotal, taxes, adjustments, and grand total amounts
- Select different prices for the same product as per customersegment
- Create printer-friendly Sales Quotes and deliver to the prospect customers through inbuilt E-mail service
- Create Sales Order or Invoice with a single click from the Sales Quote
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses of the prospect
- Display quotes related to accounts under the related list
- Customize Sales Quote fields as per your organization's requirements

Once a sale is made, Order Management kicks in, which is a set of functions to ensure the order is properly serviced and fulfilled for the customer. J Morgan CRM provides a number of features in support of Order Management.

- Streamline organization-wide procurement and fulfillment processes with integrated approach of J Morgan CRM
- Track outstanding orders from the orders list view
- Procure products from the best available Vendors/Manufacturers/Resellers list in J Morgan CRM
- Manage up-to-date stock position by seamless integration between order fulfillment and available stock in your warehouse
- Customize Purchase Order (PO) and Sales Order (SO) fields as per your organization requirements
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses of the prospect while creating orders
- Add line items to the Orders and update subtotal, taxes, adjustments, and grand total amounts automatically
- Create printer-friendly Order (PO/SO) and deliver to the Vendors/Customers through inbuilt E-mail service
- Once the Sales Order is accepted, create Invoice from Sales Order with a single click
- Periodically notify the stock position to the parties concerned in your organization so that stock is always available to fulfill the outstanding orders

J Morgan CRM also provides a set of functions to support generation of Invoices. Invoices for customer billing are a critical step once a customer order has been fulfilled.

- Track outstanding invoices from the Invoices list view
- Create printer-friendly Invoices and deliver to the customers through inbuilt E-mail service
- Customize Invoice fields as per your organization requirements
- Add line items to the Invoice and update subtotal, taxes, adjustments, and grand total amounts automatically
- Customize Invoice fields as per your organization requirements
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses of the customer while creating invoices
- Associate invoices with the General Ledger account for hassle-free Book Keeping

Support Automation

J Morgan CRM empathizes the requirements and delivers the finest solutions to the end users(Customers). Customer delight is the goal of Support automation.**J Morgan CRM** offers different modules, listed below, to resolve issues related to the customers. *Tickets* can be used to handle customer support issues, queries, and other service requests. ***Customer portal*** feature under Settings page enables customers to log-in, report, track issues and search for answers from a knowledge base. *FAQ*(Knowledgebase) can be used to help customers find quick solutions to their queries and support issues. *Service Contracts* helps to track service agreements.

Service Contracts Module

About

Service Contracts is a requisite to maintain healthy trading relationship. Also, this will establish an off-contract between two parties.This module can be helpful to track both support and professional service agreements.

Create

Steps to create *Service Contract* in **J Morgan CRM.**

A *Service Contract* can be created from the *Quick Create* menu or from *Support* > *Tickets* > Click on the "+" icon. Following snapshots will illustrate the create view and detail view of a *Service Contract*.

Create View

The table explains different fields in Create view of *Service Contracts*.

Related to	When *Service Contract* is added to a *Service* from *Invoice*, *Quotes*, *Sales Order* or *Purchase Order*, the *Related to* field of *Service Contract* will be automatically updated with the Organization or Contact related to the *Service*. Generally, **J Morgan CRM** would prefer *Organization* to *Contact*.
Start Date	User can set start date of service here.
Due Date	User can set expected end date of service here.
Tracking Unit	Select the measurement unit of service from dropdown.
Total Units	Specify the number of units allocated.
Used Units	Sum of the units utilized by each of the closed *Ticket* associated with the *Service Contract*.

Detail View

The table explains different fields in Detail view of *Service Contracts*.

End Date	Updated when *Status* is set to *Complete*, or *Used Units* reaches or exceeds *Total Units*.
Planned Duration	Auto-generated when *Service Contract* is completed.Calculated as (Due date - Start Date).
Actual Duration	Auto-generated every-time the record is saved, or when the *Used Units* is updated.Calculated as (End date - Start Date).

Tracking Unit	Based upon this, the number of *Used Units* are computed when related ticket is closed.When *Service Contract* is added for a *Service* from a Invoice, Quotes, Sales Order or Purchase Order, the *Tracking Unit* will be filled up with *Usage Unit* of that *Service*.
Progress (in %)	Indicates the progress (in %) of the Service Contract. Auto-generated every-time the record is saved, or when the *Used Units* is updated. Calculated as (*Used Units*/*Total Units* * 100).

Some of the fields are not shown in create view. Values for these fields are auto-computed in detail view based on the values of other fields.

You can also create *Service Contracts* at an item level (only for Services) while generating the Invoice, Quotes, Sales Order and Purchase Order. This can be done by clicking on icon, highlighted below.

Associate *Service Contract* and *Ticket*

A *Contact* can be able to include the *Service Contract* while creating the *Ticket*.This can be achieved from ***Customer Portal*** feature in **J Morgan CRM**.You can find this under settings page.On closing the *Ticket*, the *Used Units* field will be updated.

Ticket(s) can be associated to the *Service Contract* either by ***Select Tickets*** or by ***Add Ticket*** operations. This can be achieved by clicking on *Service Requests* link in More information tab.*Ticket(s)* can also be deleted from the *Service Contract*.The status of a ticket associated with one or more Service Contract(s) will be changed.When a *Ticket* is associated with a *Service Contract*, If the 'Related To' field of the Ticket is empty, It will be filled with the 'Related To' field of the *Service Contract*.

Related To field will be updated only if the ticket is associated with *Service Contract*, not during Ticket creation.

When the Status of a *Ticket* changes, the *Used Units* fields of all the *Service Contracts* with which the Ticket is associated, will be re-computed

Field *Used Units*

Computation of *Used Units* depends upon the *Status* field of the *Tickets* module, and *Tracking Unit* dropdown of *Service Contract*.

Steps to calculate *Used Units* field

Tracking Unit	**Ticket Status**		**Used Units**
Incidents	Closed		Used Units + 1
	Re-Opened		Used Units - 1
Days	Closed	'Days' for ticket mentioned	Used Units + 'Days' of Ticket
		'Hours' for ticket mentioned	Used Units + ('Hours' of Ticket / 24)

	Re-Opened	'Days' for ticket mentioned	Used Units - 'Days' of Ticket
		'Hours' for ticket mentioned	Used Units - ('Hours' of Ticket / 24)
Hours	Closed	'Hours' for ticket mentioned	Used Units + 'Hours' of Ticket
		'Days' for ticket mentioned	Used Units + ('Days' of Ticket * 24)
	Re-Opened	'Hours' for ticket mentioned	Used Units - 'Hours' of Ticket
		'Days' for ticket mentioned	Used Units - ('Days' of Ticket * 24)

FAQ Module

Knowledge Base

The CRM system offers you to have a FAQ list. FAQ refer to listed questions and answers, all supposed to be frequently asked in some context, and pertaining to a particular issue. You may use this for instance

- as a knowledge base to inform your customers about your products, services or procedures,
- for your employees to inform on internal business procedures,
- for your service staff to discuss procedures for helping customers, and much more.

You may see the FAQ list from Support > FAQ menu. Click the “+” icon to enter a new FAQ. In the image below you can see the screen for creating a new FAQ. You may enter a question and an answer. In addition, you may

- link this entry to a product or service your company offers,
- assign a category for this entry,
- set a status for the entry.

A FAQ will be shown in the Knowledge Base if the Status is set as “Published”. A ticket can also be converted to FAQ. By using the “Convert As FAQ” in the Actions section of the detail view of a ticket, a FAQ can be created from Ticket.

Creating FAQ

Over a period, customer support helps your organization to build a rich knowledge Base for future reference. Knowledge Base in the form of articles and frequently asked questions enables you solving the repetitive problems encountered by your customers. Also, these serve as real time solutions for various issues as it is populated by customer’s actual experiences.

In the FAQ: Edit form, you need to specify the FAQ-related information. The following table provides descriptions of the various fields in the form.

List of Standard FAQ Fields

Field Name	Description	Data Type
Product	Select the name of the product.	Lookup
Category	Select the category of the FAQ.	Text box, Alphanumeric (255)
Question	Select the priority of the ticket from the drop-down list.	Text box, Alphanumeric (255)
Answer	Select the status of the ticket from the drop-down list.	Text box, Alphanumeric (255).
Status	Specify the status of the FAQ	Pick list
Assigned To	Select the J Morgan CRM user's name to which the ticket is assigned.	Pick list
Description	Specify any other details about FAQ.	Text Area (long text)
Comments	Specify additional comments about the ticket	Text Area

To create FAQ

1.Click the **Support » FAQ** tab.

2.In the *FAQ: < > page*, enter the FAQ details.

Question and Answer are mandatory fields.

3.Click **Save** to save the FAQ details.

Viewing FAQ

Before replying to the tickets, you may refer to the existing FAQ. If the required solution is already available in FAQ, you can save a lot of time and enhance the productivity. If the solution is not available, you can add a new FAQ item so that all the customer support persons can use the solution in future while encountering a similar problem.

To view the FAQ

1.Click the **Support » FAQ** tab.

2.In the *Tickets Home page*, under the **FAQ section** click the View FAQ hyperlink.

3.In the *FAQ Home page*, under the FAQ List section list of FAQ select the required FAQ. In the *FAQ: <FAQ>* page the answer for the question is displayed.

Tickets Module

In the CRM terminology, tickets are any kind of customer service requests as they occur after sales. The support functions help you to collect and sort customer requests, inquiries, disturbances, problems etc. related to sold goods or services. The support functions keep CRM users and customers informed on the status reached in respect to the response to customers messages. Sales staff and management can get a quick overview of support activities related to customers or products or both.

To create Tickets

1. Go to 'Support' > *Tickets*.
2. Click on the + icon.
3. In the Create view, enter the *Ticket* details.
4. Click ***Save*** to update your details. Ticket details are displayed in detail view page where you can perform the additional operations. Refer to the 'Associating Tickets with Other Records' section for more details.

List of Standard Ticket-related Fields.

Field Name	Description	Data Type
Title*	Specify the title of the ticket. This field is mandatory.	Text box, Alphanumeric (255)
Priority	Select the priority of the ticket from the drop-down list.	Pick list
Status	Select the status of the ticket from the drop-down list.	Pick list
Group	Select the group of the ticket from the drop-down list.	Pick list
Category	Select the category of the ticket from the drop-down list.	Pick list
Submitted By	Displays the name of the contact.	-
Assigned To	Select the name of the J Morgan CRM user to whom the ticket is assigned.	Pick list
Contact Name	Select the name of the contact who submitted the ticket.	Lookup
Description	Specify details about the ticket.	Text Area (long text)
Comments	Specify follow-up notes about ticket.	Text Area (long text)

To create Tickets instantly

1. Click the 'Support' > *Tickets* tab.
2. Enter the mandatory details, such as *Ticket Title* and *Priority*.
3. Click **Save**. Ticket details are displayed in the list view where you can update more details to perform the additional operations.

Working with Tickets

On successful creation of ticket, an email notification will be sent to the user or a group that was selected in *Assigned to* drop down. If you have the ticket related to a contact or organization, every time you make changes to the ticket, an automatic email will be send to the related entry, informing about the changes. Each ticket can go through different working stages and will be closed sooner or later. The CRM will help you to keep track of the working progress, and records the changes. Any CRM user who has access to edit the ticket can post a comment.The comments will be sorted in chronological order and indicate the CRM user who made the comment. At the end of the life cycle of a ticket, you may present the solution. If you do not want such an email notification to be sent out you have to enable the check box *Email Opt out* of the related contact. All changes to a ticket are displayed at the ticket history. The information allows you to track the following:

- Who changed the ticket information?
- What changes have been made?
- What was the time line of changes?

To view or to add ticket related activities, documents or services can be done from the 'More Information' tab.

Navigating Tickets

You can navigate *Tickets* available in the Tickets List. To navigate trouble tickets.

1. Click the 'Support' > *Tickets* tab.
2. In the *Tickets List* section, click the Start, Previous, Next, or End link to access the respective list of *Tickets*.

Searching Tickets

You can search tickets with basic details, such as Ticket No, Title, Related To, Status, Priority and Assigned To.You can refine your search by providing more details in advanced search. To achieve this click on *Go to Advanced Search* link. You can also search tickets alphabetically. To search tickets,

1. Click the 'Support' > *Tickets* tab.
2. In the *Tickets Home page*, click the 'Search icon' under toolbar.
3. Provide the basic search criteria in text space provided, Select relevant value from the drop down and click ***Search Now*** *button.*
4. Click on the link *Go to Advanced Search*.This block contains three columns.Select desired information from pick list in first column, set desired relation from pick list in second column, and enter one or multiple items in third column manually. Items you enter in third column should be separated with commas.

To create duplicate Tickets

Duplication can be performed to view the copy that exactly corresponds to an original ticket.

1. Click the 'Support' > *Tickets* tab.
2. click on desired ticket to perform operations.
3. In the detail view of the ticket, click on ***Duplicate*** button to view two exact copies of same ticket.
4. click on ***Edit*** to modify some of ticket-related details.
5. click ***Save*** to update your changes.

Associating Tickets with Other Records

You can be able to associate the ticket with related modules such as *Activities*, *Documents*, *Ticket History*, *Activity History*, *Services*, *Projects*.To achieve this click on *More information* link in detail view of a ticket.

1. *Activities*: Click on ***Add To Do*** or ***Add Event*** to Schedule meetings or calls.
2. *Documents*:Click on Add Documents to associate a new Document with the ticket and Select Document to associate with existing document(s).
3. *Ticket History*:To view all the operations and actions performed through'out the life cycle of the ticket.
4. *Activity History*:To view all the activities performed on the ticket.
5. *Services*:Click on ***Select Services*** to associate the ticket with existing Service(s). This can be done in case if the ticket is related to the service.
6. *Projects*:Click on ***Select Projects*** to Associate the ticket with existing Project(s).

Converting Tickets to FAQ

Once the customer’s ticket is successfully resolved, you can convert the ticket to FAQ for a better reference in future.

Steps to convert Ticket to FAQ

1. In the Tickets Home page, select the ticket to be converted.
2. In the Ticket detailed view, click the *Convert to FAQ* link.
3. In FAQ edit view, update the FAQ information and click ***Save***.

Deleting Tickets

Rarely, you may need to remove the unnecessary tickets, which are not tracked further. This will help you manage your tickets in a better way. You can delete tickets either individually or in bulk.

Warning: Deleting tickets is a destructive operation, hence use this option carefully.

To delete Tickets individually

1. Click the 'Support' > *Tickets* tab.
2. In the ticket home page, select the ticket to be deleted.
3. Click on ***Delete***.In the confirmation dialog, click ***OK*** to delete the ticket permanently.

To delete Tickets in bulk

1. Click the 'Support' > *Tickets* tab.
2. In the tickets list view, select the tickets to be deleted using the Select check box (first column).
3. Click on the ***Delete*** button.
4. In the confirmation dialog, click ***OK*** to delete the selected tickets permanently.

Project Management

A Project Management is a well organised and systematically planned endeavor, defined with beginning and ending, to accomplish a successful project.

J Morgan CRM provides three different modules to execute Project Management.

1. Projects
2. Project Tasks
3. Project Milestones

You can find the project management related modules under *Support* tab.

Projects Module

In this stage, project manager can be able to create a project and define target boundaries by setting up Start Date, Target End Date(tentative end date of the project) and Actual End Date.Prevailing the situations, priority and budgets of the project can also be specified.Every Project created can be related to a particular Contact or Organization which can be done through the *Related To* field. Each project can also have a unique description.

The Projects module works in co-ordination with the other 2 modules.

1. Project Tasks.
2. Project Milestones.

The Create View of the projects module is as shown in the below screen shot.

In the detail view of a projects module, the related modules can be found under *More Information* tab.The screen shot below shows the related list of the projects module.

Every project can be associated with one for multiple project tasks and project milestones. Based upon the progress of the Project Tasks and the milestones set, the charts will be displayed in the More Information Tab.

In the above snapshot, Progress Chart is generated based upon the status and target dates of *Project Task*, and Milestone date of *Project Milestones*.

You can also add *Documents* or *Tickets* from the *More Information* tab for each project.

Project Tasks Module

This module can also be used independently without associating with *Projects* module.A Project Task can be assigned to a group or any individual user to accomplish the task within the specified timeline.

The *Related to* field can be used to associate a project to the project task.

Every created task can be updated with the progress. Based upon the value of this field, the Charts in the Related list of *Projects* will be evaluated and deployed.

Project Milestones Module

The *Project Milestones* module should always be coupled with the *Projects* module. It cannot be used as an independent module. For every project that is created, a number of milestones can be set through the *More Information* tab of the *Projects* module.

The screen shot below shows that for every project, it is possible to create a number of milestones.

Project milestones can be created in one of the two ways.

1. From the More information tab of the Projects Module (as shown in the above screen shot)

2. From the Create view of the Project Milestones module.

The Create view of the Project Milestones is as shown in the screen shot below.

The list view is as shown in the screenshot below:

The detail view is as shown in the screen shot below :

Activity Management

- Events
- Tasks
- Email
- SMSNotification

Calendar Module

Calendar module enables users to keep track of calls, meetings, and tasks. Users can collaborate on activities and maintain a history of all previous activities by linking them to specific records in the CRM (Ex: Organizations, Contacts, and Opportunities). J Morgan CRM offers 2 types of Calendar records:

Events: scheduled calls and meetings.

To Dos: tasks to complete within a given time frame.

Events and *To Dos* together are called **Activities**.

Administrator can add new Event Types from the Settings page.

Calendar Home Page

There are two possible views in the homepage of Calendar Module.

Calendar

- Calendar can be viewed in different views namely: *Day*, *Week*, *Month*, and *Year*.
- The default view of Calendar is *Week* for admin users and *Day* for normal Users.
- Users can change their default view; to achieve this, go to *My Preferences* and select desired view in the *Default Calendar view* picklist field.
- And again, you can switch to either Calendar view or Listview for *Events*.
- To Dos can only be displayed in Listview.

You can switch to either calendar view or listview.Click on the picklist highlighted below.

You can check other users availability by selecting the user from 'view-of' drop down.

You can only check the activities that are assigned to you and the activities of users below you in hierarchy.

All Events & To Dos

Displays the list of all Events and To Dos that are scheduled.The list depends upon the filter you would select.

Add Events & To Dos

You can create activities from Calendar module and associate them with records or create activities directly from specific records.

From Calendar Module

Schedule Events

- In *Events* tab, click Add and select Call / Meeting.
- In Create Event screen, select the 'Event Type' as either *Call* to schedule a call, or *Meeting* to create a meeting request.
- Enable the checkbox *Mark Public* to make the event available to other users.You can limit the availability through Calendar Settings.
- Provide a label, description, and location to your event in the text fields *Event Name*, *Description* and *Location* respectively.
- Set the status and priority of the event.
- Assign a owner(s) to the event by selecting a value from the *Assign To* picklist.
- If you would enable the checkbox *Send Notification*, an email will be sent to the user(s) notifying that the Event has been assigned to him.
- Schedule the timeline for the event by setting values in *Event starts at* and *Event Ends on.*

Event start date and time should be greater than equal to current date and time.
Event end date should be greater than or equal to event start date.By default, the event end date will be populated five minutes post to event start time.

- Provide inputs to Invite Users, Set Reminders, send notifications, Enable repeat, and Relate Event to record if required.
- Enter other details of the event.
- Click Save to create the event.

Create To Dos

- In To Dos tab, click Add and select To Do.
- In Create To Do screen, enter the details of the task.
- Provide inputs to Send Notifications, Relate Task with a record, if required.
- Click Save to create the To Do.

From Specific Records

Schedule Events

- Navigate to the record detail view (such as Organizations record or Contact record) to which the event is to be associated.
- Click *Add Event* link from 'Actions' menu or go to 'Activities' section and click Add Event button.
- In **Create Event** screen, select the 'Event Type' as either
  - 'Call' to schedule a call or
  - 'meeting' to create a meeting request.
- Provide inputs to invite users, set reminders, send notifications and relate event to record if required.
- Enter other details of the event.
- Click **Save** to create the event or **Cancel** to go back.

Create To Dos

- Navigate to the record detail page to which the to do is to be associated.
- Click *Add To Do* link from *Actions* menu or go to *Activities* section and click Add To Do button.
- In **Create To Do** screen, enter the details of the task.
- Provide inputs to send notification, relate to do with a record, if required.
- Click **Save** to create the To Do or **Cancel** to go back.

Search Activities

Basic Search

- Choose a filter on which the activity has to be searched.
- Enter the search criteria against the fields.
- Click on Search Now to see the results.

Advanced Search

- Switch to this mode, if you prefer to search across multiple fields of events among those filtered in the Listview.
- Click *Go to Advanced Search* in Search toolbar to filter events with more details.
- Enter the search criteria against the fields.
- Click New Condition to add rows to enhance your search.
- Once you are done with providing input, Click on Search Now to see the results.

Alphabetic Search

- Click on the alphabet with which the activity name begins.

In all the search methods, search results and the columns displayed aligns with the filter selected.

Operations on Activities

You can only modify or delete activities that you own.

- View the activity and click **Edit** button to update, and **Delete** button to delete it.
- Alternatively, click the edit / del link from 'Action' field in Calendar.

- You can close the activity by clicking on X mark icon under Close column in listview of activities, or change the status as *Held* in detail view of the Activity.
- In the calendar view, click on the Icon to perform operations like *Mark Held*, *Mark Not Held*, *Postpone*, *Change Owner* and *Delete*.

Change Ownership

You can delegate the activities you own to sub-ordinate users.

- Go to 'All Events & Todos' tab.
- Select the activity and click **Change Owner**.
- Select a user from the drop-down.
- Click Update Owner to save the changes.

Alternatively, edit the activity, and update the **Assigned To** field.

Duplicate Existing Events

If an existing activity has most of its details common to the new activity to be created, you can create a copy of the existing activity and modify it.

Steps to duplicate Activity:

- View the activity you want to duplicate.
- Click **Duplicate** button.
- In Duplicating activity screen, modify the fields if required.
- Click Save to update the changes.

Send Notification

While creating the activity, select **Send Notification** check box to send an email notification to the owner of the Event/Task.The User/Group selected in *Assigned to* field will be the owner of the Event/Task.

Set Reminders

You can choose to send reminders to the participants before event commencement. If the events happen to occur continuously, repeated reminders can be set till the due date.

Two types of reminders will be sent from J Morgan CRM before the event commencement.

1. Email notification will be sent to the owner of the event at the scheduled time.
2. A popup message will be appeared on your CRM at the scheduled time. You can schedule the appearance of popup from *Reminder Interval* field in *My Preferences* page.

For example from the below scheduled event, the reminder has been set on **0 days-1 hour-5 mins** before the commencement of the event.

A popup reminder will be displayed on your J Morgan CRM.Click on *More* will take you to the detailview of the Event and click on *Postpone* will postpone the popup reminder.

Enable Repeat

For recurrent events you can enable repeat so that the phenomenon will be repeated periodically. Every-time reminder, if enabled, will be sent to the owner of the event.

You can schedule repeat on the following

Day(s)

Week(s)

Month(s)

Year(s)

From the snapshot below, Repeat has been enabled on every **1 Month-On 2nd of Month-Until 24-07-2012** ever since the event has been created.And again, you are privileged to choose the day or week in that month.This would be helpful to charge or pay monthly payments and bills.

Invite Participants

From 'Invite' tab, you can invite users to get involved in calls and meetings.

- Select the users from the available list.
- Click Save to update the changes.
- This triggers an email to the selected users to notify about the event.

Relate Activities to Records

An activity or a task can be linked to a record in other modules through 'Related To' field.

Events can be associated with the record in *Leads, Organizations*, *Contacts*, *Opportunity* or *Tickets* module.

Whereas, **To Dos** can be associated with the record in *Leads*, *Organizations*, *Contacts*, *Opportunity Quotes*, *Purchase Order*, *Sales Order*, *Invoice*, *Campaigns* or *Tickets* module.

- In 'Related To' tab, select the modules from the drop-down and choose the corresponding record.
- Select the related contact in **Contacts** field.

Calendar Sharing

You can configure time formats and sharing rules of your calendar.Click on the Calendar Settings Icon to get started.

Click on the checkboxes under 'Time Settings' block to configure your Start time and Time format.Click on the checkbox *Start my calendar time at* and configure the time. The time scheduled for Events/Tasks you would create should be greater than your calendar start time;As a result, the Events/Tasks will be displayed in Day view, Week view and Month view.

By default, Calendars are private and are not shared across users. Only superiors can view/edit their subordinates calendar in the role hierarchy.

Superiors can also share their calendar-events with subordinate users by

1. Marking the event as *Public* and
2. Share their calendar through 'Calendar Settings'

Whereas, To Dos cannot be shared with other users.

Shared users only have viewing rights on the public events. They cannot modify it. Events that are not marked 'Public' are shown as 'BUSY'.

Steps to share the calendar with other users:

- Mark the event as 'Public' while creating it.
- Click on Calendar Settings icon.
- Select the users with whom the calendar is to be shared.
- Click Save to update changes.

Calendar Settings

Calendar Settings allows you to customize your calendar to add new event types and fields.

Custom Event Types

Calendar module offers a feature to customize event types apart from the default values. You can add new event through **Picklist Editor**.The new event will be listed under the Add button.

1. Go to the Settings Icon > ***CRM Settings*** > ***Picklist Editor***.This can be found under 'Studio' block.
2. Now, Select Module as *Events* and Picklist as *Activity Type*.
3. Click Add Item button.
4. Enter the new event label in the text area provided.
5. Select roles to whom this event is to be assigned.
6. Click Save to update the changes.
7. Only editable event can be edited or deleted through Edit or Delete buttons.
8. You can assign custom event to different roles through Assign button.

As a result, the custom event will be listed under the Add tab under calendar Module.

Custom Fields

Custom fields are the user-defined fields which are used to gather additional information from the users apart from the default information.

- Click on Calendar Settings icon.
- Click on the link ***Calendar Custom Fields.***
- Select the activity type, Event or Task, to which the new field is to be added.
- Click New Custom Field button.
- Select one of the field types in the pop-up window.
- Enter the label for the new field and other details.

- Click Save to save the changes or **Cancel** to go back.

Only Administrator can add custom fields in Calendar module

For instance, the phone field is added as a new Custom Field.

The custom field will be displayed while creating an Event.

Use cases

Upcoming events Scheduled today

Calendar Module

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- Click on the link ***Calendar Custom Fields.***
- Select the activity type, Event or Task, to which the new field is to be added.
- Click New Custom Field button.
- Select one of the field types in the pop-up window.
- Enter the label for the new field and other details.
- Click Save to save the changes or **Cancel** to go back.

Only Administrator can add custom fields in Calendar module

For instance, the phone field is added as a new Custom Field.

The custom field will be displayed while creating an Event.

Use cases

Upcoming events Scheduled today

SMSNotifier Module

Taking advantage of the growing number of consumers using their mobile devices, the companies have started advertising their Products and Services to them. Sending SMS to their Clients and Suppliers will allow them to communicate faster and stay in touch with them.

By using *SMS Notifier* module in J Morgan CRM you can communicate with your clients faster by sending personalized SMS Messages to customers. Consequently, you can increase your sales and strengthen the relationship with your customers.

SMS Server Configuration

To send SMS you need SMS service provider details; This can be filled by administrator from Settings page.

Few simple steps to configure SMS Server in **J Morgan CRM.**

1. Go to Settings Icon > Module Manager.This can be found under 'Studio' block.
2. Click on Settings Icon next to SMS notifier.
3. Click on the link ***Server Configuration.***

You can configure SMS Server information by clicking on ***Server Configuration.***

Click on the Add New button and provide SMS provider information.

The login details will be provided by your SMS provider.You will have to register and buy login credentials from them.

Working

Sending Bulk SMS

To send SMS in bulk, go to the list view of Leads, Contacts, or Organizations, Select the desired number of records and click on Send SMS button.

When you click the button it will show all the phone fields available for that module.You can select the field to which you want to send SMS and click on Select button.

```
The phone number should be a 12 digit number in the format +(country code)(10 digit
mobile number)
For ex:+919999999999
```

Compose SMS

This will now open a compose window block to type in your message. Click on Send to send the message.

SMS Log Details

Once a SMS is sent, the entry will be saved as a record in the *SMS Notifier* module. The detailview contains the message body and status of the message.*Assign To* field is the user who has sent the SMS.

SMS Status

The status of the message can be Delivered, Processing or Failed.The status information can be shown, indicated with colors, in detail view of the SMS record.

More Information

When an SMS is sent to the record(s) of any module (like Organizations, Contacts or Leads), the history of messages sent will be listed in *More Information* tab of the particular record.

SMS Task with Work flow

Create a ***Work Flow*** and save it with desired conditions.Click on New Task and select SMS Task to automate the process of sending SMS.

Create SMS Task

Provide a label to the task and set the Status of the workflow.From the Recipients field, select the number of users to whom the message should be sent. While composing the message, Select the field values from the dropdown to fill the values in the text area below.

SMS Providers

J Morgan CRM package comes with one default SMS Provider.You are privileged to add more SMS providers.

To install more SMS Providers, go to CRM Settings > ***Module Manager*** > Custom Modules > Click on Import/Upgrade button.

You will find TextAnywhere SMS Module.Click Install to install the module.

Installation

For OpenSource J Morgan CRM, you will have to enable the SMS Notifier during installation.

SMS Notifier is an Optional Module.You will have to enable it during installation to use it.

Open Source J Morgan CRM users can Install more SMS Providers from the following link.Click Here

Writing Custom Providers

If you have planning to use SMS service provider and don't find the connector to it, you will need to write one.

SMSNotifier module defines ISMSProvider (`modules/SMSNotifier/ext/ISMSProvider.php`) interface which should be implemented by your custom provider.

A template sample provide is available at:
`modules/SMSNotifier/ext/providers/MyProvider.php.sample`

Also look at ClickATell provider implementation:
`modules/SMSNotifier/ext/providers/ClickATell.php`

Reports Module

You may summarize your data stored in the CRM by reports. You have a set of predefined reports available which you can customize to your needs. You may use these report features to get an overview of customer related activities and to draw conclusions on how to improve your sales process.You may get a report for almost any data you have stored in your **J Morgan CRM.**

Creating a Report

To create a report, you have to select a primary module which can be selected from list of entity modules;As a result, a popup window opens up showing Step-1 of report creation.

Step-1

In Step-1, you will have to provide a name, description and select the folder in which you would like to create the report.

The report name you would provide should be unique. Once the validation for Step-1 is successful, you will be redirected to Step-2.

Step-2

All the related entity modules for Primary module will be displayed. You can proceed either by selecting multiple modules or even without selecting any related modules at all.

Step-3

you can choose either Summary format or Tabular format as a type of report.

1. Summary Format:Reports provides us an option to select fields based on which we can group the records
2. Tabular Format:Shows the general tabular view without any grouping specifications.

Step-4

You can select the fields to show in detail view of a report. These fields can be selected from the modules selected to create report.

Step-5

Only shown for the Summary Type report where we can select field to group records for report and sort them either in ascending or descending order.

Step-6

You can select the calculations for the Integer fields available across the modules selected to create report. We can select the calculations like SUM, AVG, MIN and MAX values across the records selected.

Step 7

we can specify the conditions to filter the results in a report. We can specify conditions in standard filters or Advance Filters. Standard filters have fields like Date & Time fields where as advanced filters have all the fields from the selected modules where the comparator and condition can be choosed based on type of field selected. We are allowed to provide a maximum of 5 conditions.

Step 8

we can opt for the security of the report. Here you can select the type of report Sharing(Public, Private or Share).

Public - Report can be viewed by all the users but can only be edited by users with higher Role (than report owner)

Private - Report can only be viewed and edited by Owner and users with higher Role (than report owner)

Share - Owner of the report can share report with selected users or groups. But, the report can only be edited by Owner and other users whose roles is higher to the role of Owner.

More

- DetailView

Reports Detailview is divided into two parts, Main content and Calculations.

MainContent of the reports contains the data of the fields that are selected to display in the report.

Calculations part of the reports contains the calculations of the fields that are selected for calculations in the report.

Apart from content and calculations, The Detailview holds the operations like exporting the report to Excel or PDF, To Print, Customize the Report, Navigate to Other Report and Filter the report results.

Customizing the Report is just like Editing the Report from Detailview of the Report
Filtering the results in a report can be done through the standard fields provided

- ListView

Reports ListView is basically splited into three parts. Default Reports, Custom reports and Actions are the three parts of list view. Actions part in ListView comprises of operation like Mass Delete, Moving Reports, Creating Folders and Creating Reports

We can select multiple reports in the list view and delete them using mass delete option. Default reports are not provided with delete option.

Reports can be moved from one folder to other using the move button in actions list.

Reports Charts

After the report is being generated, the charts will be visible in the bottom of the reports Page itself.

Click on the View Charts to see the charts element present at the bottom of reports detail page. The following screen-shot shows the reports charts after the click of view charts.

Click on the Add Chart To Home Page to add report chart directly to the homepage as a widget.Click on Add Chart to Home Page button and a popup will be shown. In this popup the report name will be automatically filled and the user will be allowed to input a Widget Name that will be visible on the homepage. Also, the chart type can be selected using the dropdown for Chart Type. The following screen-shot shows this.

The ChartType drop down has 3 values : Horizontal Bar Chart, Vertical Bar Chart and Pie Chart as shown in the following screen-shot.

After clicking on the save button a message will be displayed that the widget has been added to homepage successfully.

Adding Report Charts from HomePage

We have added a new Widget Type called “Report Charts” in the Home Page. The following screen-shot shows this newly added Widget Type.

On clicking on the Report Charts Entry which is a hyperlink, we will get a new popup.

In this Popup, the user can select 3 things: 1. Window Title 2. Report Name: This field is a drop down which has all the report names which are of summary type and having a group by condition. 3. Report Type : drop down to select the type of chart(Horizontal Barchart,Vertical Barchart or Piechart). On click of the save button in the popup, the widget will be added to the homepage

There is also an edit icon which allows the user to change the chart type even after adding the chart to the homepage.

In the above we can see that we have selected the Horizontal Barchart and trying to change the charttype from vertical to Horizontal. On click of save button, the Vertical BarChart will be replaced with the Horizontal BarChart.