Customer Relationship Management-CRM

Take control of your business
Access to every customer history
Personalized sales

SalesGrow CRM

Grow your Sales & Business
An Essential CRM Solution delivery quickly and affordably

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Grow Sales.Grow Business

Contents

1. Overview

SalesGrow CRM is an On-demand Customer Relationship Management (CRM) software for managing your customer relations in a better way. SalesGrow CRM software helps streamline your organization-wide sales, marketing, customer support, and inventory management functions in a single system.

Understanding SalesGrow CRM

Get an insight into the basics and know your SalesGrow CRM better.

Getting Started

Get started the easy way with some initial setup and customizations.

What's New?

Find what's the latest in SalesGrow CRM and explore the new features and improvements.

Sales Force Automation	Track leads, prospects and close more deals in less time. Keep customer data organized for up-selling & cross-selling opportunities.	Marketing Automation	Effectively plan marketing activities, send mass emails and improve the quality of lead generation processes using web forms.
Inventory Management	Track the procurement and sale of goods or services and manage the pre-sales and post-sales activities in a single application.	Customer Support	Enable a better integration between Sales & Customer Support processes in a single system.
Reports & Dashboards	Generate various reports and use dashboards to visualize comparisons, patterns, and trends in sales, and marketing.	Activities	Organize and keep track of all the tasks, events, and calls. Also, set reminders and create recurring activities.
Document Library	Manage and easily share all your business related documents in the Documents tab within SalesGrow CRM.	SalesGrow CRM for Mobile	Get instant access to your CRM data anywhere, anytime, from your iPhone, iPad and Android phones.

Personal Settings	Define your personal settings such as language, date & time, signature, name format, currency, etc., as per your requirements.	Organization Settings	Add your company details, including set up fiscal year, business hours and personalize your company logo.
Users & Permissions	Define the security levels in your account by creating the roles, profiles, and groups for the users.	Customization	Apply page-level and field-level customizations, change tab settings and other company related details in your account.
Automation	Automate sales, marketing and support processes by creating workflow rules, alerts & tasks plus record assignment rules.	Templates	Create email templates, inventory templates and mail merge templates of your own.
Website Integration	Publish web forms online and set up auto response rules to send emails for the records generated via web forms.	Data Administration	Import your data into SalesGrow CRM, keep track of the import details and also export your data anytime.
Apps & Add-ons	Select from a wide range of add-ons and plug-ins that help you manage your business effectively.	Billing & Payments	Manage all your subscription and billing details; upgrade or downgrade your account anytime.

2. Getting Started
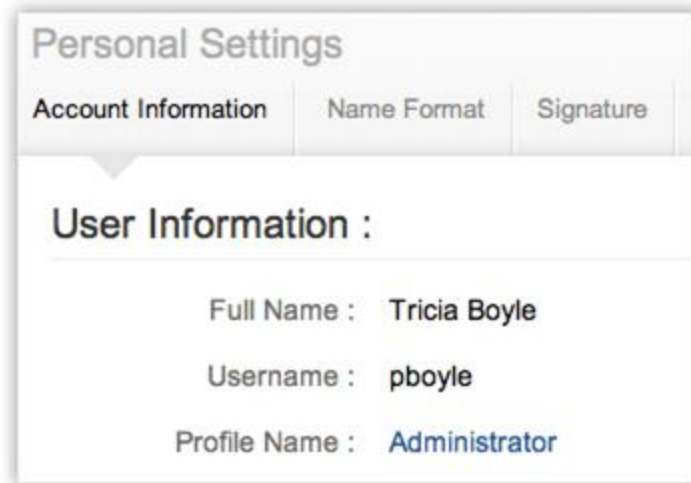
Here, you will be introduced to a number of useful functions and concepts that will help you start working with your CRM account. It will provide you with information required to complete the most essential tasks needed to get started and get the most of your SalesGrow CRM experience.

2.1 Account Setup

Start setting up your SalesGrow CRM account by adding your company details and personal information. Then you can create roles and profiles according to your organization's requirements and add users.

2.1.1 Personal Settings

First, personalize your CRM account by changing language and time zone. Also, add your personalized signature to be used for business emails sent via SalesGrow CRM.
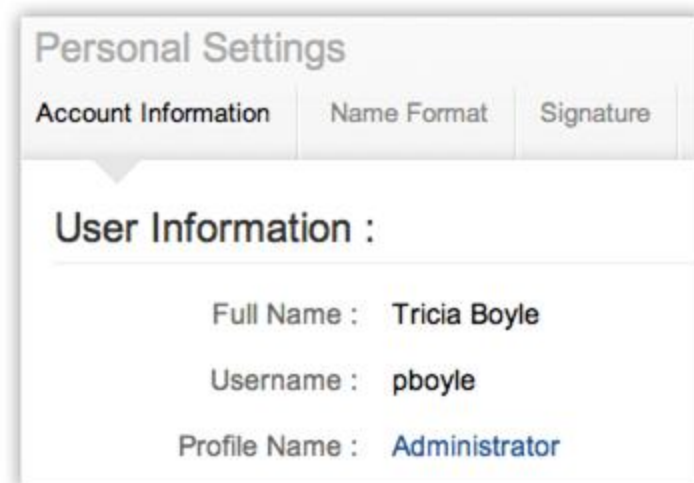
Personal Settings

Account Information   Name Format   Signature

User Information :

Full Name :   Tricia Boyle

Username :   pboyle

Profile Name :   Administrator

2.1.2   Company Details

Add your company details such as the company name for all your business communication, country locale, time zone and also the company logo. Note that the image file size should not exceed 20 KB and for best results, use an image with 190 (width) by 65 (height) pixel dimensions.

Personal Settings

Account Information   Name Format   Signature

User Information :

Full Name :   Tricia Boyle

Username :   pboyle

Profile Name :   Administrator

2.1.3   Users

Add users to your CRM account and assign them roles and profiles. Note that only after you add a user in your account, will you be able to add new profiles and roles. For the first user that you

add, the system defined role (CEO, Manager) and profile (Administrator, Standard) can be assigned.
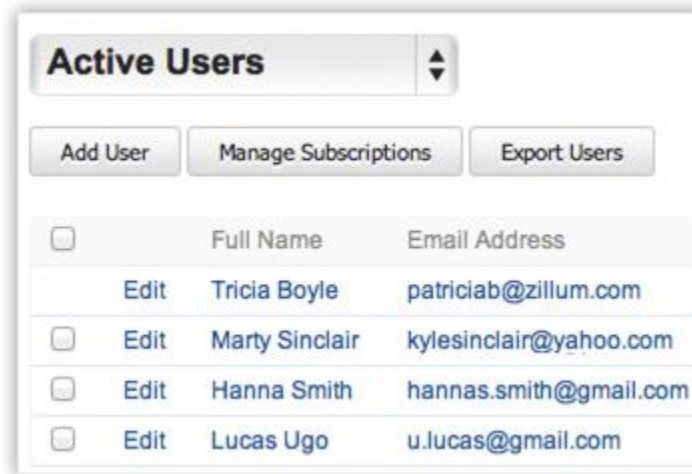
2.1.4 Profiles

Create profiles that define the access permissions to the various CRM modules and features.

2.1.5 Roles

Also, set up the organization-wide hierarchy by creating Roles and assigning it to users.
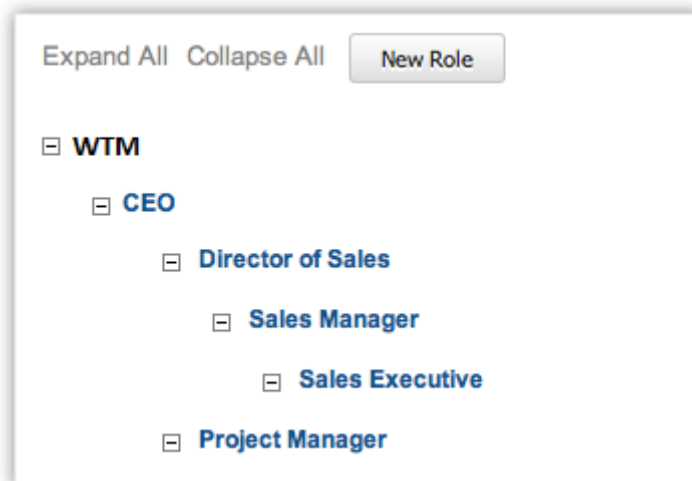
2.1.5 Fiscal Year

Set up the fiscal year for your company which is used for accounting purposes and preparing financial statements. The fiscal year may not be the same as the calendar year. Select the fiscal start month, then the fiscal quarters are automatically rolled up.

2.1.6 Business Hours

Various teams in your organization may work at different business hours and work in shifts based in different time zones. Define your business hours that will be helpful in assigning cases to individuals using the case escalations rules.

2.2 Product Customization

Next, customize your account based on your industry standards and business requirements. You can begin by customizing fields, page layouts, themes, tabs and list views.

2.2.1 Page Layout

Customize the Record Details page layout. You can add required fields or hide the unwanted fields, reorder the fields, create delete sections, mark fields as mandatory and change to 1 column or 2 column layout.
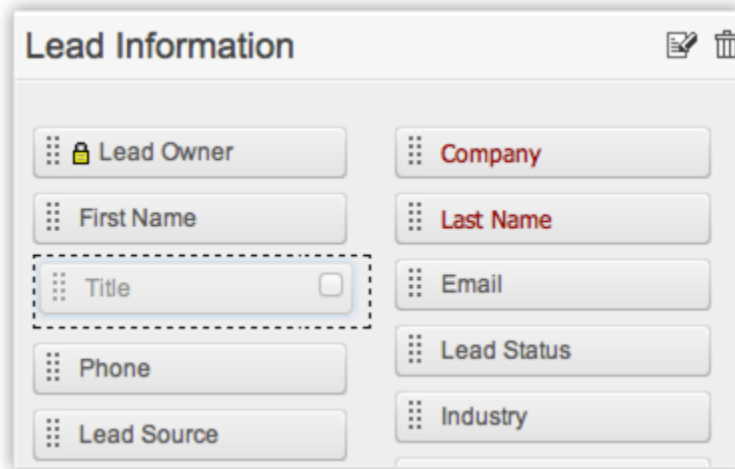
2.2.2 Organization Page Details

Change the order of the Related Lists such as the Attachments, Open Activities, Closed Activities, etc., for records in each module. Show or hide some of the related lists as per the organization's business requirements.

2.2.3 Show or Hide Tabs

Organize tabs in such a way that only the relevant tabs are visible for use and the unwanted tabs are hidden. You can also rename the tabs based on your business domain.
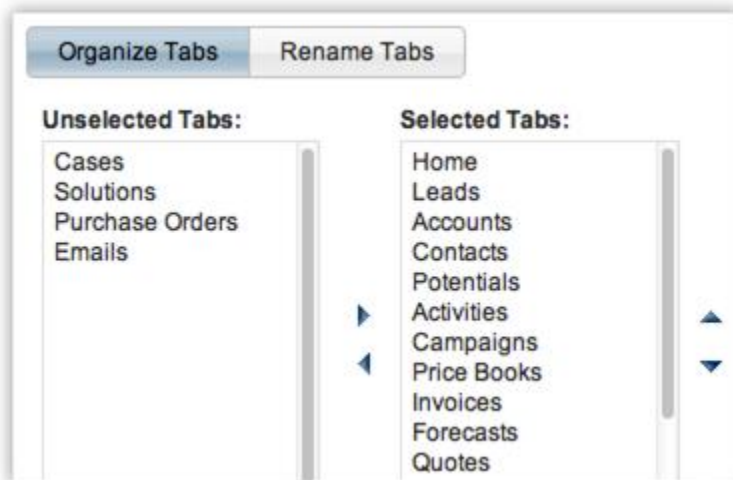
2.2.4 Create Fields

Add custom fields of various types such as text, lookup, pick list, currency, autonumber, check box, etc. Formula fields can be created to populate dynamically calculated data based on the values returned from other standard or custom fields.

2.2.5 Create List View

Create custom list views to filter records based on a given criteria. This will help you sort out the required records quickly and perform all the necessary operations on the records.
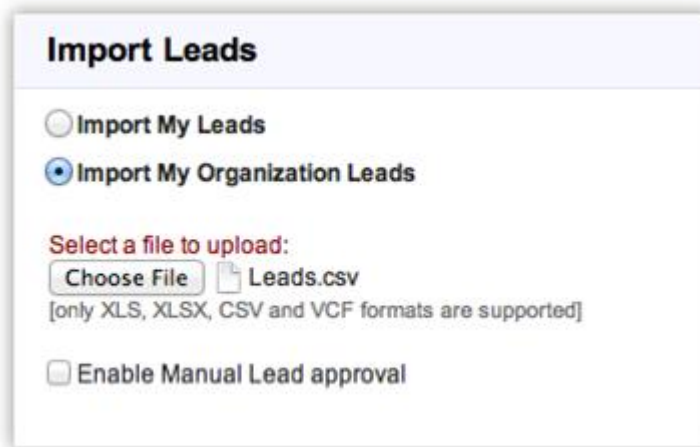
2.3 Common Operations

Take a quick glance into some of the common operations such as importing, exporting, navigating and searching records in SalesGrow CRM.

2.3.1 Import
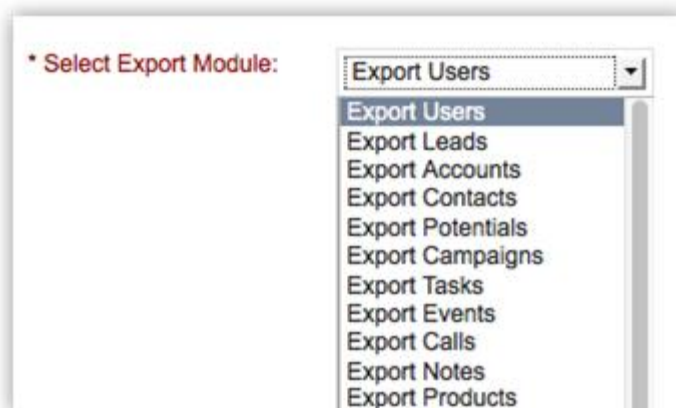
Import records in your CRM account from external sources, if you already have the data. You can either import records assigned to you or import records that are assigned to other users by using the *Import My Organization Records* option.

Import Leads

○ Import My Leads

● Import My Organization Leads

Select a file to upload:

[Choose File] 📄 Leads.csv

[only XLS, XLSX, CSV and VCF formats are supported]

☐ Enable Manual Lead approval

2.3.2 Export

Export data in CSV format from individual CRM modules in your CRM account. You can either manually export the records or request a data backup.

* Select Export Module: | Export Users ▾ |

Export Users
Export Leads
Export Accounts
Export Contacts
Export Potentials
Export Campaigns
Export Tasks
Export Events
Export Calls
Export Notes
Export Products

2.3.3 Search Records

Save time by using the search feature to locate specific information or specific records without having to go through the entire list of records. There are three search options: Search records Alphabetically, by Information or by Criteria.

2.3.4 Mass Actions

Perform mass operations such as the mass update, mass transfer, mass delete, mass email etc. for easy and quick management of records.
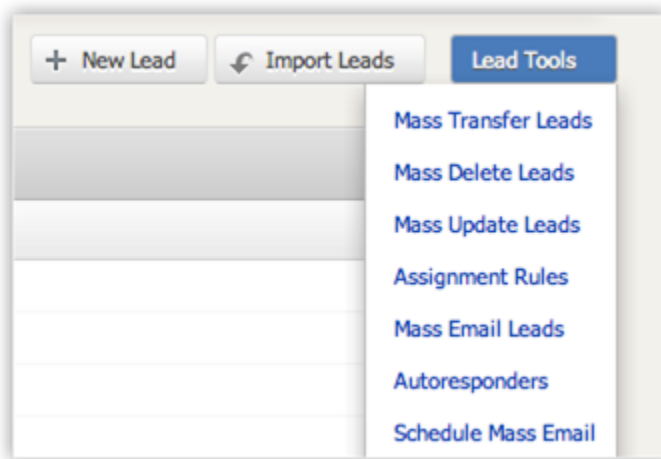
3. Sales Force Automation

SalesGrow CRM provides your sales force, executives, and management with sophisticated sales management functions such as: **lead generation & qualification**, sales pipeline analysis, sales stage & probability analysis, **competitor analysis**, real-time sales forecasting and other useful metrics. These functions give your business an opportunity to completely focus on **customer life-cycle** (lead generation - acquisition - conversion - retention - loyalty), thus increasing sales revenue.

SalesGrow CRM has sales force automation modules such as: Leads, Accounts, Contacts, Potentials, and Sales Forecasting. You can accurately track all business opportunities and **close more deals in less time**. In addition, you can identify bottlenecks in the sales processes, well in advance and effectively utilize existing customer data for future **cross-selling** and **up-selling** opportunities.

3.1 Leads

Leads are raw details about individuals or representatives of organizations collected from trade shows, seminars, advertisements and other marketing campaigns.

3.1.1 Create Leads

In SalesGrow CRM, you can create leads by:

- **Entering data in the lead details form:** You can manually fill in the Lead details gathered from various external sources, e.g. trade shows, exhibitions, colleagues, business cards, etc.
- **Importing leads from external sources**: You can gather data through various sources, e.g. purchasing a leads' database, leads from different business units, etc. and import the CSV and XLS files into SalesGrow CRM.
- **Capturing leads from website:** You can create web forms and allow website visitors to submit their contact details or questions directly through forms. These details submitted in the website are captured directly in the Leads module.

Note

- Some of the standard fields may not be visible or editable depending on your organization's business process.
- In case you want to add or modify fields or would like to know more details on the usage of fields, please contact your System Administrator.

Create Leads Individually

You can create leads manually by entering the details in the lead page. For instance: While traveling you met a person who showed some interest in your product or service. You exchanged business cards and assured them you would contact him or her again with more details about the product/service. The next day, you create a lead manually with the available details and contact the person. In such cases, it is easy to manually enter in the available details and create a lead record instantly.

You can create leads individually by using the following:

- Filling in the details in the lead creation form.
- Cloning the lead with a few changes in the existing record.

Note

- By default, the person who creates the lead owns it.
- To change owner, click the **Change** link in the **Lead Owner** field from the *Lead Details* page and select another user.

To create leads individually

1. In the **Leads** module, click **New Lead**.
2. In the *Create Lead* page, enter the lead details.
3. Click **Save**.

To clone leads

17

1. In the **Leads** tab, click a particular lead that is to be cloned.
2. In the *Lead Details* page, click **Clone**.
3. In the *Clone Lead* page, modify the required details.
4. Click **Save**.

Qualify Leads

After collecting the lead details in your CRM account, the next stage is lead qualification. With further negotiations or follow up, the lead can be qualified into a business opportunity. In this stage the focus is on evaluating leads based on their interest and readiness to be promoted to sales.
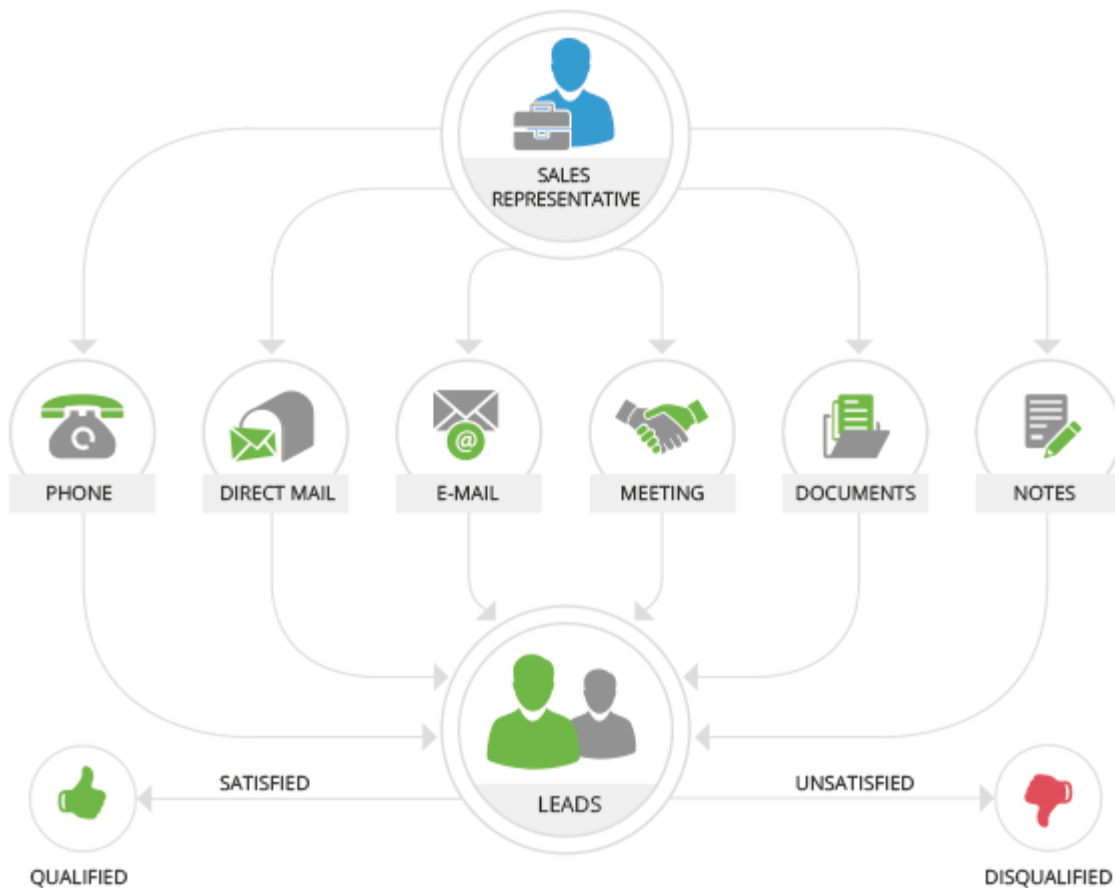
Following are some of the methods for leads qualification:

- **Phone Call:** A direct and quick follow up method after the lead generation to initiate further discussion on the sales process.
- **Direct Mail:** A traditional approach of delivering materials such as advertising circulars, brochures, catalogs and other commercial materials through postal mail.
- **Email:** Send email communications to enhance business relationships if the email addresses are captured during the lead generation process. This enables a quicker method to send specific or mass mailings to qualifying leads.

- **Meeting:** A one-to-one personal meeting or a scheduled online meeting provides a good approach for further development towards the next stage.
- **Documents:** The process of exchanging documents to understand the prospective business, enabling clarity of expectation and understanding to provide business solutions.
- **Notes:** Notes in the form of remarks or comments included during the follow up sessions that act as a record of the previous follow ups during the qualifying stage.

3.1.2 Associate Lead

Associate Leads with Other Records

As qualification of leads is the focus, associating various records with the leads is the next step. You may need to associate leads with other records, until the lead reaches a certain stage where it can be converted to **Potential** as per your organization's sales process.

In the *Lead Details* page, you can associate the following:

- **Open Activities:** To add tasks and events (meetings and calls).
- **Closed Activities:** To archive the closed activities.
- **Attachments & Notes:** To attach documents and notes.
- **Mails:** To send e-mail messages to the selected lead.
- **Campaigns:** To associate many campaigns to a single lead.
- **Social Interactions** - To view the Twitter and Facebook interactions associated to the lead and send messages, like posts, retweet, etc.

3.1.3 Converting Lead

Convert Leads to Other Sales Records

When there is a chance of further negotiations with a lead, it can be converted into an account, contact, and potential. In short, once the lead status has reached a certain stage, it can be qualified as a potential. On conversion, all the lead details are transferred in creating an account, contact, and potential. You can map the lead fields with those of the account, contact and potential so that the

details are transferred to the appropriate fields.

Note

- Once a lead is converted into a potential, lead status will be changed to **Converted** in *Leads Home* page.
- You can view the list of converted leads by selecting the *Converted Leads* list view.
- When a lead is converted, it cannot be reverted to a lead.
- An account will be created on lead conversion if the Company Name detail is available for the lead.

Availability

 Profile Permission Required: Users with the Convert Leads permission in profile can access this feature.

Check Feature Availability and Limits

While converting a lead to a potential first a new account and contact are created with the relevant lead data, and then a new potential is created. The following table provides description

of the various fields converted to an account, contact, and potential during lead conversion. In case of custom fields, you can map them too.

Lead Field	Converted To
Salutation	Contact: Salutation
First Name	Contact Name
Last Name	Contact Name
Company	Account: Name
Designation	Contact: Title
Lead Source	Potential: Lead Source Contact: Lead Source
Industry	Account: Industry
Annual Revenue	Account: Annual Revenue
Assigned To	Account, Contact, Potential: Assigned To
Phone	Account: Phone Contact: Phone
Mobile	Contact: Mobile
Fax	Account: Fax Contact: Fax
Email	Contact: Email
Skype ID	Contact: Skype ID
Web site	Account: Web site
Lead Status	User should specify the Potential Stage while converting the lead.
Rating	Potential: Rating
No of Employees	Account: No. of Employees
Email Opt Out	Contact: Email Opt Out
Street	Account: Street Contact: Street
City	Account: City Contact: City
State	Account: State Contact: State
Postal Code	Account: Postal Code Contact: Postal Code
Country	Account: Country Contact: Country
Custom Fields	Users can map their own custom field.

To convert leads to other sales records

1. Click the **Leads** tab.
2. In the *Leads Home* page, select the lead to be converted.

3. In the *Lead Details* page, click **Convert**.
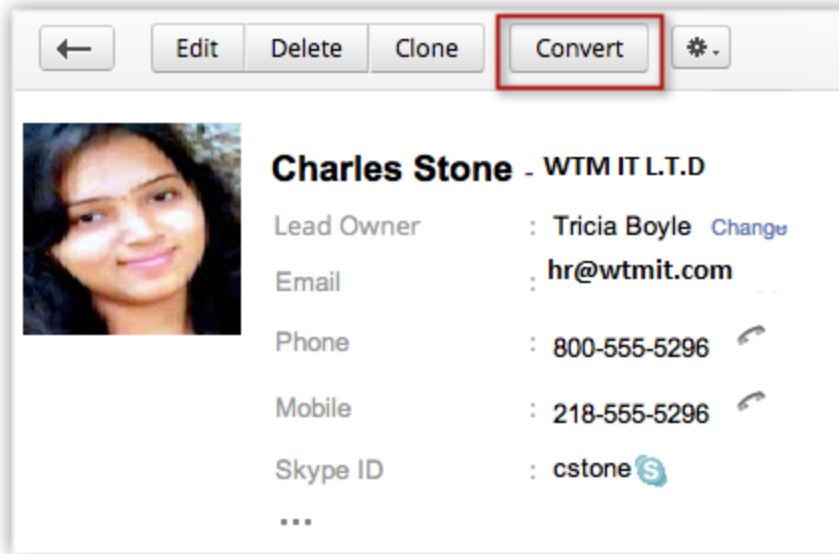
4. In the *Lead Conversion* page, choose the appropriate account/contact option.
   The options to create an account/contact or add to the existing account/contact will be available based different use cases.
5. Select **Create a new Potential for this Account/Contact** check box if you want a potential upon lead conversion.
   All the mandatory fields for the Potentials module will be listed.
   o Specify the **Potential Name**.
     By default, the *Company Name* will be populated as the potential name.
   o Specify the **Potential Closing Date** or select the date from the calendar displayed.
   o Select the **Potential Stage** from the drop-down list.
   o Select the **Contact Role** from the drop-down list.
   o Enter the **Amount**.
   o Choose the **Campaign Source** from the lookup.
     Note that only the campaigns associated to the lead will be listed. You can associate one campaign which qualified the lead. This details for this campaign source will be available in the potential.
   o Select the **Owner of the record**.
     This option will be available only if a new record is created.
6. Click **Convert**.

Note

- All the mandatory fields available for the Potentials module will be listed during lead conversion.
- When the Email Address Duplication Check is enabled, you will not be able to convert a lead, if the following conditions are true.
  o Lead is assigned to a User A and User B tries to convert it.
  o User B is a subordinate to User A in the organization's hierarchy.
  o There are duplicated available for the record.

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Scenarios - Convert Leads

Here is an example that will help you understand the different scenarios. Let us take for example a lead with the following details:

- **Lead Name** - Charles Stone
- **Company Name** - WTM.
- **Email Address** – WTM@gmail.com

Various scenarios	If Account/Contact already exists in CRM	If Account/Contact does not exists in CRM

Lead Name: Available
 	
Company: Available
 	
Email Address: Available
	Use Case 1
	If the email address matches with an existing contact then:
	
	1. Add to existing contact
	2. Create a new contact
	    o On selecting this option an account will also be created.
	
	Use Case 2:
	
	If there is no contact with the matching email address, the system will search for accounts with a matching company name. If the company name matches an existing account, then:
	
	1. Add to existing account
	2. Create a new account
	    o On selecting this option a contact will also be created.
	
	Use Case 3:
	
	If Case 2 is not satisfied and there is no account with the matching company name, the system will search for contacts with a matching lead name. If the lead name matches an existing contact, then:
	
	1. Add to existing contact
	2. Create a new contact
	    o On selecting this option an account will also be created.
		A new account and a new contact will be created.

Lead Name: Available Company: Not Available Email Address: Not Available	Options: 1. Add to existing contact The existing details in the contact will not be changed/overwritten. 2. Create a new contact	A new contact will be created

Lead Name: Available Company: Available Email Address: Not Available	Options: 1. Add to existing account
	  o If the lead name matches with an existing contact in CRM, then you will have the option to add to the existing contact or create one.
	  o If the lead name does not match with any existing contact in CRM, then a contact will be created and associated to the account. 2. Create a new account
	  o A contact will be created and associated to the account.
		A new account and a new contact will be created. The contact will be associated to the account.

Lead Name: Available Company: Not Available Email Address: Available	Options: 1. Add to existing contact
	  o If the email address matches with an existing contact in CRM, then you will have the option to add it to that existing contact.
	  o If there is no contact with the matching email address, the system will search for contacts with a matching lead name. If it matches with any existing contact in CRM, then you will have the option to add it to that existing contact. 2. Create a new contact
	  o A contact will be created and associated to the account.
		A new contact will be created

Map Custom Fields

When a lead is converted into an account, contact and potential, field values of a lead are transferred to the mapped account, contact, and potential fields. Only when the fields are accurately mapped with those of the corresponding modules, will data be transferred properly.

By default, the standard fields are mapped with the corresponding fields of the other modules (Accounts, Contacts, and Potentials). With the lead conversion mapping tool, you can easily map other fields that you create. Please note that you need to map a field with a similar type of field only. For example, a Text field should be mapped only with a Text field, a Picklist field with a similar type of Picklist field.

To map lead fields with other modules

1. Click **Setup** > **Customization > Fields > Leads > Map Fields**.
2. In the *Map Fields for Leads Conversion* page, the fields are listed under **Lead Fields** column.

Mapping Information

* Custom Field

Lead Field	Account Field	Contact Field	Potential Field
City:	Billing City	Mailing City	-None-
Country:	Billing Country	Mailing Country	-None-
Description:	Description	Description	Description
Title:	-None-	Title	-None-
Email:	-None-	Email	-None-
Email Opt Out:	-None-	Email Opt Out	-None-
Industry:	Industry	-None-	-None-
Lead Source:	-None-	Lead Source	Lead Source
Mobile:	-None-	Mobile	-None-
Phone:	Phone	Phone	-None-

3. Map the lead fields to the corresponding fields of Accounts, Contacts and Potentials.
4. Click **Save**.

Close Leads Without Converting

Based on your business requirements, you may want to close the leads instead of converting them. In such a case, you can do the following:

1. Add a custom value (Closed) for the Lead Status field.

2. Change the *Lead Status* to **Closed**.
3. Create a List View to filter all the leads that are closed.

By default, some industry standard pick list values are available in the *Lead Status* field. You can modify the pick list values as per your organization's business process and replace the existing value with new value.

To add a pick list value

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Field**.
3. Select **Leads** module from the drop-down list and click the **Edit** link for the *Lead Status* pick list field.
4. In the *Edit Pick List* page, click **Add New Values**.

5. In the *Add New Value* box, specify **Closed**.
6. Click **Add**.
7. Click **Save**.

3.1.4 Approving Records

The import feature and Web forms have an option to enable manual approval of records. When this option is enabled, records imported or gathered through web forms are not added directly to the modules. They need to be approved first for other users to access the records. Records can be approved for the **Leads**, **Contacts**, **Cases** or **any other Custom module's** records.

Availability

Profile Permission Required: Users with the Approve Records permission can access this feature.

Check Feature Availability and Limits

To approve records

1. Click the **Leads** Tab.
2. In the *[Module] Home* page, under *[Module] Tools* section, click the **Approve [Module]** link.
3. In the *[Module] Approval* page, select the records for approval.
4. Click **Approve**.

3.1.5 Standard Fields

Standard Fields in Leads

Following are the list of SalesGrow defined standard fields available in the Leads module:

Field Name	Description	Data type	Maximum Limit
Lead Owner	Select the SalesGrow CRM user to whom the Lead is assigned.	Lookup	-
Salutation	Select the salutation from the drop-down list.	Pick list	-
First Name	Specify the first name of the lead.	Text box	Alphanumeric(40)
Title	Specify the job position of the lead	Text box	Alphanumeric(100)
Last Name*	Specify the last name of the lead. This field is a mandatory.	Text box	Alphanumeric(80)
Company*	Specify the name of the company where the lead is working. This field is a mandatory.	Text box	Alphanumeric(100)
Lead Source	Select the source of the lead, that is, from where the lead is generated.	Pick list	-
Industry	Select the industry to which the lead belongs.	Pick list	-
Annual Revenue	Specify the annual revenue of the company where the lead is working.	Currency	Decimal (16)
Phone	Specify the phone number of the lead.	Text box	Alphanumeric(30)
Mobile	Specify the mobile number of the lead.	Text box	Alphanumeric(30)

27

Fax	Specify the fax number of the lead.	Text box	Alphanumeric(30)
Email	Specify the email address of the lead.	Email	Alphanumeric and Special characters(100)
Secondary Email	Specify another email address of the lead.	Email	Alphanumeric and Special characters(100)
Skype ID	Specify the Skype ID of the lead. Currently skype ID can be in the range of 6 to 32 characters.	Text box	Alphanumeric(50)
Web site	Specify the Web site of the lead.	URL	Alphanumeric(120)
Lead Status	Select the status of the lead from the drop-down list.	Pick list	-
Rating	Select the rating of the lead from the drop-down list.	Pick list	-
No. of Employees	Specify the number of employees in lead's company.	Numeric	Integer (16)
Email Opt-out	Select the check-box to remove leads from your mailing list so that they will not receive any emails from your SalesGrow CRM account	Check box	-
Created By	Displays name of the user created the Lead first time.	Date/Time	-
Modified By	Displays name of the user modified the Lead.	Date/Time	
Street	Specify the street address of the lead.	Text box	Alphanumeric(250)
City	Specify the name of the city where the lead lives.	Text box	Alphanumeric(30)
State	Specify the name of the state where the lead lives.	Text box	Alphanumeric(30)
Zip Code	Specify the postal code of the lead's address.	Numeric	Alphanumeric(30)
Country	Specify the name of the lead's country.	Text box	Alphanumeric(30)
Description	Specify any other details about the lead.	Text area (long text)	32000 characters

3.2 Accounts

Leads are raw details about individuals or representatives of organizations collected from trade shows, seminars, advertisements and other marketing campaigns.

3.2.1 Create Accounts

Accounts are companies or departments with which you plan or have business dealings.

In SalesGrow CRM, you can create accounts by:

- **Entering data in the account details form**: You can manually fill in the Account details gathered from various external sources.
- **Importing leads from external source:** You can gather data through various sources and import the CSV and XLS files into SalesGrow CRM.

- **Converting lead to account**: On lead conversion, contacts, accounts and potentials can be created.

Note

- Some of the standard fields may not be visible or editable depending on your organization's business process.
- In case you want to add or modify fields or would like to know more details on the usage of fields, please contact your System Administrator

Create Accounts Individually

You can create accounts individually by:

- Filling in the details on the account creation form.
- Cloning the accounts with a few changes in the existing account details.

Availability

Profile Permission Required: Access to the Accounts Tab with the Create permission enabled.

Check Feature Availability and Limits

To create accounts individually

1. In the **Accounts** module, click **New Account**.
2. In the *Create Account* page, enter the account details.
3. Click **Save**.

To clone accounts

1. In the **Accounts** tab, click a particular account that is to be cloned.
2. In the *Account Details* page, click **Clone**.
3. In the *Clone Account* page, modify the required details.
4. Click **Save**.

3.2.2 Associate Accounts

Associate Account with Other Records

You can create a 360 degree view of the account to display all the associated details, such as contacts, potentials, trouble tickets, activities, attachments, and notes in a single view.

In the *Account Details* page, you can update the following:

- **Potentials**: To add potentials.
- **Contacts**: To add contacts.
- **Open Activities**: To add tasks and events (meetings and calls).
- **Closed Activities:** To display the closed activities.
- **Products**: To add products.
- **Quotes**: To add quotes.
- **Sales Orders**: To add sales orders.
- **Invoices**: To add invoices.
- **Attachments & Notes**: To attach documents and notes.
- **Member Accounts**: To add other divisions or subsidiaries to the parent account.
- **Cases**: To create cases

3.2.3 Member Accounts

Add Member Accounts

Member Accounts are secondary accounts added to an existing parent account. This allows having separate accounts with different divisions within a parent company and provides a full view of the individual accounts as well as the consolidated accounts within the parent account.

To add member accounts

1. In the *Account Details* page, the existing member account details, if any, are displayed.
   - Click **Account Name**, **Phone**, **Website**, **Account Type**, **Industry**, or **Annual Revenue** links to sort the display order of the records.
   - Click the relevant **Edit** or **Del** link to modify or delete the member account respectively.
2. Click **New**.
3. Enter the member account details.
4. Click **Save**.

3.2.3 Standard Fields

Standard Fields in Accounts

Following are the list of SalesGrow defined standard fields available in the Accounts module:

Field Name	Description	Data type	Maximum Limit
Account Name	Specify the company	Text box	Alphanumeric(100)

	name. This field is mandatory.		
Account Owner	Select the name of the user to whom the account is assigned.	Look up	-
Website	Specify the URL of the company's Web site.	URL	Alphanumeric(30)
Ticker Symbol	Specify the ticker symbol of the Company.	Text box	Alphanumeric(30)
Parent Account	Select the parent company name from the Change pop-up dialog.	Lookup	
Employees	Specify the number of employees in account's company.	Numeric	Integers(10)
Ownership	Specify the type of ownership of the company.	Picklist	
Industry	Select the type of industry from the drop-down list.	Pick list	-
Account Type	Select the type of account from the drop-down list.	Pick list	-
Account Number	Specify the reference number for account. Up to 40 characters are allowed in this field.	Numeric	Number
Account Site	Specify the name of the account's location, for example, Headquarters or London. Up to 80 characters are allowed in this field.	Text box	Alphanumeric(30)
Phone	Specify phone number of the account.	Text box	Alphanumeric(30)
Fax	Specify fax number of the account.	Text box	Alphanumeric(30)
E-mail	Specify the official E-mail address of the account.	E-mail	Alphanumeric and Special characters(100)
Rating	Specify the rating of the account.	Pick list	-

SIC Code	Specify the Standard Industrial Classification code of the account.	Text box	Integers(10)
Created By	Displays name of the user created the Account first time.	Date/Time	-
Modified By	Displays name of the user modified the Account.	Date/Time	
Annual Revenue	Specify the annual revenue of the account.	Numeric	Integers(10)
Billing Address • Street • City • State • Code • Country	Specify the billing address of the account to send the quotes, invoices, and other agreements.	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country- Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Shipping Address • Street • City • State • Code • Country	Specify the shipping address of the account to deliver the shipment.	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Description	Specify any other details about the account.	Text area (long text)	32000 characters

3.3 Contacts

Contacts are people in an organization with whom you communicate in pursuit of a business opportunity.

3.3.1 Create Contacts

In SalesGrow CRM, you can create contacts by:

- **Entering data in the contact details form:** You can manually fill in the Contact details gathered from various external sources.
- **Importing contacts from external source:** You can gather data through various sources, e.g. purchasing contacts database, contacts from different business units, etc. and import the CSV and XLS files into SalesGrow CRM.
- **Capturing contacts from website**: You can create web forms and allow website visitors to submit their contact details or questions directly through forms. These details submitted in the website are captured directly into the Contacts module.
- **Converting lead to contact:** On lead conversion, contacts, accounts and potentials can be created.
- **Synchronizing Microsoft Outlook contacts:** You can synchronize the contacts in Microsoft Outlook with the contacts in SalesGrow CRM.

Note

- Some of the standard fields may not be visible or editable depending on your organization business process.
- In case you want to add or modify fields or would like to know more details on the usage of fields, please contact your System Administrator.

Create Contact Individually

You can create contacts individually by:

- Filling in the details in the contact creation form.
- Cloning the contacts with a few changes in the existing contact details.

To create contacts individually

1. In the **Contacts** module, click **New Contact**.
2. In the *Create Contact* page, enter the contact details
3. Click **Save**.

Note

- By default, the person who creates the contact owns it.
- To change owner, click the **Change** link in the **Contact Owner** field from the *Contact Details* page and select another user.
- While selecting the Account from the Lookup field's pop window, there is also an option to create an Account.
  You can use this option to quickly create an account by providing some mandatory information. You have two options:
  - ○ Click **Save**. The record will be saved and it will be listed with the other accounts. You can select it to associate to the contact that you were creating.

- o Click **Save & Associate** to save the new record and also associate it to the contact that you were creating.

To clone contacts

1. In the **Contacts** tab, click a particular contact that you want to be cloned.
2. In the *Contact Details* page, click **Clone**.
3. In the *Clone Contact* page, modify the required details.
4. Click **Save**.

3.3.2 Associate Contacts

Associate Contact with other Records

You can create a 360-degree view of the contact to display all the associated details, such as potentials, trouble tickets, open activities, history of the completed activities, attachments, and notes.

In the *Contact Details* page, you can update the following:

- **Member Accounts:** To add other divisions or subsidiaries to the parent account
- **Open Activities:** To add tasks and events
- **Closed Activities:** To display all the closed tasks and events
- **Cases:** To create cases for the contact
- **Products:** To add products for the contact
- **Attachments:** To attach documents and notes
- **Notes:** To attach notes to the contact.
- **Potentials:** To add potentials to the account
- **Contacts:** To add contacts to the account
- **Sales Orders:** To add sales orders to the account
- **Invoices:** To add invoices to the account
- **Quotes:** To add quotes
- **Campaigns:** To associate many campaigns to a single contact
- **Social Interactions** - To view the Twitter and Facebook interactions associated to the contact and send messages, like posts, retweet, etc.

3.2.3 Approve Contacts

Approving Records

The import feature and Web forms have an option to enable manual approval of records. When this option is enabled, records imported or gathered through web forms are not added directly to the modules. They need to be approved first for other users to access the records. Records can be approved for the **Leads**, **Contacts**, **Cases** or **any other Custom module's** records.

Profile Permission Required: Users with the Approve Records permission can access this feature.

Check Feature Availability and Limits

To approve records

1. Click the **Leads** Tab.
2. In the *[Module] Home* page, under *[Module] Tools* section, click the **Approve [Module]** link.
3. In the *[Module] Approval* page, select the records for approval.
4. Click **Approve**.

3.2.4 Standard Fields

Standard Fields in Contacts

Following are the list of SalesGrow defined standard fields available in the Contacts module:

Field Name	Description	Data type	Maximum Limit
Contact Owner	Select the SalesGrow CRM user to whom the account is assigned.	Lookup	-
Salutation	Select the Salutation of the contact, such as Mr., Ms, Mrs., or others.	Pick list	
First Name	Specify the first name of the contact.	Text box	Alphanumeric(40)
Last Name*	Specify the last name of the contact. This field is mandatory.	Text box	Alphanumeric(40)
Account Name	Select the account related to the contact.	Lookup	-
Vendor Name	Select the vendor related to the contact	Lookup	-
Campaign Source	Select the Campaign related to the contact	Lookup	-
Lead Source	Select the source from	Pick list	-

	which the contact is created.		
Title	Specify the job position of the contact.	Text box	Alphanumeric(50)
Department	Specify the department of the contact.	Text box	Alphanumeric(30)
Date of Birth	Specify the birthday of the contact to send greetings for a better relationship.	Date	-
Reports To	Select the person to whom the contact reports	Text area	255 characters
Created By	Displays name of the user created the contact first time.	Date/Time	-
Modified By	Displays name of the user modified the contact	Date/Time	
Email Opt Out	Select the check-box to remove contacts from your mailing list so that they will not receive any emails from your SalesGrow CRM account	Check box	-
Skype Id	Specify the Skype ID of the contact. Currently skype ID can be in the range of 6 to 32 characters.	Text box	Alphanumeric(50)
Phone	Specify the office phone number of the contact.	Text box	Alphanumeric(50)
Mobile	Specify the mobile number of the contact.	Text box	Alphanumeric(50)
Home Phone	Specify the home phone number of the contact.	Text box	Alphanumeric(50)
Other Phone	Specify the other phone number of the contact (if any).	Text box	Alphanumeric(50)
Fax	Specify the Fax number of the contact.	Text box	Alphanumeric(50)
Email	Specify the primary email address of the contact.	Email	Alphanumeric(100)
Secondary Email	Specify another email	Email	Alphanumeric(100)

	address of the contact.		
Assistant	Specify the name of the contact's assistant.		
Asst Phone	Specify the phone number of the contact's assistant.	Text box	Alphanumeric(100)
Mailing Address • Street • City • State • Zip • Country	Specify the primary address of the contact.	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country- Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Other Address • Street • City • State • Zip • Country	Specify the other address of the contact (if any).	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Description	Specify any other details about contact.	Text area (long text)	32000 characters

3.4 Opportunities

Potentials are business deals with companies or people that generate real revenue for your organization.

3.4.1 Create Potential

In SalesGrow CRM, you can create potentials by:

- **Entering data in the potential details form**: You can manually fill in the Potential details gathered from various external sources.
- **Importing potentials from external sources**: You can gather data through various sources and import the CSV and XLS files into SalesGrow CRM.

- **Converting lead to potential**: On lead conversion, contacts, accounts and potentials can be created.

Note

- Some of the standard fields may not be visible or editable depending on your organization business process and field-level security settings.
- In case you want to add or modify fields or would like to know more details on the usage of fields, please contact your System Administrator.

Create Potentials Individually

You can create potentials individually by:

- Filling in the details in the potential creation form.
- Cloning the potential with a few changes from the existing potential details

To create potentials individually

1. In the **Potentials** module, click **New Potential**.
2. In the *Create Potential* page, enter the potential details.
3. Click **Save**.

Note

- While selecting the Account or Contacts from the Lookup field's pop-up window, there is also an option to create an Account or Contact.
  You can use this option to quickly create an account or contact by providing some mandatory information. You have two options:
  o Click **Save**. The record will be saved and it will be listed with the other accounts or contacts. You can select it to associate to the potential that you were creating.
  o Click **Save** & **Associate** to save the new record and also associate it to the potential that you were creating.

To clone potentials

1. In the **Potentials** tab, click a particular potential that is to be cloned.
2. In the *Potential Details* page, click **Clone**.
3. In the *Clone Potential* page, modify the required details.
4. Click **Save**.

Associate Potentials with Other Records

You can create a 360-degrees view of the potential to display all the associated details, such as open activities, history of the completed activities, contacts, products, sales stage history, attachments, and notes.

In the *Potential Details* page, you can update the following:

- **Sales Stage History:** To view the history of the sales stage
- **Competitors:** To associate competitors
- **Attachments:** To attach documents
- **Notes:** To add notes
- **Open Activities:** To create tasks and events
- **Closed Activities:** To display the completed tasks and events
- **Products:** To add products
- **Quotes:** To create quote for the potentials
- **Sales Orders:** To create sales orders for the potential
- **Contact Roles** : To select contacts associated
- **Emails:** To send emails to the primary contact of potential
- **Cases:** To create cases

3.4.2 Associate Potential

Associate Competitors with Potential

Most companies prefer to purchase products after analyzing different vendors. If you are working within a highly competitive market, where your competitors are directly competing with you in being awarded the deal, it is always better to know their strengths and weaknesses well in advance so that you can propose your offering in a better way.

This feature enables you to add the competitor's strengths and weaknesses.

To associate competitors with potential

1. Click the **Potentials** tab.
2. In the *Potentials Home* page, select the required potential.
3. In the *Potential Details* page, the competitor details, if any, are displayed.
    - Click **Competitor Name** , **Website** , **Strengths** , or **Weaknesses** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the record respectively.
4. Click **New** and do the following:
    - Enter the **Competitor Name**.
    - Enter the competitor's **Website**.
    - Enter the **Strengths** and **Weaknesses** in the respective text boxes.
5. Click **Save**.

Map Contact Roles

While prospecting, you may need to contact different people (contacts) to finalize the sales deal. It is always better to know the contact's role in your prospecting organization, so that you always have the correct discussion with the right person. For example, explaining about product price and discounts is always better with the Financial Manager, whereas explaining product features is better with the

Product Manager. This kind of approach helps you to negotiate with the prospecting organization in a better way and minimize the sales lead-time.

To map contact roles

1. Click the **Potentials** tab.
2. In the *Potentials Home* page, select the required potential.
3. In the *Potential Details* page, the contact details, if any, are displayed.
   - Click **Contact Name** , **Phone** , **Email** , or **Role Name** links to sort the display order of the records.
   - Click the relevant **Del** link to delete the record.
4. Click **Add Contact Role**.
5. In the *Contact Roles Mapping* page, for each contact select the role from the **Contact Role** drop-down list.
6. Select the check box(es) of the contacts that you want to add.
7. Click **Save**.

Customize Contact Roles

While prospecting, there is a need to contact different people (contacts) to close the sales deal. Contact Roles helps in knowing the role of the contact in the prospecting organization and then having the correct discussion with the right person. For instance, explaining details about the product price and discounts is always better with the Financial Manager where as product features should be discussed with the Product Manager.

By default, some of the contact roles such as, Decision Maker, Product Management, Purchasing and other roles are available. However, the contact roles can be customized according to specific business processes.

Availability

Profile Permission Required: Users with the Field-level Access permission in profile can access this feature.

Check Feature Availability and Limits

To customize contact roles values

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Fields** > **Potentials** > **Contact Roles.**
3. In the *Edit Contact Roles* page, do the following:

o   Click **Add Role** or **Delete Role** links, if needed.

Edit Contact Roles

✛ Add Role | ✖ Delete Role

	Contact Roles
☐	Developer/Evaluator
☐	Decision Maker
☐	Purchasing
☐	Executive Sponsor
☐	Engineering Lead
☐	Economic Decision Maker
☐	Product Management

[Save] [Cancel]

o   Modify the existing roles from the **Contact Role** text box.
4. Click **Save** after updating the contact roles.

To add contact roles in potentials

1. Click the **Potentials** tab.
2. In the *Potentials Home* page, select the required potential.
3. In the *Potential Details* page under *Contact Roles* section, the list of contacts associated with potential are displayed. Click **Add Contact Roles** link.

Contact Roles

	Contact Name	Account Name	Phone	Email	Role Name
Del	John Cook	ACME Corp	800-555-0944	john.cook@acme.com	Decision Maker

Add Contact Roles   Edit All

4. In the *Contact Roles Mapping* page, for each contact select the role from the **Contact Role** drop-down list.
5. Click **Save** after associating roles to all the contacts.

3.4.3 Big Deal Alert

Set up Big Deal Alert

You can use the Big-deal Alert to notify your management or colleagues about a chance of being awarded a big deal that you would like to share with them. Sometimes, executive board members may be interested in knowing all of the Big-deal information well in advance. You can send the Big-deal alert

as an e-mail notification to all the SalesGrow CRM users or to the selected users and colleagues not registered as SalesGrow CRM users. By default, there is a Big Deal Alert in SalesGrow CRM that you can modify and use.

To configure big deal alert

1. Click **Setup** > **Automation** > **Workflow Rules**.
2. In the Workflow Rules page, select **Potentials** from the **List of Rules** drop-down list.
3. Click **Big Deal Rule** from the list of rules.
4. In the **Rule Details** page, the default criteria is " **Amount >= 1000 and the probability = 100** ".
5. Click **Edit** to modify the **Rule Details**.
6. Under **Actions** > **Instant Actions** the *Related Alerts*, Tasks and Field Updates are listed.
   You can change them as per your requirements.
7. Click **Save**.

Configure Sales Stage Picklist

To add or modify pick list value

1. Click **Setup** > **Customization** > **Fields** > **Potentials**.
2. From the list of potential fields, click the **Edit** link corresponding to the **Stage** field.
3. Modify the existing details, and then click **Save**.

3.4.3 Standard Fields

Standard Fields in Opportunities

Following are the list of SalesGrow defined standard fields available in the Opportunities module:

Field Name	Description	Data type	Maximum Limit
Potential Owner	Select the name of the user to whom the potential is assigned.	Lookup	
Potential Name*	Specify name of the potential. This field is mandatory.	Text box	Alphanumeric(120)
Account Name*	Select name of the account to which potential has to be created. This field is mandatory.	Lookup	-
Type	Select the type of potential (New Business or Existing Business) from the drop-down list.	Pick list	-
Lead Source	Select the lead source from the drop-down list	Pick list	-
Campaign Source	Select the campaign related to the contact.	Lookup	-
Contact Name	Select the contact related to the Potential.	Lookup	
Amount	Specify the amount that can be expected after	Currency	

	closing the potential.		
Closing Date*	Specify or select the expected close date. This field is mandatory.	Date format	-
Next Step	Specify the next step of the sales process.	Text box	Alphanumeric(100)
Stage*	Select the sales stage from the drop-down list. This field is mandatory.	Pick list	-
Probability	Specify the probability of closing an potential.	Number	
Expected Revenue	Calculated based on the Amount and potential Stage that you specify	Currency	
Created By	Displays name of the user created the potential first time.	Date/Time	-
Modified By	Displays name of the user modified the potential	Date/Time	
Description	Specify any other details about potential.	Text area (long text)	32000 characters

3.5 Forecasting

Forecasts are factual insight for fine-tuning the sales process in your organization.

3.5.1 Forecast Based on Role Hierarchy

Roles provide access permissions for the records in SalesGrow CRM. Based on the role hierarchy, records are accessible by users. A role hierarchy has multiple roles and sub roles. In SalesGrow CRM, you create a forecast target for the top most role in the hierarchy, i.e. for the organization. Forecasts targets are then set for the other roles in the hierarchy and the users in those roles.

- Users with administrator profile can create forecasts.
- Role managers can set targets for their roles, sub roles and the users in these roles.
- As each user can have only one role, you can have only one forecast target set for the user.

Configure the Organization's Forecast Settings

At first, a user with the administrator profile has to configure the organization's forecast settings in the SalesGrow CRM account. The settings include:

- Target Period of Forecast (Monthly or Quarterly).
- The start month of the Financial year.
- Field values based on which forecast targets are set.
  Make sure that you have created the fields based on your business requirements.

You can create forecast for a specific quarter/month only once. You can however modify the existing forecast details.

Create Forecasts Based on Role Hierarchy

In SalesGrow CRM, forecast is created for the top most role in the hierarchy, i.e. for the organization. Forecasts targets are then set for the other roles in the hierarchy and the users in those roles.

- Each role can have only one forecast for every quarter/month.
- A manager can be assigned to each role, failing which the parent role's manager owns the role.
- Each user can have only one forecast target set for every quarter/month.
- Only Role Managers and users with administrator profile can create forecasts.
- A role's manager can set targets for the users in the role. Users cannot set target for themselves.
- Role managers can set targets for themselves. If the role manager's superior changes the target, the role manager cannot change it.
- If a role does not have a manager, the manager of the superior role in the hierarchy can set targets for the users in the sub roles.
- You can create forecast reports based on roles

To create forecast for a quarter/month

1. Go to the **Forecasts** module.
2. Click on the **Create Forecast** icon.
   The *Create Forecast* icon will not be available while creating forecast for the first time.
3. Select the **month/quarter** and the **year** from the drop-down lists.
   Forecast will be created for the selected quarter/month.
4. Specify the sales **Target** for the month/quarter.

Target year and month

| 2013 | ⇕ | Q4 | ⇕ |

Target Amount

| 30000 | ⓘ |

Target for Child Roles

Role Name	Role Target	Manager Target
Director of Sales	5000 ⓘ	No Manager. Set Targets for this Role Users

5. Specify the **Target for Sub Roles** (the next level sub roles).
   You can specify the overall target for the role and also the target for the role manager. Targets for others users in these roles and sub roles can be set once you create this forecast.

6. Specify the target for each **User**.
   Only the users in the top most role of the hierarchy will be listed. To set targets for user in other roles, you need to drill down to each level in the role hierarchy. **See Also View Forecasts**
7. Click **Save**.

Set Targets for Sub Roles and its Users

You can drill down to each sub role and set targets for the sub roles, its managers and users.

To set target for sub roles

1. In the **Forecast** module, select the **Month/Quarter** and **Year** from the respective drop-down list to see the forecasts details.
2. Click on the **Role/User** links to drill down to the next level of forecast targets.
3. Specify the sales **Target** for the roles, role managers or users.
4. Click **Save**.

View Forecasts

Forecast Terminologies

- **Target** - Sales target that is set. You can set targets for roles, sub roles, role managers and users.
- **Achieved** - It is the closed potential amount for each role and its sub roles.
- **Pipeline Potential** - Expected amount of the potentials in pipeline for the month/quarter.
- **Target Achieved in %** - Percentage of target that is achieved.
- **Shortage in %** - Percentage of the target amount that is not in pipeline for the month/quarter.
- **Target Mismatch** - When there is a mismatch in the total target amount and the sum of individual targets for the sub roles and its users.
- **Star Performers** - Roles and users who have achieved the target and exceeded the target

Compute Options

There are two options to compute the Target Amount, Achieved Amount, Pipeline Potential, Target Achieved in Percentage, Shortage in Percentage and Target Mismatch when you view the forecast for a month/quarter.

- **Compute** - Calculates the forecast numbers for the role level that you are currently viewing.
- **Compute All** - Calculates the forecast numbers for all role and sub roles.
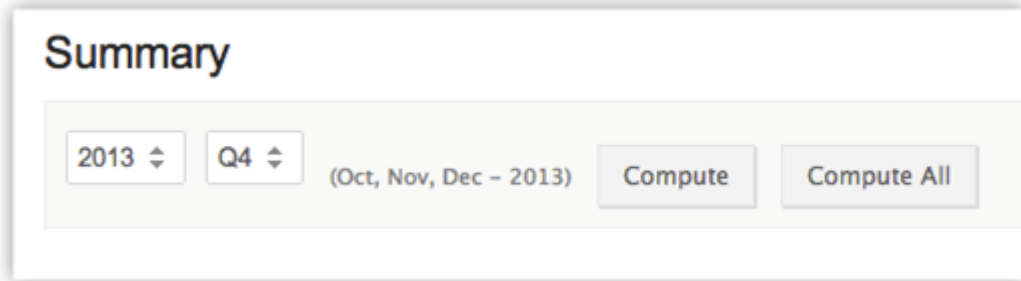
Drill Down Through the Forecast

Based on your role, you will be able to view the forecast details and drill down through the forecast targets of other levels in the role hierarchy. The CEO (top most role in the hierarchy) will be able to access all forecast targets set for other sub roles and its users. Whereas, Sales Executives may only be able to access their individual targets and the target set for their role.

- **Achieved** - Click to view the closed-won potentials that contributed in achieving the target.
- **Pipeline Potential** - Click to view the potentials in pipeline for the month/quarter.
- **Roles** - Click to drill down to the next level in the role hierarchy and view the targets set for the role. You can set targets based on your access permissions.
- **Users** -Click to drill down to the next level and view the targets set for the user. You can set targets based on your access permissions.
  Say there is Territory A and its Sub Territory B. If the role manager of terriotry A sets the target for the users in territory B, then the role manager for territory B cannot modify them.

3.5.2 Forecast Based on Territory Hierarchy

By default, forecasts in SalesGrow CRM are based on role hierarchy. However, if you enable territory management forecasts will be based on territory hierarchy. Territory Management in SalesGrow CRM is a system by which customer accounts are grouped based on a defined set of criteria. This makes for easy sharing of customer accounts among sales teams of your company. Users with administrator profile can create forecasts.

- Territory managers can set targets for their territories, sub territories and the users within.
- A user can have different targets set for each territory he belongs unlike forecasts in role hierarchy which allows only one target per role.

Availability

Permission Required: Available only if Territory Management feature is enabled.

Configure the Organization's Forecast Settings

At first, a user with administrator profile has to configure the organization's forecast settings in the SalesGrow CRM account. The settings include:

- Target Period of Forecast (Monthly or Quarterly).
- The start month of the Financial year.
- Field values based on which forecast targets are set.
  Make sure that you have created the fields based on your business requirements.

Note

- You can create a forecast for a specific quarter/month only once. You can however modify the existing forecast details.

Create Forecasts Based on Territory Hierarchy

When you enable Territories, you can create forecasts based on the territory hierarchy of your organization. Note that once enabled, all the existing forecast will be deleted.

- Each territory can have only one forecast for every quarter/month.
- A manager can be assigned to each territory, failing which the parent territory's manager owns the territory.
- Each user can have multiple forecast targets, one for each territory that the user belongs.
- Only Territory Managers and users with an administrator profile can create forecasts. Users cannot set target for themselves.
- Territory managers can set targets for themselves. If the territory manager's superior changes the target, the territory manager cannot change it.
- If there are three territory hierarchy levels, with a territory manager only for the first level, the manager will be able to:
  - Set forecast targets for the first and second levels while creating forecast for a month/quarter.
  - Set forecast targets for the third level once the forecast is created The territory manager needs to drill down to the third level to set targets for the users.
- If a territory does not have a manager, the manager of the superior role in the hierarchy can set targets for the users in the sub territories.
- You can create forecast reports based on territories.

To create forecast for a quarter/month

1. Go to the **Forecasts** module.
2. Click on the **Create Forecast** icon.
   The *Create Forecast* icon will not be available while creating forecast for the first time.

3. Select the **Territory** from the drop-down list.
4. Select the **month/quarter** and the **year** from the drop-down lists.
   Forecast will be created for the selected quarter/month.
5. Specify the sales **Target** for the month/quarter.

Create Forecast

| WTM L.T.D ⇕ | Q4 ⇕ | 2013 ⇕ |

Target Amount

| 30000 | ⓘ |

Target for Sub Territories

Territory Name	Territory Target		Manager Target	
America - Charles Stone	16000	ⓘ	2000	ⓘ
APAC - Nathan Brooks	14000	ⓘ	2000	ⓘ

Save   Cancel

6. Specify the **Target for Sub Territories** (the next level sub territories).
   You can specify the overall target for the territory and also the target for the territory manager.
   Targets for others users in these territories and sub territories can be set once you create this forecast.
7. Specify the target for each **User**.
   Only the users in the top most territory of the hierarchy will be listed. To set targets for user in other territories, you need to drill down to each level in the territory hierarchy.
8. Click **Save**.

Set Targets for Sub Territory and its Users

You can drill down to each sub territory and set targets for the sub territories, its managers and users.

To set target for sub territories

1. In the **Forecast** module, select the **Month/Quarter** and **Year** from the respective drop-down list to see the forecasts details.

2. Click on the **Sub Territory/User** links to drill down to the next level of forecast targets.

Sub Territories   Edit

Name	Target	Achieved	Pipeline Potential	Target Achieved in %	Pipeline Shortage in %
Japan	$10,000.00 !	$3,500.00	$3,000.00	35.0	35.0
Asia	$5,000.00	$3,000.00	$3,500.00	60.0	-
Middle East	$3,000.00	$4,000.00	$0.00	133.3 ★	-
	$18,000.00	$10,500.00	$6,500.00	58.3	5.6

3. Click the **Edit** link for the section that you want to modify.
   You can edit the targets for territories, territory managers or users based on your access privileges.

Edit Forecast: APAC(Q4-2013)

Target for Sub Territories

Territory Name	Territory Target	Manager Target
Japan - Hiyoshi Nakamura	10000 (i)	5000 (i)
Asia - Manish Patel	5000 (i)	5000 (i)
Middle East - Fatima Yilmaz	3000 (i)	3000 (i)

4. Click **Save**.

49

View Forecasts

Forecast Terminologies

- **Target** - Sales target that is set. You can set targets for territories, sub territories, territory managers and users.
- **Achieved** - It is the closed potential amount for each territory and its sub territories. It also includes the potentials owned by users who are not part of the territory.
- **Pipeline Potential** - Expected amount of the potentials in pipeline for the month/quarter. It also includes the potentials owned by users who are not part of the territory.
- **Target Achieved in %** - Percentage of target that is achieved.
- **Shortage in %** - Percentage of the target amount that is not in pipeline for the month/quarter.
- **Target Mismatch** - When there is a mismatch in the total target amount and the sum of individual targets for the sub territories and its users.

Sub Territories

Name	Target	Achieved	Pipeline Potential	Target Achieved in %
Japan	$10,000.00 !	$3,500.00	$3,000.00	35.0
Asia	$5,000.00	$3,000.00	$3,500.00	60.0
Middle East	$3,000.00	$4,000.00	$0.00	133.3 *
	$18,000.00	$10,500.00	$6,500.00	58.3

- **Star Performers** - Roles and users who have achieved the target and exceeded the target.

Sub Territories

Name	Target	Achieved	Pipeline Potential	Target Achieved in %
Japan	$5,000.00	$3,500.00	$3,000.00	70.0
Asia	$5,000.00	$3,000.00	$3,500.00	60.0
Middle East	$3,000.00	$4,000.00	$0.00	133.3 *
	$13,000.00	$10,500.00	$6,500.00	80.8

- **Target not set** - This will be visible next to the forecast target of the role, its manager or users in a role, when the target is not set.

- **Manager icon** - The territory manager will be indicated with an icon (refer to the image above).

Compute Options

There are two options to compute the Target Amount, Achieved Amount, Pipeline Potential, Target Achieved in Percentage, Shortage in Percentage and Target Mismatch when you view the forecast for a month/quarter.

- **Compute** - Calculates the forecast numbers for the territory level that you are currently viewing.
- **Compute All** - Calculates the forecast numbers for all territories and sub territories.

Drill Down Through the Forecast

Based on the territories that you are part of, you will be able to view the forecast details and drill down through the forecast targets of other levels in the territory hierarchy. For instance, in WTM Inc., users in the WTM Sales territory (top most territory in the hierarchy) will be able to access all forecast targets set for other sub territories and its users. Whereas, users in a sub territory may only be able to access their individual targets and the target set for their territory.

Sub Territories

Name	Target	Achieved	Pipeline Potential	Target Achieved in %
Japan	$10,000.00 !	$3,500.00	$3,000.00	35.0
Asia	$5,000.00	$3,000.00	$3,500.00	60.0
Middle East	$3,000.00	$4,000.00	$0.00	133.3 ★
	$18,000.00	$10,500.00	$6,500.00	58.3

- **Achieved** - Click to view the closed-won potentials that contributed in achieving the target.
- **Pipeline Potential** - Click to view the potentials in pipeline for the month/quarter.
- **Territory**- Click to drill down to the next level in the territory hierarchy and view the targets set for the territory.
- **Users** -Click to drill down to the next level and view the targets set for the user.

3.5.3 Set Fiscal Year

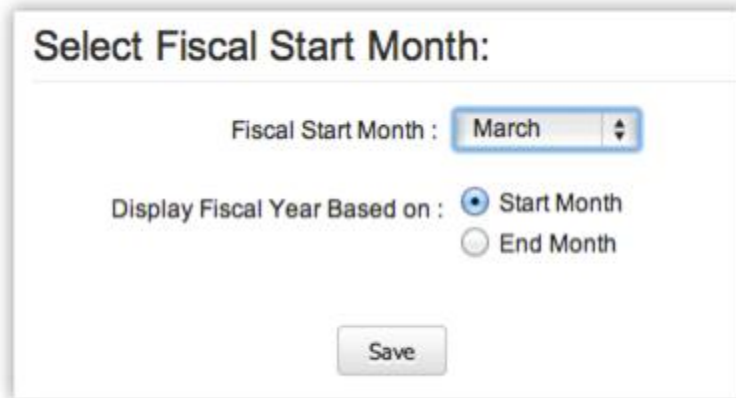**Set up Fiscal Year**

The first settings to configure when creating a forecast for the first time, is the Fiscal Year. Depending on your organization's financial cycle, you can specify the month the financial year begins.

To set up Fiscal Year

1. Click **Setup** > **Organization Settings** > **Fiscal Year**.
2. In the *Fiscal Year* page, select the **Fiscal Start Month** from the drop down list.

3. Choose **Start Month** or **End Month**.

4. Click **Save**.

Note

- By default, fiscal year is configured as January to December.
- Let's say your fiscal year starts in April 2013 and ends in March 2014. If you choose to name the fiscal year based on the start month, the year name will be displayed as 2013 (in reports and other mentions) and if you choose to name the fiscal year based on the end month, the year name will be displayed as 2014.

Create Forecasts

Forecasts are created to help every individual in the sales team, who has opportunities assigned to them and their managers.

Note

- By default, the person who creates the forecast owns it.
- Forecasts can be created for each quarter of the Fiscal Year.
- You can create forecasts for a specific quarter only once. However, you can modify the existing forecast details.
- You cannot customize the fields in the forecast module.

To create forecasts

1. In the **Forecast** module, click **New Forecast**.
2. In the *Create Forecast* page, select the **Year** and **Quarter** from the respective drop-down lists.
3. Click **Next**.
4. In the *Forecast Details* section, specify the following details:
   - Enter the target **Quota** for each month.
     The target quota is the same value entered in the *Amount* field in the *Potentials* module.
   - Specify the **Committed Amount** and **Best Case Amount** for each month's target quota.
5. Click **Save**.

Associate Forecasts with Other Records

Once the forecast is created, you can add potentials to each month. When the deal is closed it will automatically appear under forecast history. All the potentials created will show under each individual sales person's monthly forecast list for follow-up.

In the **Forecast Details** page, the details displayed are:

- **List of Potentials for each month:** Displays the list of potentials, the associated accounts and the corresponding forecast details for the month. You can also add new potentials to the month.
- **Forecast History:** Displays the over-all details of the forecast with aggregate **Quota**, **Closed Amount**, **Committed Amount** and **Best Case Amount** details.

Switch to New Forecast

Here is what is "new" in the New Forecasts

- Create Forecasts based on role hierarchy or territory hierarchy.
- Track the performance of individual roles/territories in the hierarchy.
- Track the performance of each user in the role/territory.
- Choose between the monthly or quarterly forecast options.
- Set targets for sub roles and its users in the hierarchy, once the forecast is created..
- Choose your forecast target from any numeric field in the Potentials module. In the old forecasts, it is based on the Amount field.
- Set sales targets for all the users in your role if you are the role manager.
- Set individual targets for role managers and the other users in the role, apart from an overall sales target for the role.
- Navigate easily to access the required data.
- Use the **Compute** option to calculate the status of forecast for any given month/quarter. It calculates the target achieved, potentials in pipeline, shortage in the pipeline, etc.
- Get notified when there is a mismatch in the target forecasted. For example, the role's target amount is USD 10000 and the targets for the sub roles are USD 5000 and USD 4000. In this case, you will be notified at once of the mismatch of USD 1000 in the target.

Sub Territories

Name	Target	Achieved	Pipeline Potential	Target Achieved in %
Japan	$10,000.00 !	$3,500.00	$3,000.00	35.0
Asia	$5,000.00	$3,000.00	$3,500.00	60.0
Middle East	$3,000.00	$4,000.00	$0.00	133.3 ★
	$18,000.00	$10,500.00	$6,500.00	58.3

- Identify the Star Performers in your team with the Star indicators.

Sub Territories				
Name	Target	Achieved	Pipeline Potential	Target Achieved in %
Japan	$5,000.00	$3,500.00	$3,000.00	70.0
Asia	$5,000.00	$3,000.00	$3,500.00	60.0
Middle East	$3,000.00	$4,000.00	$0.00	133.3 *
	$13,000.00	$10,500.00	$6,500.00	80.8

- Keep abreast of shortages in the pipeline. Know what percentage of the target amount is not in the pipeline for a given month/quarter.
- Be assured that the sales targets for a given role will be maintained for reference even when a user is moved from one role to another.

On Enabling the New Forecast

- Best Case and Committed Amount will not be available. Instead you will have other parameters to calculate, such as, target amount, achieved amount, pipeline potential, target achieved in percentage, etc.
- The existing forecasts will be removed. You will not be able to access the forecasts for the previous months.
- Forecast History (a history of changes made to forecasts) will not be maintained.

3.6 Activities

Activities play an important role in daily business operations. Activities can be either time bound calendar events, such as meetings, seminars, appointments, etc., or status bound tasks, such as send status report to manager, send email to customer, etc. In SalesGrow CRM, most of the records have activities as a related list for a better 360 degree view. You can associate activities with modules, such as leads, accounts, contacts, potentials, campaigns, etc. Under the Activities Module, you can store information related to Tasks, Events, and Calls.

3.6.1 Tasks

Create Tasks

A task is a specific piece of work required to be done within a given time frame. They are listed in the SalesGrow CRM's Home page of the user, Activities home page and in other related records.

Availability

Profile Permission Required: Access to the Activities Tab that includes View, Create, Edit and Delete permissions.

Check Feature Availability and Limits

To create tasks

1. In the **Activities** module, click **New Task**.
    You can also create a task from within a record by clicking the **New Task** link in the **Open Activities** related list.
2. In the *Create Task* page, specify the task details.
3. Click **Save**.

Note

- Tasks will be closed, only when the Status of the task is updated as *Completed*.
- The status, *Completed*, is a system defined field. An alternate custom field with the same label will not close the task automatically.

3.6.2 Events

Create Events

An event is an activity that happens at a given place and time. They are listed in the SalesGrow CRM's Home page of the user, Activities home page, Calendar and in other related records.

Availability

Profile Permission Required: Access to the Activities Tab that includes View, Create, Edit and Delete permissions.

Check Feature Availability and Limits

To create events

1. In the **Activities** module, click **New Events**.
2. In the *New Event* popup, specify the event details.
3. Click **Save**.

To create events from Calendar

1. Click the *Calendar icon* and select the *Day, Week* or *Month* view.
2. In the *Calendar*, click the **Create** link or click on a time slot in the calendar.
3. In the *New Event* popup, specify the event details.
4. Click **Save**.

Note

- Events are automatically closed at the specified end date and time. There is no status update for events.

3.6.3 Calls

The Log a Call functionality helps you to register the **inbound calls** (received from leads and customers) and **outbound calls** (dialed to leads and customers) with call details such as call duration, date and time of calls, notes, etc. Users who frequently make calls or receive calls in an organization can make use of this functionality in SalesGrow CRM.

For instance, this is of great help to the Customer Support Executives who often receive calls from their customers. By recording call logs, they can identify the time spent on each call and keep track of the average time spent in calls on a monthly basis. On the other hand, the Sales and Marketing Executives can keep track of all the calls they make to their prospects. The call details can be further used to generate reports on billing details, average time spent on calls, number of calls per day, etc.

Availability

Profile Permission Required: Access to the Activities Tab that includes View, Create, Edit and Delete permissions.

Check Feature Availability and Limits

Benefits

- Helps identify typical questions asked by users
- Keep track of all the customer calls for future reference.

Log a Call

Using the Log a Call feature in SalesGrow CRM you can capture the completed and current call details.

To log a current call

1. In the **Activities** module, click **New Call**.
   You can also add call details from within a record by clicking the **Log a Call** link in the **Open Activities** related list.
2. In the *Log a Call* page, specify the details of the call.
   You cannot add custom fields in the Log a Call page. However, you can customize the existing fields using page layout customization.
3. In the *Time Details* section, click **Current Call**.
   By default, *Current Call* is selected.
4. Click **Start**.
   The call timer indicates the duration of the current call.
5. Click **Stop** when the call is completed.
   The **Call Start Time** and **Call Duration** are automatically updated.
6. Click **Save** to save the current call.
7. Click **Save & Create Follow-up Task** to save and create a follow-up task.

Note

- The **Related To** field will be available only if you are calling a Contact.
- The user who logs a call is the Call Owner and you cannot change the owner of the call.
- Only users with permission to edit the call record can modify it.
- The details of the call will be available in the *Activities* tab.

To log a completed call or schedule a call

1. In the **Activities** module, click **New Call**.
   You can also add call details from within a record by clicking the **Log a Call** link in the **Open Activities** related list.

2. In the *Log a Call* page, specify the details of the call.
3. In the *Time Details* section, select **Completed Call/Schedule Call**.
   On selecting Schedule Call, you will ahve the option to assign the call to a user.
4. Enter the **Call Duration** of the call in minutes and seconds.
5. Click **Save**, or click **Save & Create Follow-up Task** to save and create a follow-up task.
   Save & Create Follow-up Task option is not available while scheduling a call.

- The **Related To** field will be available only if you are calling a Contact.
- The details of the call will be available in the *Activities* tab.
- You can mark the **Call Duration** and **Call Start Time** fields as non-mandatory.

Associate calls with CRM records

To associate calls with CRM records

1. Click the **Leads** or **Contacts** tab.
2. Select the record for which you want to log a call.
3. In the *[Record] Details* page, the existing call details, if any, are displayed.
   - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
   - Click the **Edit** or **Del** link to modify or delete the call details respectively.
4. Click the **Log a Call** link.
5. In the *Log a Call* page, enter the call related details.
6. Click **Save**, or click **Save & Create Follow-up Task** to save and create a follow-up task.

4. Marketing Automation

As part of the marketing automation, SalesGrow CRM provides **Campaign management**, **Email marketing**, and **Web Forms** (to generate leads, contacts, and cases) which are useful for integrating your organization's sales and marketing activities.

With the SalesGrow CRM campaign management features, you can effectively plan marketing expenditures and improve the quality of lead generation process. In addition, campaign management integrated with leads and opportunities modules helps your organization in measuring the campaign performance and effectiveness.

4.1 Campaigns

Plan, execute and monitor the performance of your marketing activities.

4.1.1 Create Campaigns

Create Campaigns

In SalesGrow CRM, you can create campaigns by:

Entering data in the campaign details form: You can manually fill in the campaign details gathered from various external sources.

Note

- Some of the standard fields listed below may not be visible or editable depending on your organization's business process.
- In case you want to add or modify fields, please contact your System Administrator for more details on the usage of other fields.

Create Campaigns Individually

You can create campaigns individually by using the following:

- Filling in the details in the campaign creation form.
- Cloning the campaign with a few changes in the existing record.

Note

- By default, the person who creates the campaign owns it.
- To change owner, click the **Change** link in the **Campaign Owner** field from the *Campaign Details* page and select another user.

To create campaigns individually

1. In the **Campaigns** module, click **New Campaign**.
2. In the *Create Campaign* page, enter the campaign details.
3. Click **Save**.

To clone campaigns

1. In the **Campaigns** tab, click a particular campaign that is to be cloned.
2. In the *Campaign Details* page, click **Clone**.
3. In the *Clone Campaign* page, modify the required details.
4. Click **Save**.

4.1.2 Associate Campaigns

Associate Campaign with Other Records

After creating campaigns, you may need to associate campaigns with other records, such as tasks, events, attachments, leads, contacts, and potentials.

In the *Campaign Details* page, you can associate the following:

- **Open Activities:** To add tasks and events.
- **Closed Activities:** To display the closed tasks and events.
- **Potentials:** To display the potentials converted through a campaign.
- **Attachments:** To attach documents to the campaign.
- **Leads:** To display the leads generated through a campaign.
- **Contacts:** To display the contacts generated through a campaign.

Associate Leads/Contacts to the Campaign

There are many types of campaigns that can be organized. For example, Trade Shows, Direct Mailer, Telemarketing, Print or Online Ads etc. The prime focus of campaigns is to acquire information from leads who have an interest in what you offer. Many leads maybe associated to a single campaign as you may have included some existing leads to take part in a particular campaign. In such cases, it is necessary that you keep track of all the leads as a result of the campaign. Using the Campaigns module, you can store all the necessary details in a well organized manner, for future reference.

Add New Leads/Contacts to the Campaign

To associate new leads

1. In the *Campaign Details* page, the existing lead details, if any, are displayed.
   o Click the column headings to sort the display order of the records.
   o Click the relevant **Edit** link to modify the campaign member status of the lead.
2. Click the **New** link.
3. In the *New Lead* page, specify the lead details.
4. Click **Save**.

To associate new contacts

1. In the *Campaign Details* page, the existing contact details, if any, are displayed.
   o Click the column headings to sort the display order of the records.
   o Click the relevant **Edit** link to modify the campaign member status of the contact.
2. Click the **New** link.
3. In the *New Contact* page, specify the contact details.
4. Click **Save**.

Associate Existing Leads/Contacts

To associate existing leads or contacts to the campaign

1. In the *Campaign Details* page, the associated lead or contact details, if any, are displayed.
2. Click **Associate Existing Leads/Contact**.
3. In the *Add Existing Leads/Contacts* page, specify the criteria to search the required records.
4. Click **Search**.
5. Under *Matching Leads/Contacts*, select the check box(es) of the records that you want to associate to the campaign.
6. Select the Campaign Member Status from the **Status** drop-down list.
7. Click **Add to Campaign**.
   The selected records will be associated to the campaign.

Import Leads or Contacts

You can import a list of leads into SalesGrow CRM and directly associate them to the campaign. Note that while importing, the first campaign member status will be applied to all the leads or contacts. You can later change the campaign member status whenever needed.

If the import file is in XLS, XLSX or VCF format, you can import a maximum of 1500 records/batch. Records more than 1500 can be imported in CSV format.

To import leads or contacts

1. In the *Campaign Details* page, the associated lead or contact details, if any, are displayed under Leads/Contacts related lists.
2. Click **Import**.
3. In the *Import Leads* page, specify the import details.
   The Imported leads/contacts will be associated to the campaign.

Mass Update Campaign Member Status

The campaign member status defines the status of the leads or contacts who are part of the campaign. Note that the Status of a Lead is different from the Campaign Member Status.

To update campaign member status

1. In the *Campaign Details* page, the associated lead or contact details, if any, are displayed.
2. Click **Mass Update Member Status**.
3. In the *Mass Update Campaign Member Status* page, select any of the following to get the list of records that you want to update:
   1. **All Records** - Select this option and click **Fetch** to list all the records.
   2. **Manual Criteria** - Select this option, provide search criteria and click **Search** to list records based on the criteria.
4. Under *Matching Leads/Contacts*, select the check box(es) of the records.
5. Select the Campaign Member Status from the **Status** drop-down list.
6. Click **Update Member Status**.
   The selected records will be updated with the status that you specify.

4.1.4 Add Campaigns to Leads/Contacts

Add Campaigns to the Leads/Contacts

To add campaigns to leads or contacts

1. Click the **Leads/Contacts** tab.
2. In the *Leads/Contact Details* page, the existing campaign details, if any, are displayed.
   o   Click the column headings to sort the display order of the records.

- o   Click the relevant **Edit** or **Remove** link to change the member status field or remove the campaign association from the record respectively.
3. Click **Add Campaigns**.
4. In the *Add Campaigns to Lead/Contact* page, do the following:
   - o   Choose the campaign member **Status** from the drop-down list.
   - o   Select the check box(es) of the campaigns that you want to associate to the lead or contact.
5. Click **Add to Lead/Contact**.

Customize Campaign Member Status

Each member associate to a campaign needs a campaign member status. For example, for a Trade Show campaign, the leads or contacts associated to it may have their status as Invited, Attended, Not Attended etc.

To customize campaign member status

1. Click **Setup** > **Customization** > **Fields** > **Campaigns** > **Campaign Member Status**
2. In the *Customize Campaign Member Status* page, all the status values will be listed. You can do the following:
3. **Add Member Status** - Click the **Add Status** link and enter the value along with its display **Order**. (Note that you have a maximum of **20 member status values**.
4. **Delete Member Status** - Select the check box(es) of the values and click the **Delete Status** link to delete the value(s).
5. Click **Save**.

4.1.5 Standard Fields

Standard Fields in Campaigns

Following are the list of SalesGrow defined standard fields available in the Campaigns module:

Field Name	Description	Data type	Maximum Limit
Campaign Owner	Select the name of the user to whom the campaign is assigned.	Pick list	-
Campaign Name*	Specify the name of the campaign.	Text box	Alphanumeric(40)
Type	Select the type of the campaign.	Pick List	-
Status	Select the status of the campaign.	Pick List	-
Start Date	Specify the date on which the campaign starts.	Date format	-
End Date	Specify the date on which the campaign ends.	Date format	-
Expected Revenue	Specify the revenue expected after launching the campaign.	Currency	-

Actual Cost	Specify the actual amount spent on the campaign.	Currency	-
Budgeted Cost	Specify the planned amount to be spent on the campaign.	Currency	-
Expected Response	Specify the campaign turnout percentage.	Number	
Num sent	Specify the number of leads/contacts to whom the campaign details has been sent.	Text box	Integers
Created By	Displays name of the user created the campaign first time.	Date/Time	-
Modified By	Displays name of the user modified the campaign	Date/Time	
Description	Specify additional details about the campaign.	Text area	32000 characters

4.2 Web Forms

Build web forms to capture leads, contacts and cases online.

4.2.1 Set up Web Forms

Creating a web form involves three steps

- **Building the form** - Drag and drop fields to build a form and format it easily with the WYSIWYG editor.
- **Specifying the form details** - Add details such as form name, landing page URL (where the visitor needs to be redirected after the form is submitted) record assignment rule, notification details, etc.
- **Generating the code for the form** - Embed the form using various code formats. Codes for some third-part sites (WordPress, Google Sites, Facebook, and Joomla) are readily available.

You can build web forms to generate records for the **Leads**, **Contacts**, **Cases** and any other **Custom modules**. While building a web form, the following elements are available in the form:

Option	Description
Add Fields	Drag and drop the fields that are required in the form. By default, some of the fields are already added when you build a new form.
Set fields' font and form layout	Use the WYSIWYG editor to change the font style and size, background color, alignment of the fields, etc. in the form.
Insert Captcha	Captcha is used for security in feedback forms, website registration, comments from visitors, etc. Add captcha for the SalesGrow CRM system to prevent unauthorized automated spamming programs from filling the web form. This option is available only in the Paid Editions.
Upload Files in the form	With this option capture files through your web-to-lead/contact/case forms, such as screenshots of an issue, quote requests, photo of individuals, etc. The size of the file should be within 20 MB. If the file size exceeds the limit, the form will not be submitted and the record will not be added in SalesGrow CRM. This option is available

	only in the Paid Editions.
Mark fields as mandatory	Collect important information such as name, email address, mobile number, etc. from the visitors who fill up the web form by marking fields as mandatory.
Mark fields as hidden	Add a hidden field and its value in the form. These hidden values are submitted along with the web form but are hidden to the visitors who fill the form.
Add help link for a field	A field you provide may require data to be filled in a specific format. For example, the date format may need to be specified in DD-MM-YYYY. For such requirements, you can use the option to add a tip or hint to help the visitor who fills the form.
Change button name	The name of the call to action button can be Save, Submit, or another other name. You can easily change the name as per your requirements.
Specify location URL of the form	The Location URL is the web page URL where you plan to host the web form. Specifying the URL helps prevent spam and allows only forms submitted through the particular domain to be captured as valid information.
Specify landing page URL	This is the URL of the web page to which the visitor needs to be redirected once the web form is submitted.
Select record assignment rule	Records generated through the web forms can be automatically assigned to the users in CRM with the help of Assignment Rules.
Specify notification options	Set notifications that needs to be sent to the record owners and also the visitors who submit the forms. Email templates or autoresponse rules can be used to send notification emails.
Embed form code	Embed the web form's code in your web page. The code is available in three different formats - HTML source code, Embed code and iFrame code.

Generating Web Forms

To generate web forms for Leads, Contacts, and Cases

1. Click **Setup** > **Website Integration** > **Web Forms**.
2. In the *Web Forms* page, choose the **Module** from the drop-down list.
   The existing web forms for the selected module will be listed.
3. Click **Create Web Form**.
4. In the web form builder, do the following:
   o **Build a form**
     ▪ Drag and drop the fields that you need in the web form.
     ▪ Insert captcha.
     ▪ Add the option to upload files.
     ▪ Mark fields as mandatory.
     ▪ Make fields hidden in the form.
     ▪ Provide hint or help links for fields.
     ▪ Set font and layout of the form.
     ▪ Change button names.
   o **Specify form details and other options**
     ▪ Add form details such as, form name, landing page URL, form location URL.
     ▪ Set record assignment rule.
     ▪ Set notification options

- o **Copy web form code and embed options**
  - ▪ Get code to embed in your site and other third-party sites.
    The code is available in three different formats - HTML source code, Embed code and iFrame code.

Step 1: Build a Form

Drag & drop fields in the WYSIWYG editor, which also provides various other options to build a form.

Add Fields

Drag & drop the fields you need in the form and change the font style and size, background color, alignment of the fields, etc.

To add fields and set font and layout of the form

1. Under the *Fields List* tab, click on a field and drag & drop it in the form builder.
2. Make changes to the font, background color, field label alignment and form width.

Note

- By default, some of the fields are already added in the form.
  - o For Leads and Contacts - **Last Name**, **Email** and **Phone** fields.
  - o For Cases - **Status**, **Subject** and **Description** fields.

- You cannot remove the following fields from the form, as they are mandatory for a record.
    - For Leads and Contacts - **Last Name** field.
    - For Cases - **Subject** field.
- To have custom fields, you need to first create them in the particular module.
- When you add the **Account Name field in the web form for Contacts** and contact details are submitted, an account will automatically be created in SalesGrow CRM. If an account with the same name already exists in your CRM account, an account will not be created when the form details are submitted.
- An Account will be created, even if certain mandatory field details are not provided. Later, when the account is edited, you need to provide the other mandatory details before saving the record.

Upload Files

Capture files through your web-to-lead/contact/case forms, such as screenshots of an issue, quote requests, photo of individuals, etc. The size of the file should be within 20 MB. If the file size exceeds the limit, the form will not be submitted and the record will not be added in SalesGrow CRM. This option is available only in the Paid Editions.

To add the option to upload files

1. Click the **Advanced Tools** tab.
2. Drag & drop the **File Upload** field.
   Note that the visitor can upload a file not more than 20 MB. You can use the help link option in the *Field Settings* to provide this hint.
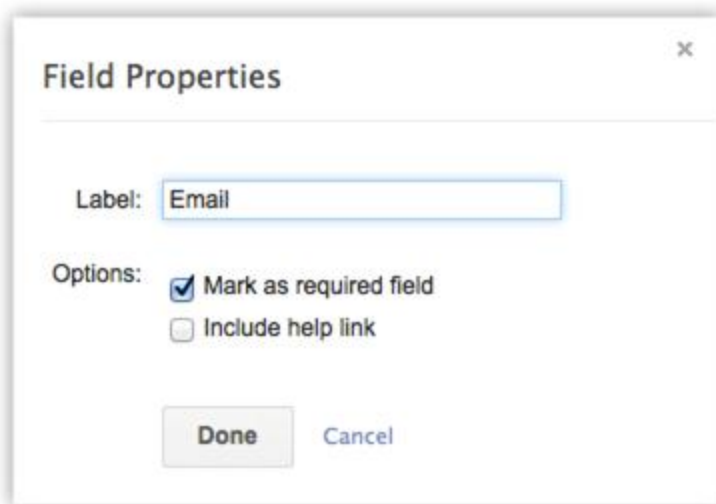
Mark Fields as Mandatory

Collect important information such as name, email address, mobile number, etc. from the visitors who fill up the web form by marking fields as mandatory.

To mark fields as mandatory

1. Move your mouse pointer to the field that you want to mark as mandatory.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, select the **Mark as required field** checkbox.
4. Click **Done**.

Mark Fields as Hidden

Add a hidden field and its value in the form. These hidden values are submitted along with the web form but are hidden to the visitors who fill the form. For example, if you have hosted the same form in various web pages, the hidden field will help you identify which record is generated form a web form hosted in a specific web page.

To make fields hidden in the form

1. Move your mouse pointer to the field that you want to hide in the form.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, select the **Mark as hidden field** checkbox.
4. Specify the value for the field and click **Done**.

Provide Help Link

A field you provide may require data to be filled in a specific format. For example, the date format may need to be specified in DD-MM-YYYY. For such requirements, you can use the option to add a tip or hint to help the visitor who fills the form.

To provide hint or help links for fields

1. Move your mouse pointer to the field for which you want to provide hint or help link.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, select the **Include help link** checkbox.
4. Choose one of the following:
    o **Link & Text** - Specify a text for the link and provide the link URL.
    o **Link Only** - Specify the help/hint text. For example, the date field can have - MM-DD-YYYY
5. Click **Done**.

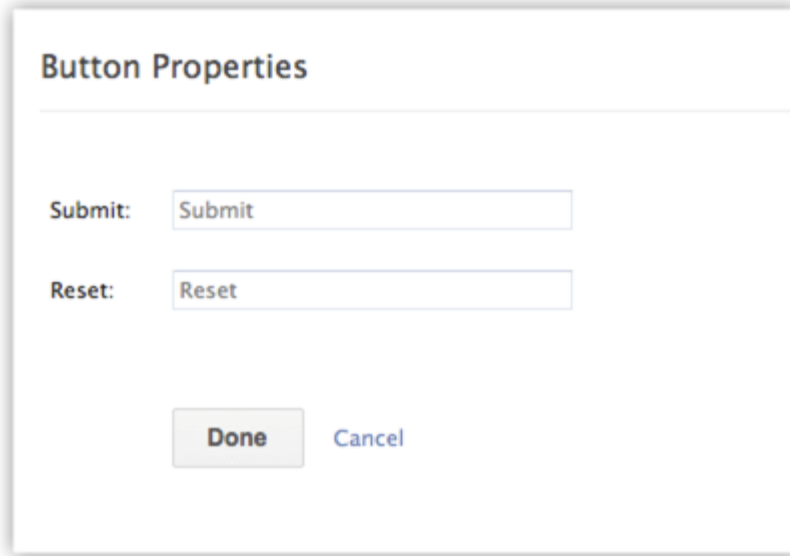**Change Button Name**

By default, there are two call to action buttons - **Submit** and **Reset**. You can rename these buttons as per your requirements.

To change button names

1. Move your mouse pointer to the field that you want to rename in the form.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, modify the field name.
   The name of the field will be changed only in the form.
4. Click **Done**

Button Properties

Submit: Submit

Reset: Reset

[Done] Cancel

Remove Field from the Form

Easily remove unwanted fields from the web form and add them whenever required.

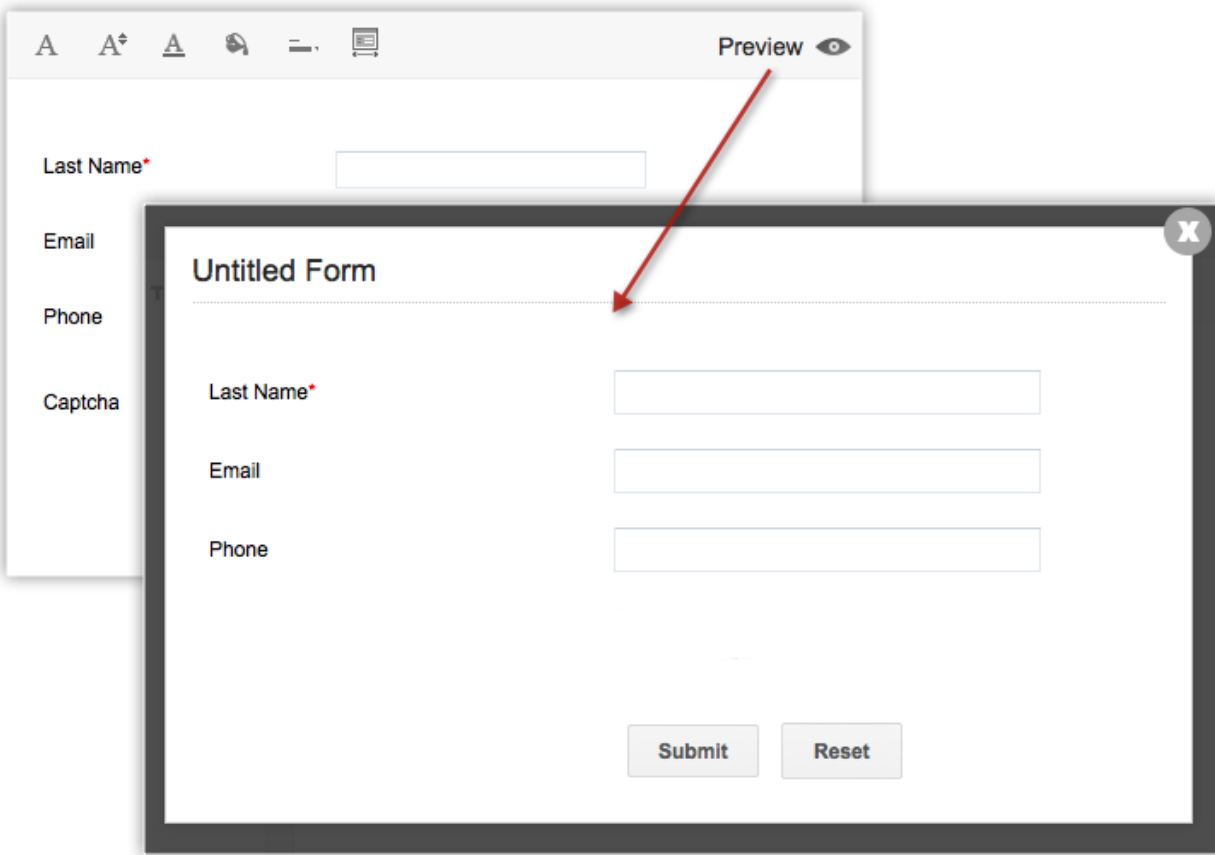To remove a field from the form

1. Move your mouse pointer to the field that you want to remove from the form.
2. Click on the **Delete** icon.

Preview the Web Form

Take a look at the web form before publishing it in your web site.

To preview the form

1. In the form builder, click on the **Preview** link.
    A preview of the form will be available.

Step 2: Specify Form Details

1. Enter a **Form Name** (Example: Feedback, Contact Us, etc.).
2. Specify a **Landing page URL**. The visitor who submits the form will be redirected to the URL specified here. It should start with **"http:// or https://"**.
   The length of Return URL should not exceed 255 characters. (Example: **https://www.zillum.com/thank-you.html**)
3. Specify a **Form Location URL**. This should be the webpage where the web form will be hosted. It should start with **"http:// or https://"**. (Example: **https://www.zillum.com/contact-us.html**)
   If you plan to host the web form in multiple websites or you are not sure where the web form will be hosted, enter * in this field. This prevents spam and allows only forms submitted through

the particular domain to be captured as valid information.

4. Choose one of the following options to **Assign Owner** to the records that are submitted via web form.
   - o **Choose a User** - Select from the drop-down list. All the records generated through the form will be assigned to the selected user.
5. **Create or Choose [Module] Assignment rule** to assign ownership - Select an existing assignment rule or create a new one. Based on the rule, records will be assigned to the users. With assignment rules you can implement the **Round Robin** method to assign records to the users.
6. Click **Save**.

Step 3: Use Web Form Code to Embed

The code for the web form is available in 3 formats: **Source Code**, **code to Embed**, **iFrame code**. The code is also readily available for some third-party sites - WordPress, Facebook, Google Sites and Joomla. Please note that the Script and iFrame code is available only in the Paid Editions.

1. Click on **SalesGrow Sites**, **WordPress**, **Facebook**, **Google Sites**, or **Joomla** to get the respective code.

2. Copy the code and paste it in the website where you want the web form.
3. Click **Done**.

Note

- In order to avoid spam, the generated Web Form (HTML file) must be published in an active web server (Apache, Microsoft, IIS, etc.).
- The web form will not work if you submit the form values from your desktop.
- When the HTML code is generated for the web form, certain entities are hidden by default. If you remove those hidden entities, the web form will not work. Here is the code snippet that should not be removed from your web form code:

<input type="hidden" name="xnQsjsdp" value="" /> <input type="hidden" name="xmIwtLD" value="" /> <input type="hidden" name="actionType" value="" /

4.2.2 Auto Response Rules

The Auto Response rule feature enables you to send automated emails when **leads, contacts**, **cases** or **records for the custom modules** are generated through web forms. When a lead is generated through web forms, you may want to send appropriate emails to the leads with different types of requests. In such cases, you can create an auto response rule with specific rule criteria. When the condition is satisfied, the corresponding email is sent. You can create numerous auto response rules but only one auto response rule can be active at a time.

Note

- When the details gathered through the web form does not satisfy the Auto Response Rule criteria, then the email template (acknowledgment email) selected while creating the web form will be sent.

Availability

Profile Permission Required: Users with the permission to create web forms can access this feature.

Check Feature Availability and Limits

Create Auto Response Rule

To create auto response rules for web forms

1. Click **Setup** > **Website Integration** > **Auto Response Rules**.
2. In the *Auto Response Rules* page, select the module from the drop-down list.
3. Click **Create Rule**.
   You will be able to create the auto response rule for the selected module.
4. In the *Create Auto Response Rules for Web to [Module]* page, do the following:

    o   Enter the **Rule Name**.

    o   Select the check box to activate the rule.

5. Click **Save**.

Note

- Once the rule is created, you need to define the criteria (i.e. create rule entries) based on which the email template will be sent to the visitor who submits the web form.

Create Auto Response Rule Entry

To create auto response rule entry

1. Click **Setup** > **Website Integration** > **Auto Response Rules**.
2. In the *Auto Response Rules* page, click on the rule for which you want to create the rule entry.
3. In the *Auto Response Rules for Web to [Module]* page, click **Create Rule Entry**.

4. In the *Rule Entry* page, do the following:
    o   Specify the **Rule Criteria**.

o Choose an **Email Template** from the drop down list.
If you do not have email templates created for the module, you can click on the **Create an Email Template** link.

5. Click **Save**.

Note

- When the details gathered through the web form does not satisfy the Auto Response Rule criteria, then the email template selected while creating the web form will be sent.

4.2.3 Unsubscription Form

Setting up an Unsubscribe Form

This feature helps you to generate the HTML code for the Unsubscribe Form. You can use the Form to provide an Unsubscribe option for the email recipients. The process to set up the form consists of three parts.

Availability

 Profile Permission Required: Users with the Unsubscribe Form permission in profile can access this feature.

Part 1 - To generate an unsubscribe Form

1. Click **Setup** > **Website Integration** > **Unsubscription Form**.
2. In the *Unsubscription Form* page, do the following:
   o Enter your website address in the Return URL field.
   o Click **Generate HTML**.
3. Copy and paste the generated HTML code into HTML editor and save it as an HTML file.
4. Click **Finish**.

Part 2 - To publish the unsubscribe Form

When you want to publish the unsubscribe form in a web page and provide a link to the web page from an email.

1. Create a web page in your website and paste the generated HTML code in the page.

2. Get the URL for the web page that you created in your website.

Part 3 - To add unsubscribe link in the email template

1. Click **Setup** > **Templates** > **Email Template**.
2. In the *Email Templates* page, click the **Edit** link corresponding to the email template you want to provide the Unsubscribe option.
3. Click **Edit**.
4. In the **Footer** section, type your desired content. *Example*: "Click here to unsubscribe".
5. Select the **View HTML source** check box and provide a link to the page where the unsubscribe form is published. Example:
   Click here to unsubscribe.
6. Click **Save**.

Part 4 - To use unsubscribe option

1. Click the **Unsubscribe** link in an email message.
2. Enter the Email address and click **Unsubscribe**.
3. The **Email opt out** option for the **Lead** and/or **Contact** will be automatically selected.
   emails will not be sent to the Leads or Contacts, if the Email Opt Out check box is selected.

Note

- If the user enters a Secondary Email Address, then also the email opt out option will also be selected.
- The HTML code cannot be embedded directly in your email template.
- You need to save the generated code as an HTML file and use the link in the email template.

4.3 Mass Email

Send mass emails to your leads and contacts use autoresponders to follow up with customers.

4.3.1 Send Mass Emails

Send Mass Emails

In SalesGrow CRM, you can send mass emails to customers manually, by creating a new mailing list or by using an existing list. You can select the list of recipients in two ways:

- Instant Filter (creating New Custom View)
- Existing Custom View

Note

- The Mass Email feature is available only in the Leads and Contacts modules.
- You need to create email templates before sending mass emails.

- Bounced email notifications for mass emails are not tracked in SalesGrow CRM.
  However, if the user has configured SalesGrow Mail Addon, notifications about bounced emails can be tracked only for individual emails (but not mass emails). The notifications are sent to the user's primary email address that has been configured.

Availability

Profile Permission Required: Users with the Mass Email Leads/Contacts permission in profile can access this feature.

Check Feature Availability and Limits

To send mass emails

1. Click the [Module] **tab**.
   Module refers to Leads, Accounts, Contacts, etc. tabs.
2. In the *[Module] Home* page, click **[Module] Tools** > **Mass Email [Module**].
3. In the *Mass Email* page, by default, the system displays the **Email Template** tab.
4. Under the **Email Template** tab, do the following:
   - o Select the **Template** from the list.
     Note, that you cannot edit the email content here.
   - o Click the **New Template** link to create a template.
5. Under the Select Records tab, do the following:
   - o Click **Custom View Criteria**, and then **Select Custom View** from the list, or
   - o Click **Manual Criteria**, to search and select the required records manually.
     The system will display only those records that contain an email address. While sending mass emails to contacts, you can also specify the criteria based on the fields in the Accounts module.
6. Click **Send**.

4.3.2 Schedule Mass Emails

Schedule Mass Email

This feature allows you to schedule bulk emails to be sent to selected leads or contacts. For example, you want to send an email to customers at 10 AM PST, but you have an important meeting at that time. You can schedule the email to be sent at that specific time by using the **Mass Email Scheduler**, even in your absence.

Profile Permission Required: Users with the Mass Email Leads/Contacts permission in profile can access this feature.

Check Feature Availability and Limits

Note

- For a given scheduled time only three mass email processes are possible.

To schedule mass emails

1. Click the **Leads or Contacts** tab.
2. In the *Home* page, under Leads/Contacts *Tools*, click **Schedule Mass Email**.
3. Click **New Mass Mail Schedule**.
4. In the *New Mass Mail Scheduler* page, do the following:
   - o Enter the **Mass Mail Scheduler Name**.
   - o Select the **Custom View** from the list.
   - o Select the **Email Template** from the list.
   - o Select the **Active** check box.
     Only when you select the *Active* check box, will the scheduled emails be delivered.
   - o Enter the **Start Date** and **Time** to schedule the emails. Enter the date in MM/DD/YYYY format, or select the date from the calendar displayed. Select the hours and minutes from the respective lists.
5. Click **Save**.
   The system displays the View Mass Mail Schedule page.
6. Click **Edit** or **Delete**, as required.
7. Click **Go Back**. The created Scheduler is displayed under Mass Mail Schedulers.

5. Account Settings

The CRM account settings consists of Personal and Organizational Settings. Before you start working with your account, you need to set up the personal settings such as defining a country locale, language, time zone, date format, etc. Users in an organization work from different locations, across different time zones and geography. They can set up their personal preferences in SalesGrow CRM. If you have set up an organization's account, you can setup fiscal year, business hours etc. for your organization.

5.1 Personal Settings

Personalize your CRM account by setting up your country locale, time zone, language and personal details.
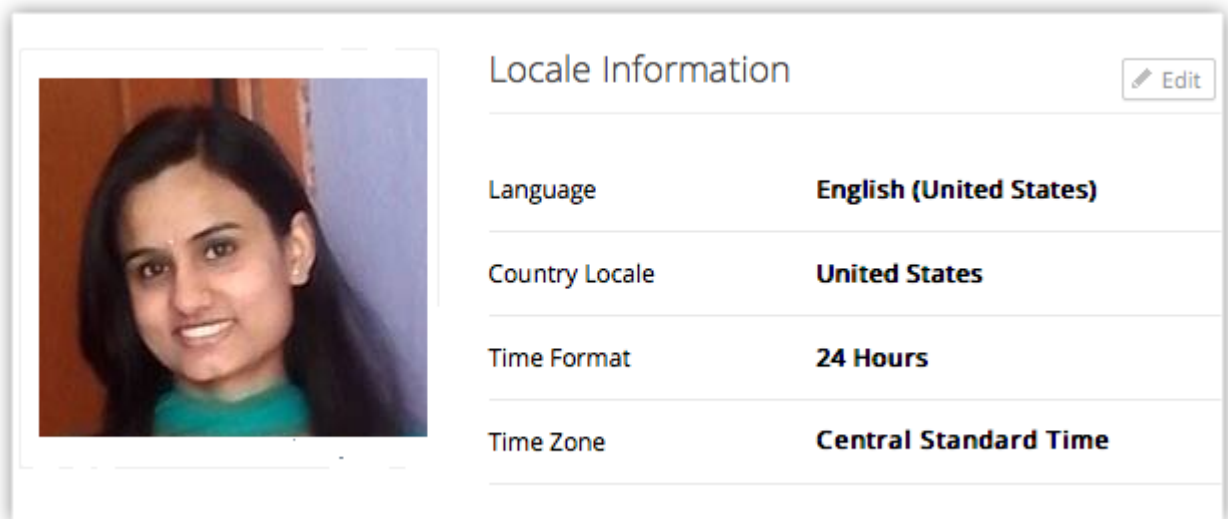
5.1.1 Change Language

Change Locale Information

Based on the country locale, you can mention the language for your account. Also, choose between 12 hr time format and 24 hr time format in the CRM account. The date format is automatically updated with the country locale that you select. The following international date formats are supported:

- dd-mm-yyyy
- mm-dd-yyyy
- yyyy-mm-dd

To change language, country locale, time format and time zone.

1. Click **Setup > Personal Settings > Account Information.**
2. In the *Account Information* page, click **Edit** for the *Locale Information* section.

3. Choose the value from the corresponding drop-down lists.
4. Click **Save**.

Change Name Format

By default, the name format is set as **<Salutation> <First Name> <Last Name>**. However, you can change the name format as per naming conventions used in your country.

Example: In the USA the name format is generally **<Salutation> <First Name> <Last Name>** whereas in Japan the format is **<Last Name> <First Name> <Salutation>**

To change name format

1. Click **Setup** > **Personal Settings** > **Name Format**.
2. In the *Name Format* page, drag and drop the **Salutation**, **First Name** and **Last Name** to change the order.

3. Click **Save**.

5.1.2 Use Signature

While sending emails to your customers, you can embed a signature automatically in the body of the message. Signatures can be customized as per your requirement.

To use the signature feature

1. Click **Setup** > **Personal Settings** > **Account Information**.
2. In the *Account Information* page, click **Edit** for the *Signature* section
3. Specify the signature in the HTML editor.
   To use the signature in emails, you need to enable the **Add User Signature** check box in the email template.
4. Click **Save**.

Add Logo in your Signature

You can also add a logo in your signature by providing the image source in the HTML code.

To add logo in your signature

1. Click **Setup** > **Personal Settings** > **Account Information**.
2. In the *Account Information* page, click **Edit** for the *Signature* section

3. In the editor pop-up box, click to select an image and insert.
4. Click **Save**.

5.1.3 Update Personal Information

You can change your personal details such as name, phone number, website, date of birth, address, language, time format, time zone, etc.

To change personal details

1. Click **Setup** > **Personal Settings** > **Account Information**.
2. In the *Account information* page, click **Edit** for the corresponding section.
3. Modify the personal details as required. (Refer to the table below)
4. Click **Save**.

List of Standard Fields

Field Name	Description	Data Type
First Name	Specify the first name of the user.	Text box
Last Name*	Specify the last name of the user. This field is a mandatory field.	Text box
Alias	Specify the other name of the user.	Text box
Email Address*	Specify the login name of the SalesGrow CRM user. This is a mandatory field.	Text box
Active	Specify the status of the user. By default the status is active. If required the System Administrator can deactivate the user, so that user cannot access the SlaesGrow CRM system.	Check box
Role*	Select the role (for example, Administrator, Standard User, and others). This is a mandatory field. Only if you have the Administrator profile, you can change this value.	Pick list
Email*	Display the primary E-mail ID of the user. This field can be updated in SalesGrow Accounts.	Email
Website	Specify the website URL of the user.	URL
Phone	Specify the official phone number of the user.	Pick list
Mobile	Specify the mobile phone number of the user.	Text box, integer value
Fax	Specify the FAX number of the user.	Text box
Date of Birth	Select the date of birth of the user from the mm/dd/yyyy drop-down list	Date box
Street	Specify the primary address of the SalesGrow CRM user.	Text box
City	Specify the name of the city where the user lives.	Text box
State	Specify the name of the state where the user lives.	Text box
Zip	Specify the postal code of the user's address.	Text box, integer value
Country	Specify the name of the user's country.	Text box
Language*	Select the language. This field is a mandatory field.	Pick list
Country	Select the country locale to specify your date format. This field is a	Pick list

Locale*	mandatory field.	
Time Zone*	Select the time zone in which you are working. This field is a mandatory field.	Pick list

5.1.4 Themes

SalesGrow CRM Themes give individual users the option to customize the colors and layout of their CRM account. The following options are available:

- Change the color of tabs and their fonts.
- Change the background color.
- Swap between Fixed and Fluid screen layout.

Please note that this customization is User specific, i.e. a theme changed by one user will not be reflected in another user's CRM accounts.

To change theme

1. Click **Setup** > **Personal Settings** > **Theme**.
2. In the *Themes* page, do the following:
   - o Under *Tab Bar*, select **Default** or **Custom**.
   - o Choose color for the **Normal Tab** and the **Normal Tab Fonts**.
   - o Choose color for the **Selected Tab** and the **Selected Tab Fonts**.

o Under *Background*, choose **Default**, **Gray** or **White**.

3. Click **Save.**

5.2 Organization Settings

 Specify company details, your organization's business hours, fiscal year and currencies.

There are certain organization specific details, which help differentiate one organization from the other. SalesGrow CRM recommends Users with Administrator's privilege to customize these company specific details so that all users under an organization-specific account will have these common features.

5.2.1 Change Company Details

To change company details

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Organization Settings** > **Company Details**.
3. In the *Company Details* page, click **Edit**.
4. Make the necessary changes to the details.
5. Click **Save**.

5.2.2 Personalize Logo

In order to give a personalized look to your account, SalesGrow CRM allows organizations to change the default logo to your company logo. The customized company logo will appear for all the users within the account.

- The image file size should not exceed 20 KB.
- For best results, the logo dimension should be 190 (width) by 65 (height) pixels.
- The logo file format should be .jpg / .png / .gif.

To personalize logo

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Organization Settings** > **Company Details**.
3. In the *Company Details* page, click **Edit**.
4. Under *Company Logo* section, browse and select the logo.
5. Click **Save**.

5.2.3 Set Currency

Currency settings are an organization specific feature. By default, the currency is set to US dollars ($). However, user(s) with Administrator privilege can change the currency settings depending on the organization's requirement. Based on the country locale you choose, the currency value will be updated for Quotes, Invoices, Campaigns and other billing related fields.

To select currency

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Organization Settings** > **Company Details**.
3. In the *Company Details* page, click **Edit**.

Locale Information:

Currency Locale: United States

Time Zone: (GMT -8:0) Pacific Daylight Time(PST)
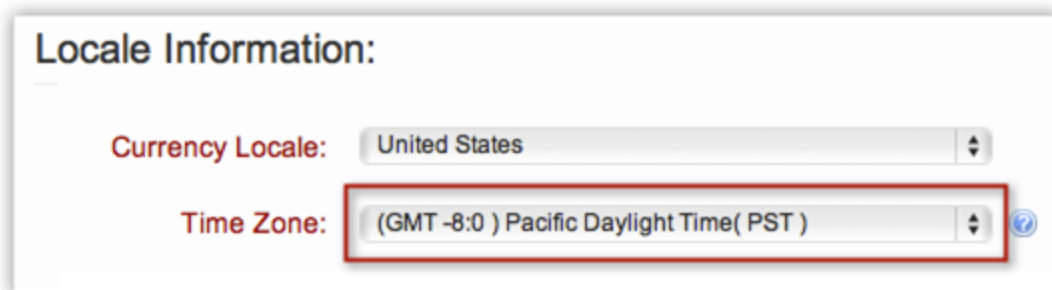
4. Under *Locale Information* section, select the country from the **Currency Locale** list.
5. Click **Save**.

Set Organization Time Zone

You can define a common time zone for your organization's SalesGrow CRM account. For Workflow Rules, a day will be calculated based on this time zone.

To set the organization's time zone

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Organization Settings** > **Company Details**.
3. In the *Company Details* page, click **Edit**.

Locale Information:

Currency Locale: United States

Time Zone: (GMT -8:0) Pacific Daylight Time(PST)

4. Under *Locale Information* section, select the **Time Zone** from the **drop-down** list.
5. Click **Save**.

Assign Super Administrator

The Super Administrator is the single point of contact for all communications regarding the transactions and bills from SalesGrow CRM. The organization's administrator has the privilege to change the super administrator as per the company's requirements.

To select super administrator

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Organization Settings** > **Company Details**.
3. In the *Company Details* page, click **Edit**.
4. Under *Company Details* section, select the **Super Admin** from the list.
5. Click **Save**.

Note

- Only the active users with the default Administrator profile in SalesGrow CRM can be selected as the Super Administrator in an organization.

5.2.4 Set up Fiscal Year

The fiscal year setting helps organizations to configure their fiscal cycle based on the selected start month. Once the fiscal start month is selected, fiscal quarters are automatically rolled up. By default, SalesGrow CRM's fiscal start month is set to January. You can specify the fiscal year name based on the start or the end month. For example, let's say your fiscal year starts in April 2010 and ends in March 2011.

- If you choose the fiscal year to be **based on the start month**, the year name will be displayed as 2010 (wherever applicable).
- If you choose the fiscal year to be **based on the end month**, the year name will be displayed as 2011.

To set up fiscal year

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Organization Settings** > **Fiscal Year**.

3. In the *Fiscal Year* page, select the **Fiscal Start Month** from the drop-down list.

Select Fiscal Start Month:

Fiscal Start Month : March

Display Fiscal Year Based on : ● Start Month
                                ○ End Month

Save

4. Choose **Start Month** or **End Month** to specify if the fiscal year name should be based on the start or the end month.
5. Click **Submit**.

Note

- The above instructions are followed to set the fiscal year for the first time. If you have already set the fiscal year but wish to update it now, the above mentioned instructions will not be applicable.
- To update the fiscal year after it has been set up, do the following:
    o Select the **Forecasts** module

o   Click **View Settings** > **Edit**

o   In the *Forecast Settings* Page, update the values as required.
o   Click **Save.**

6. Security Management

Managing the complexities of security administration is one of the growing concerns in any enterprise, especially those open to e-commerce and those with large networks. In such demanding times, the availability of Security Management is considered predominant – affecting all sectors of an enterprise.

The foundation of any security management is a model with role-based access control, enabling all the required functionality and authentication for a security system.

SalesGrow CRM provides a set of security features that defines permission to the data as well as the features of SalesGrow CRM. Administrators control these security options in the organization's account.

The role-based security ensures that data is accessible to users based on the organization's hierarchy. Profiles, on the other hand, ensure that users have permission to only the relevant

features in CRM - various modules, data administration tools. There is also Groups that allow you to extend the data-level access to other users with similar job profile.

6.1 Manage Users

Manage all the users in your SalesGrow CRM account, deactivate users who are no longer part of the company account.

6.1.1 Add Users

In the Free Edition, you can add upto 10 users. In the other Editions, the number of users that you can add is based on the user licenses purchased.

Availability

 Profile Permission Required: Users with the Manage Users permission in profile can access this feature.

Check Feature Availability and Limits

To add users

1. Log in to SalesGrow CRM with **Administrator** privileges.
   Users with *Manage Users* permission in the profile can also access this feature to add users.
2. Click **Setup** > **Users & Permissions** > **Users**.
3. In the *Users* page, click **Add New User**.

4. In the *Add New User* page, enter the following details:
   o **First Name** & **Last Name** - It is mandatory to enter the Last Name.

- o **Email** - Enter the user's valid email address that is not already used to create a SalesGrow CRM account.
  An invitation will be sent to this email address.
- o **Role**- Choose the role of the user in your organization.
- o **Profile** - Choose a profile that defines the access rights in SalesGrow CRM account for the user.
  You can add other details like phone numbers, address, photo, fax, website, date of birth, language, etc. after adding the user.

5. Click **Save**.
   The system sends an invitation to the user's email address. Only when the user accepts the invitation, will the status of the user change to *Confirmed*.
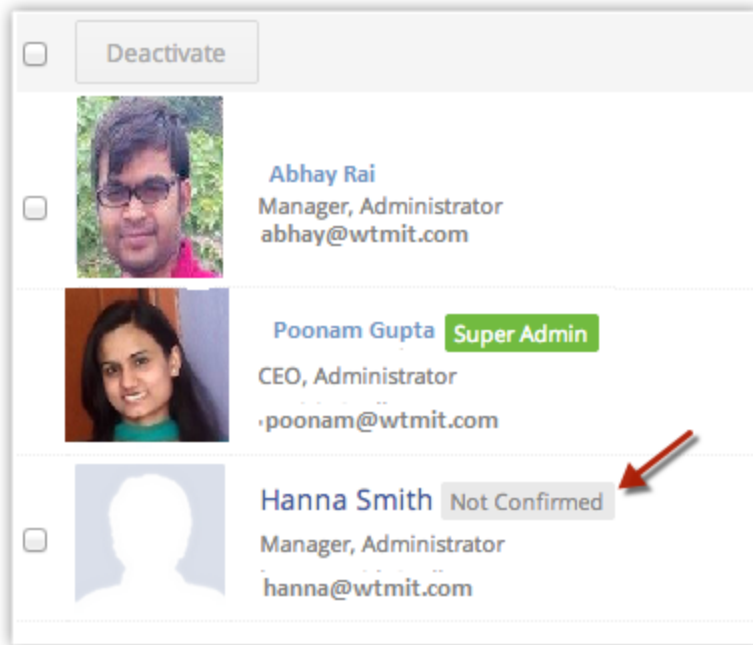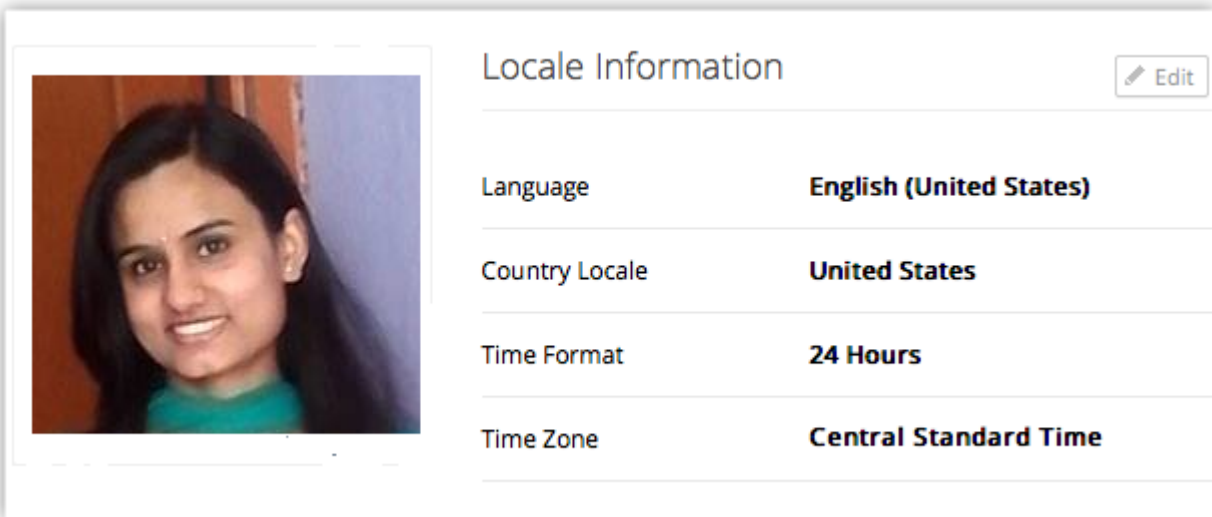
Modify Users

When you add a user, you will be specifying only the Name, Email address, Role and Profile details. You can add the other details of the user, such as, phone numbers, address, photo, fax, website, date of birth, language, etc. later whenever needed.

To modify a user's details

1. Click **Setup** > **Users & Permissions** > **Users**.
2. In *Users* page, click on the user from the list to modify the user details or add more information.
3. In *User's Details* page, click **Edit** for the corresponding section in which you want to modify the user's details. You can provide the following details:
   - o **Phone**, **Mobile**, **Website**, **Fax** & **Date of Birth** - Enter these details of the user.
   - o **Address Information** - Enter the full address details.
   - o **Language** - Select a language and it will be set as the language for the user's SalesGrow CRM account.

Locale Information — Edit

Language	English (United States)
Country Locale	United States
Time Format	24 Hours
Time Zone	Central Standard Time

- o **Country Locale**- Select your country from the list.
- o **Time Format** - Choose 12 hour or 24 hour time format.
- o **Time Zone** - The time zone that you select here will be the time set in your SalesGrow CRM account.
4. Click **Save**.

6.1.2 Re-Invite Users

When the users do not accept the invitation sent by the Administrator within 7 days, the Administrator can resend the invitation to the user. Users who have not accepted the invitation to join the organization's CRM account will be listed under *Unconfirmed Users*. You can send an invite again only to the unconfirmed users. If the user is deactivated, you need to activate them.

To re-invite a user

1. Log in to SalesGrow CRM with **Administrator** privileges.
2. Click **Setup** > **Users & Permissions** > **Users**.
3. In the *Users* page, point your mouse to the user and click the Settings icon. Click Re-invite. Alternatively, you can also go to the **Unconfirmed Users** view and select the user to re-invite. An invitation email will be sent to the user's email address.
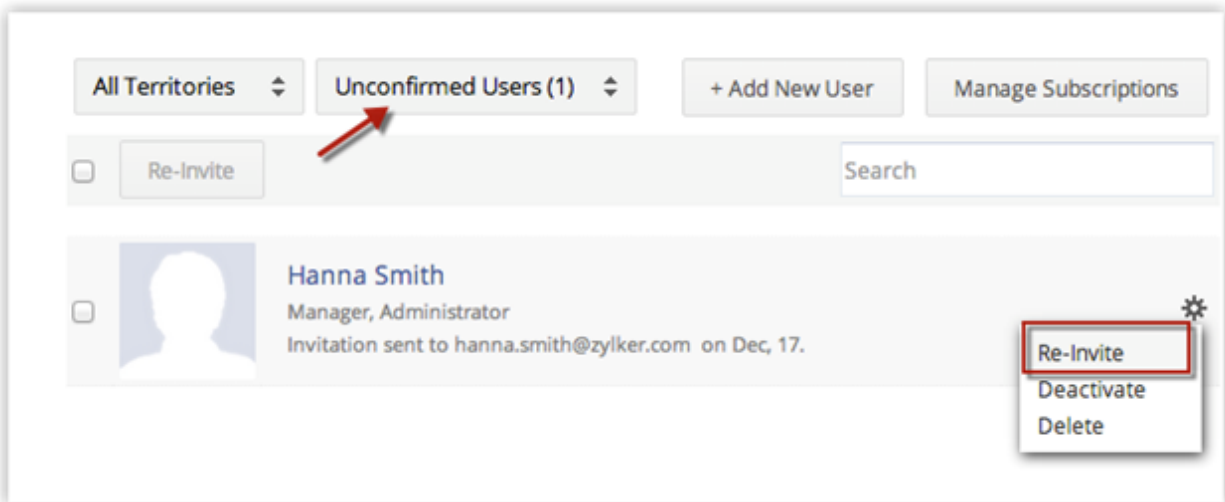
6.1.3 Activate/Deactivate Users

Sometimes in your organization, the users' hierarchical status may change or they may move to different business units. In such cases, you might have to deactivate those users after transferring ownership of the records to other users. Note that deactivating a user is different from deleting a user. When you deactivate a user:

- The user will no longer be able to access the CRM account.
- No one will be able to log into the service using the deactivated ID.
- You are free to use the same user license to add another user.
- The user license is not canceled. You will be billed for the number of user licenses that you had bought.
- The user will be listed under **Deactivated Users**.
- If you decide to activate the user again, you can re-invite the deactivated user.

To deactivate a user

1. Log in to the SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Users & Permissions** > **Users**.
3. In the *Users* page, select the Active Users view. Point your mouse to the user you wish to deactivate and click the **Settings** icon. Click **Deactivate**.
   The user will be deactivated and a system generated email will be sent to the corresponding user.

To activate a user

1. Log in to the SalesGrow CRM with Administrator privileges.
2. Click **Setup Users & Permissions** > **Users**.
3. In the *Users* page, select the **Inactive Users** view.
4. Move your mouse pointer to the user that you want to activate and click the **Settings** icon. Click **Activate.**
   The user will be activated and a system generated email will be sent to the corresponding user.
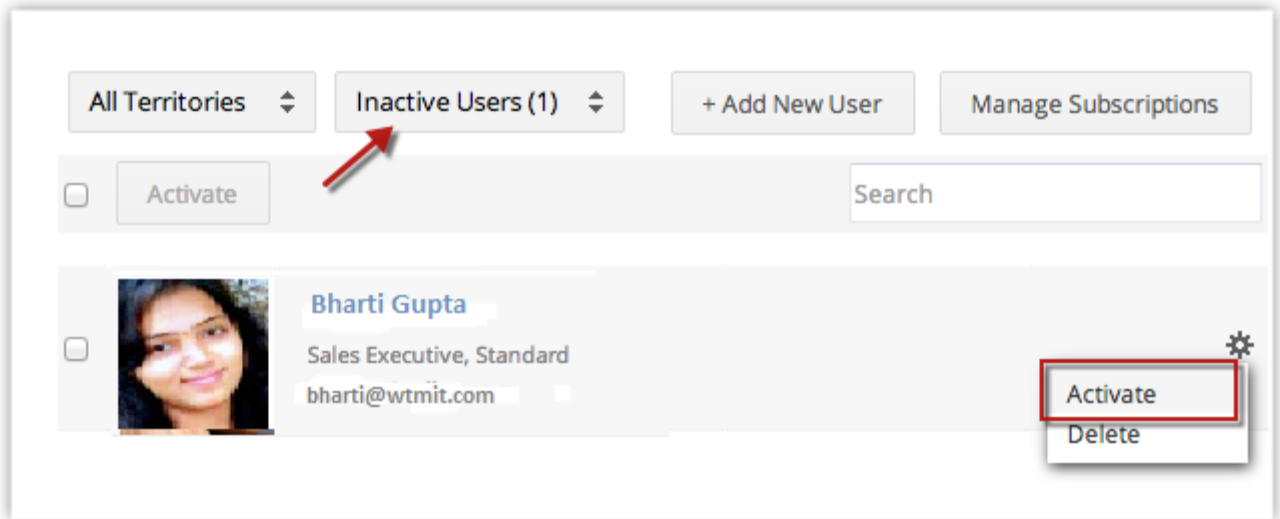
Note

- Only active users are counted towards user licenses.

6.1.4 Delete Users Accounts

You can also close your SalesGrow account, if you do not want to use any of the SalesGrow services.

Important Note:

- On closing your account, you will not be able to access our SalesGrow Services.
- Before closing, please ensure that you have exported all your data from the SalesGrow CRM system and also from the other SalesGrow services.
- Once you close your account, all of your data within SalesGrow services will be deleted immediately and cannot be restored in future.

6.2 Manage Profiles

Create profiles that define the access permissions for the users. Set module-level and feature-level permissions for different profiles.

6.2.1 Create Profiles

While creating a profile, first you have to associate the existing profile to the new profile and later you can change the modules and field-level access control. The table below provides information on the default profiles and the additional profiles for the different Editions.
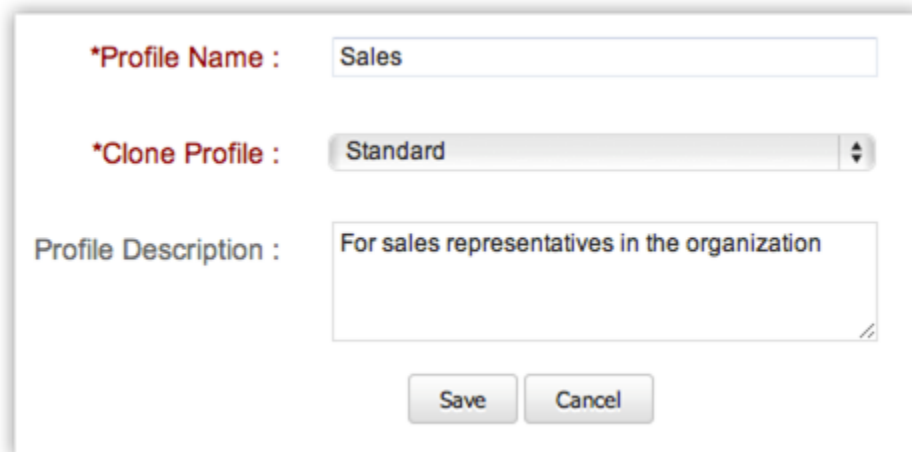
Cloning a Profile

A profile has the following categories of permissions:

- **Module level:** Enable or disable the access to modules (tabs).
- **Record-level:** Enable or disable permissions to View, Create, Edit, and Delete records.
- **Feature-level:** Enable or disable permission to access features, such as Import, Export, Mass Mail, Mass Update, Mass Transfer etc, to the users associated to the profiles.
- **Field-level:** Enable or disable permission to access the fields in a record. In addition you can restrict the access to edit the fields.

To create a new profile

1. Click **Setup** > **Users & Permissions** > **Profiles**.
2. In the *Profiles* page, click **Create Profile**.
3. In the *New Profile* page, do the following:
   o Enter the **Profile Name**.

   o Select an existing profile from the **Clone Profile** fields.
      The new profile will be cloned. Later you can modify the access control for the new profile.
   o Enter the **Profile Description**.
4. Click **Save**. Once you have cloned the profile, you can make the changes to the various permissions.

Note

- You can create profiles only if you have **more than one user** in your SalesGrow CRM account.

6.2.2 Control Permissions

After creating a profile, you must control the access to the modules (Leads, Accounts, Contacts, Potentials, Cases, Solutions, Products, Price Books, Tasks, Events, Forecasts, Vendors, Purchase Orders,

Sales Orders, Invoices and also Notes and Attachments), import/export, tools, report access, system administration, and general permissions for the profile. Users with System Administrator privileges can manage these permissions.

General permissions:

- **Tab Visibility:** Permission to allow or restrict access to the modules (tabs)
- **View:** Permission to view the records in module
- **Create:** Permission to create the record in module
- **Edit:** Permission to modify the record in module
- **Delete:** Permission to delete the records in module

Profile Details:

Profile Name:	Sales
Profile Description:	For sales representatives in the organization
Created By:	Tricia Mon, 11/07/2011 12:47:33 PM
Modified By:	Tricia Mon, 11/07/2011 12:47:33 PM

Module-level Permissions:

Entity	Tab Visible	View	Create	Edit	Delete
Home	●				
Leads	●	●	●	●	●
Accounts	●	●	●	●	●
Contacts	●	●	●	●	●
Potentials	●	●	●	●	●
Campaigns	●	●	●	●	●
Reports	●				
Dashboards	●				
Notes	●	●	●	●	●
Forecasts	●	●	●	●	●

List of Permissions

Sections	Description

Module-level Permissions	To enable/disable the following permissions to the various modules (Leads, Accounts, Contacts, Cases, and others) and the records in them. • Tab Visible • View • Create • Edit • Delete
Tab Group Permissions	To provide access to the tab groups. Users will be able to access the tabs within the tab groups based on the Module-level Permissions.
Reports & Dashboards Permissions	Permissions to manage the reports and dashboards in SalesGrow CRM and also to schedule reports.
Import Permissions	Various permissions required to import records from each module that are owned by you and organization-wide users.
Export Permission	Various permissions required to export records from each module.
Tool Permissions	Permissions required to use various features under *Module Tools* such as the Mass Transfer, Mass Delete, Mass Email, Change Owner etc.
Admin Permissions	Permissions to access the features such as Roles, Profiles, Users, Groups, SalesGrow CRM Customization etc.
General Permissions	Other general permissions to access the variety of featured in SalesGrow CRM, such as Convert Leads, Manage Subscription, Manage Workflow, Manage Custom Views, etc.

To control permissions

1. Click **Setup** > **Users & Permissions** > **Profiles**.
2. In the *Profiles* page, click the **Edit** link corresponding to the profile that you want to modify.
3. In the *Profile Information* page, specify the access permissions for the following:
   - Module-level Permissions
   - Tab Group Permissions
   - Reports & Dashboards Permissions
   - Import Permissions
   - Export Permissions
   - Tool Permissions
   - Admin Permissions
   - Apps Permissions
   - General Permission
4. Click **Save**.

Note

- You cannot edit the default profiles, **Administrator** and **Standard**. These are provided only for your reference.
  It is strongly recommended to define your own profiles based on the existing default profiles.

6.2.3 Associate Users

You can associate the profile with the users so that they can access CRM modules and fields that are assigned to them. Users with System Administrator privileges can associate a profile with users.
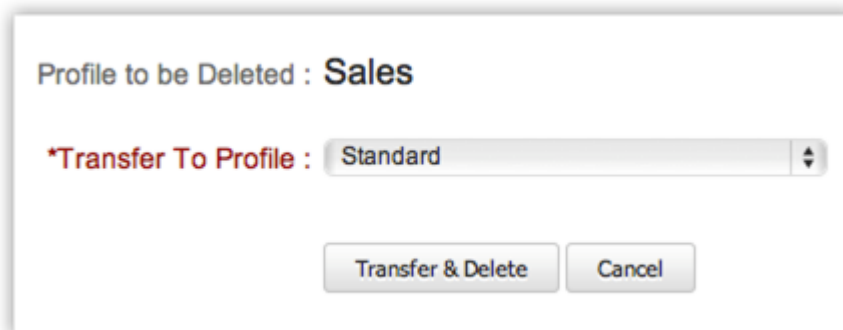
To associate users with a profile

1. Click **Setup** > **Users & Permissions** > **Users**.
2. In the *Users* page, click the <User Name>.
3. In the *User Details* page, click **Edit**.
4. In the *User Details* page, select the **Profile** from the pick list.
5. Click **Save**.

Deleting Profiles

When organizing your SalesGrow CRM account, you may delete some of the unwanted profiles after assigning the users to the other profiles. Before deleting a particular profile, Users associated to that profile must be transferred to other existing profiles. You can delete all the profiles except "System Administrator" and "Standard User" profiles.

To delete a profile

1. Click **Setup** > **Users & Permissions** > **Profiles**.
2. In the *Profiles* page, click the **Del** link for the specific profile.
3. In the *Delete Profile* page, transfer the existing users to the new profile.

Profile to be Deleted : **Sales**

*Transfer To Profile : Standard

Transfer & Delete   Cancel

4. Click **Transfer & Delete**.
    The profile will be permanently deleted.

6.3 Manage Roles

Create roles for the users in your account such as CEO, Sales Manager, Marketing Manager etc.
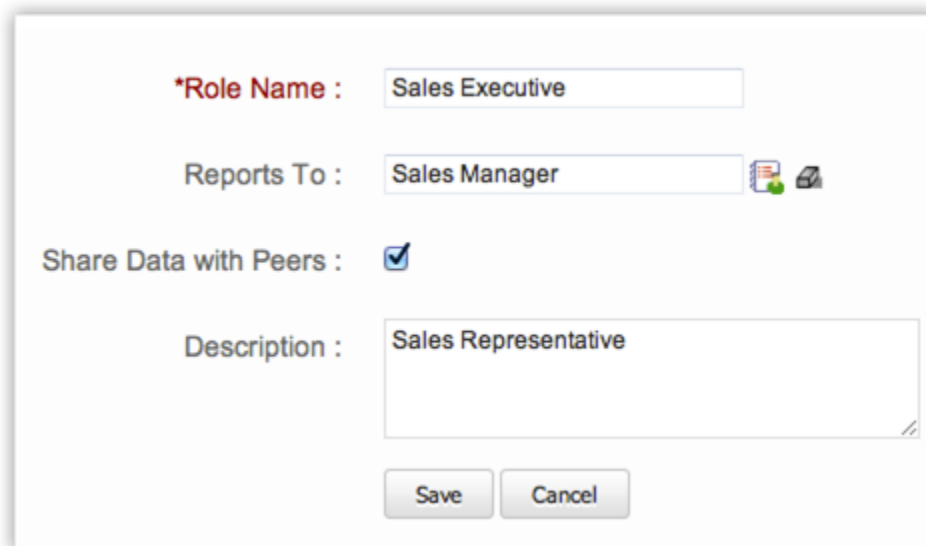
6.3.1 Create Roles

By default, the CEO and Manager roles are enabled for your SalesGrow CRM paid account. In addition, you can create different types of roles for users based on their position in your organization hierarchy and the type of your SalesGrow CRM Edition.

Note

- A user with an **Administrator profile** will have access to all the data irrespective of the role assigned to the user.

To create new roles

1. Click **Setup** > **Users & Permissions** > **Roles**.
2. In the *Roles* page, click **New Role**.
3. In the *New Role* page, do the following:
   - Enter the **Role Name**. Do not add a role with the same name.

   - Select the immediate superior's role from the **Reports To** lookup.
     If you do not select the superior's role, the new role will be created under the CEO role.
   - Select the **Share Data with Peers** check box if you would like to enable access rights to peers.
   - Specify the **Description** for the role.
4. Click **Save**.

Note

- You can create roles only if you have **more than one user** in your SalesGrow CRM account.

6.3.2 Assign Roles

After creating roles, you can assign them to the users in your organization. A user with an **Administrator profile** will have access to all the data irrespective of the role assigned to the user.

To assign roles to the users

1. Click **Setup** > **Users & Permissions** > **Users**.
2. In the *Users* page, click the <User Name>.
3. In the *User Details* page, click **Edit**.
4. Select the specific **Role** from the lookup box.
5. Click **Save**.

Edit Roles

You can modify the user roles as per changes in your organizational hierarchy. As part of the modification of the roles, you can perform the following:

- Rename the role
- Change the Superior Role
- Change the setting for sharing data with Peers

While changing the role names, all the data sharing rules will be updated automatically. So you don't need to calculate the data sharing rules or update the user details.

- A user with an **Administrator profile** will have access to all the data irrespective of the role assigned to the user
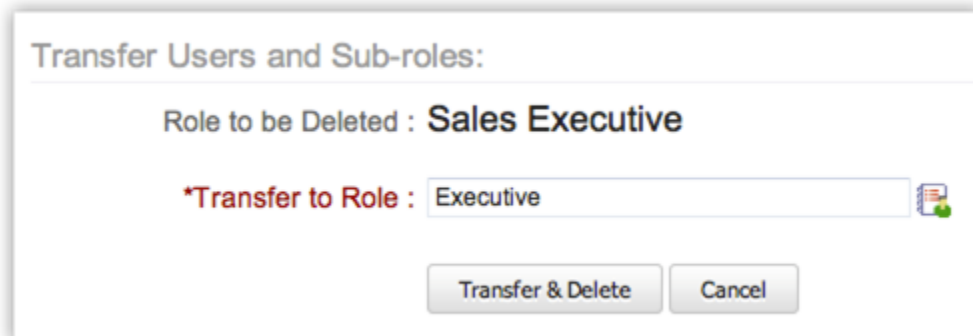
To edit a Role

1. Click **Setup** > **Users & Permissions** > **Roles**.
2. In the *Roles List*, click the **Role** name.
3. In the *Role Details* page, click **Edit**.
4. In the *Edit Role* page, update the new properties for the role.
5. Click **Save**.

Delete Roles

You cannot delete the existing roles without transferring the users to a new role.

To delete a Role

1. Click **Setup** > **Users & Permissions** > **Roles**.
2. In the *Roles* page, click the **Role** name.
3. In the *Role* Details page, click **Delete**.
4. In the *Delete Role* page, click on an existing Role to transfer the child-roles to the selected role.

5. Click **Transfer & Delete**.
   Now the role and child-roles are transferred to the new role and a different organization hierarchy is created.

6.4 Territory Management

Segment customer accounts based on account characterists such as, products or services, expected revenue, zip code/region, or industry, rather than record ownership.

6.4.1 Create Territories

Understanding Territory Management

- Using Territory Management, you can segment accounts, contacts and potentials into territories.
- You can build a territory hierarchy by creating territories and sub territories. You can define criteria for each of these territories and based on the criteria, records will be assigned to the territories.
- Based on the territory criteria, when a record is created or modified, territories are automatically assigned to the records.
- A record will not be assigned to a sub territory unless it meets the criteria of the parent territory.
- An account or contact can be assigned to a maximum of ten territories. Whereas, a potential can be assigned to only one territory.
- Each territory can have a manager who can:
    - Create forecasts for the users in the territory.
    - Provide permissions for the users in the territory.
- Territory managers will always have the Read and Write permissions for their territories.
- Territories are automatically assigned for the records. If required, the territory managers can manually assign records to their territories and sub territories. Also, users with administrator profile can assign territories to records.
- Multiple forecasts can be created for a user. Users cannot create forecast for themselves. Only the manager can create it for the users.
- You can disable territory management based on your business needs. If you enable the feature again, the territory structure will remain unchanged.

Permissions to Access Records in a Territory

With Territory Management, the following criteria determines who can access the records in a territory.

- The module-level permissions in profiles.
- The permissions set for users in a territory.

Users can edit records in their territory only if:

- The user has the profile permission to edit records of the module.
- The territory to which the record belongs provides Read-Write-Delete permissions to its users.
- The user is the manager of the territory to which the record belongs.

Note

- Users will have full access to the records they own.
- Child records will have the same permissions as that of the parent record.
- Users with the Administrator profile will have full access to all the records.

Various Roles and Responsibilities

Role	Responsibility

Administrators	• Activate/Deactivate territory management. • Create territories. • Add/Remove users in a territory. • Manually assign territories to records, if required.
Territory Managers	• Create sub territories for their territories. • Add/Remove users in the territory. • Set up forecast targets for their territories. • Manually change the territory for accounts, contacts and potentials.
Territory Members (Read-only Permission)	• View accounts, contacts, and potentials • View sales forecast of the territory
Territory Members (Read-write Permission)	• Create or modify accounts, contacts and potentials • View sales forecast of the territory
Owner of CRM Records	• Can perform all functions as per the profile-level permissions.

Enable Territory Management

Before you enable Territory Management for your organization's account, please make sure that you have read our Decision Guide for Territory Management. While enabling this feature, you have two options:
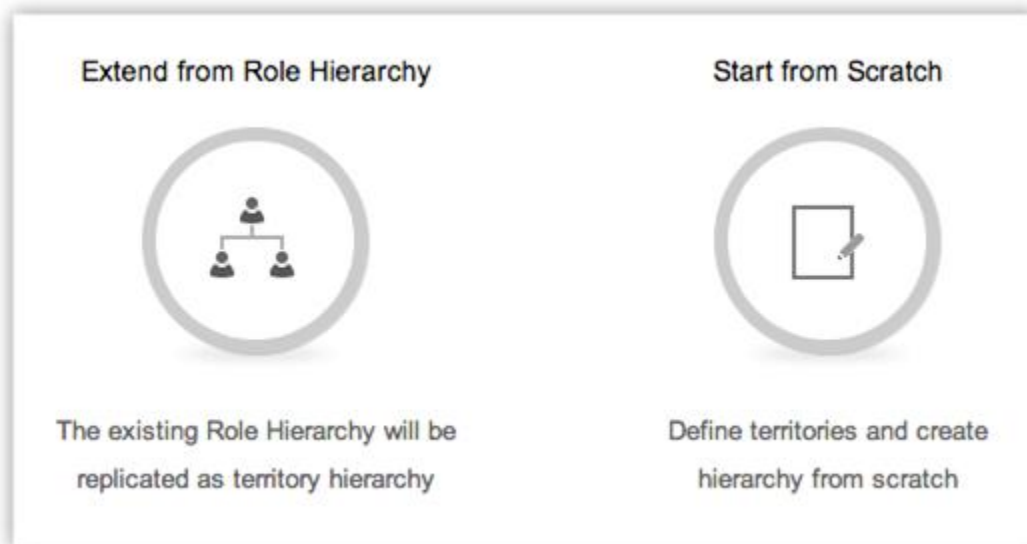
Build territory hierarchy from scratch - Using this option, you can create territory hierarchy from scratch.

Extend your territory hierarchy from role hierarchy - Using this option, you can replicate the hierarchy from Roles to Territories. All the users in a role will be added as user in the territory. The role managers (in the new role hierarchy) will be transferred as territory managers. You may later have to change the territory hierarchy as per you business needs.

It is important to note that you can either build territory hierarchy from scratch or extend your role hierarchy to territory hierarchy. Once the option is chosen, you cannot go back to the other option.

Once territory management is enabled:

- All the accounts, contacts and potentials will have an additional field, **Territories**.

- In the Accounts, Contacts, Potentials home page, a drop-down will be available with the territories that you create.
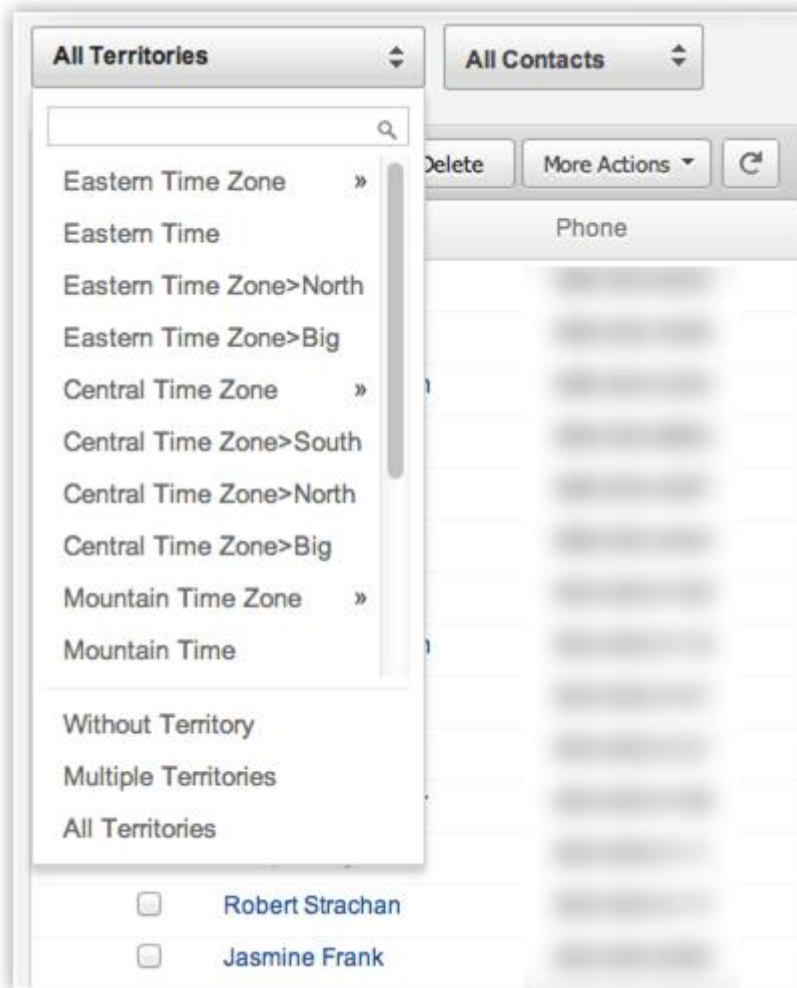
- You will have the option to create forecasts based on territory hierarchy. Users belonging to multiple territories can have multiple forecast targets set for each territory.

Create Forecast

WTM L.T.D ⇕   Q4 ⇕   2013 ⇕

Target Amount

30000 ⓘ

Target for Sub Territories

Territory Name	Territory Target	Manager Target
America - Charles Stone	16000 ⓘ	2000 ⓘ
APAC - Nathan Brooks	14000 ⓘ	2000 ⓘ

Save   Cancel

To enable territory management

1. Click **Setup** > **Territory Management** > **Territories**.
2. Click **Get Started**. You will have the following options to create a territory hierarchy.
   - **Extend from Role Hierarchy** - Click to replicate the hierarchy from roles to territories.
   - **Start from Scratch** - Click to create territory hierarchy from scratch.

Enable Potential Rule for Territories

Creating a territory requires you to specify criteria based on which territories are assigned to accounts. With Potential Rule enabled, you can specify criteria based on which territories are assigned to potentials. Once you enable the Potentials Rule, whenever you create a territory or edit an existing one, the option to add Potential Rule will be available.

You can disable the Potential Rule any time. On disabling, the potentials will be automatically reassigned to the territories based on the associated account's territory. When you enable again, potentials will be automatically assigned to territories based on the Potential Rules.

To enable or disable potential rule

1. Click **Setup** > **Territory Management** > **Territories**.
2. Click the **View Settings** link.
3. In the *Territory Settings* popup, click the **Enable**/**Disable** link.

Create Territories

Users with the Administrator profile can create territories. Territory managers also have the default privilege to create sub territories for their territories.

To create a territory

1. Click **Setup** > **Territory Management** > **Territories**.
2. Click **New Territory**.
3. In the *Create Territory* page, specify the following:
    o Specify a **Name** for the territory.
    o Choose a **Territory Manager** from the drop-down list.

o Choose a **Parent Territory** from the lookup.

o Search and add **Users** and allot **Permission**s.
These users will have access to the records assigned to this territory. All the users can have the same permission for the records, either **Read Only** or **Read/Write/Delete**.
o Under **Account Rule**, specify criteria for accounts.
Based on this rule criteria, territories will be assigned to accounts in SalesGrow CRM.
o Under **Potential Rule**, specify criteria for potentials. This options will be available only if it is enabled under *Settings*.
o Based on this rule criteria, territories will be assigned to potentials in SalesGrow CRM.

        o   Enter **Description**.
   4. Click **Create**.

Create Sub Territories

Under each territory, you can create sub territories. In case a sub territory does not have a manager, the parent territory's manager administers the sub territories.

To create a sub territory

   1. Click **Setup** > **Territory Management** > **Territories**.

2. In the **Territory Hierarchy** page, move your mouse pointer to a territory and click on the **Create Child Territory** icon.
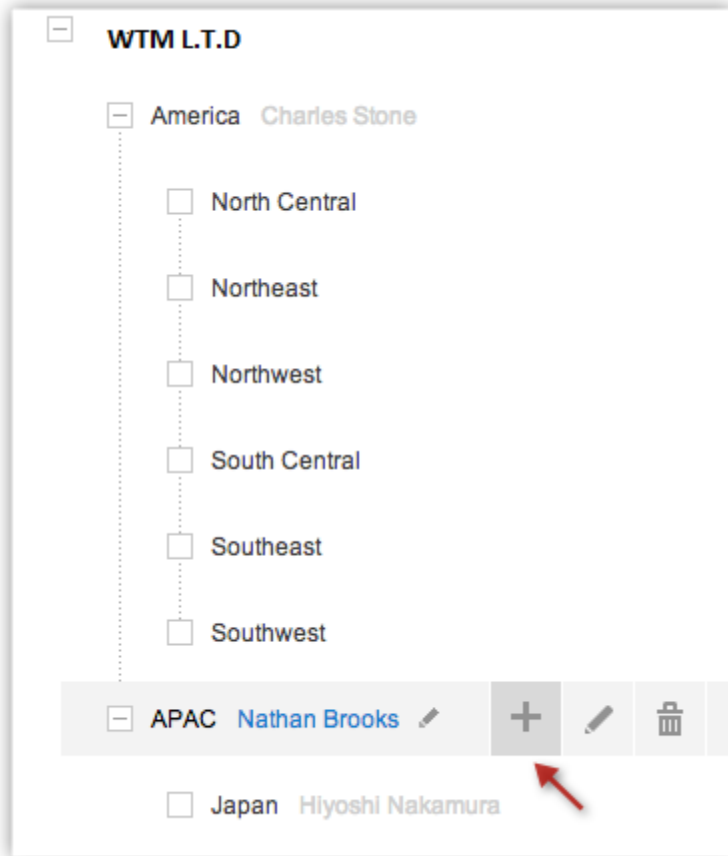
3. In the *Create Territory* page, specify details. Refer to the steps in **Create Territory**.

Delete Territories

When you delete a territory:

- You lose the territory details forever.
- You will be prompted to transfer the sub territories to another parent territory in the hierarchy.
- The forecast created for the current and previous quarters/months will remain.

To delete a territory

1. Click **Setup** > **Territory Management** > **Territories**.

2. In the **Territory Hierarchy** page, move your mouse pointer to a territory and click on the **Delete** icon.

Manage Forecasts

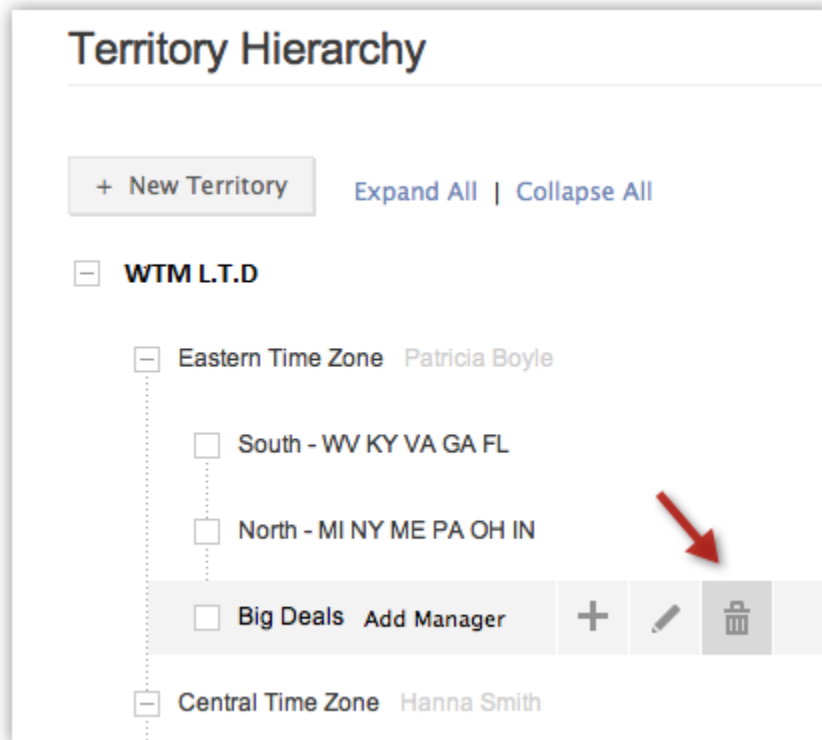When you enable territory management, you can configure the organization's forecast settings and begin creating forecasts every quarter/month.

To configure organization's forecast settings (after enabling territory management)

1. In the **Forecast** module, click **Get Started**.
2. In the *Forecast Settings* page, select the **Target Period** as Monthly or Quarterly.
3. Choose the **Fiscal Start Month** from the drop-down list.
4. Select **Start Month** or **End Month**. Based on your selection, the year will be displayed in the forecasts.
   For example, your fiscal year is from April to March. You select the End Month option for the financial year 2013-2014. The year in the forecast will be mentioned as 2014.
5. Select the **Target Field**, and click **Save**.
   You will be asked to confirm the settings after which you can start creating forecasts for users.

Disable Territory Management

You can disable territory management. On disabling this feature the following will not be accessible:

- The information related to territories in the Accounts, Contacts and Potentials modules.

- The existing forecasts based on territory hierarchy. It will be deleted permanently. You will be able to create forecasts based on role hierarchy.

To disable territory management

1. Click **Setup** > **Territory Management** > **Territories**.
2. Click **Disable Territory Management**.
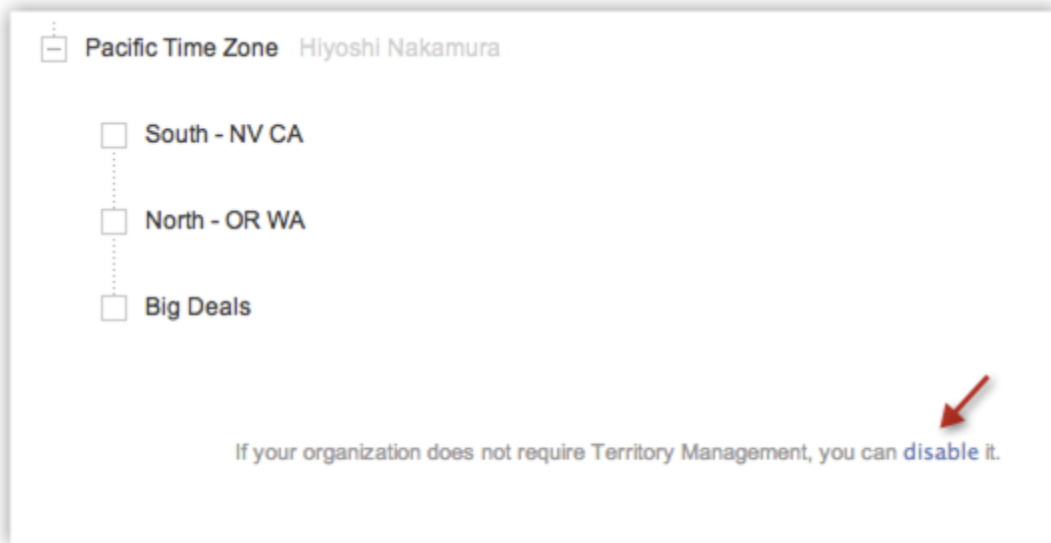
6.4.2 Assign Territories

How are Territories Assigned?

Automatically

- Territories are automatically assigned to accounts, contacts and potentials when they are created or modified.
- When a record meets the criteria of a territory, only then is it validated for its sub territories.
- If a record does not meet the criteria, it will be validated for the next territory of the same level in the hierarchy.
- When a record satisfies the criteria of a territory, it will be assigned to that territory and SalesGrow CRM will further move on to check if the record meets the criteria of the other territories and sub territories in the hierarchy.

- For example, take the following territory hierarchy:
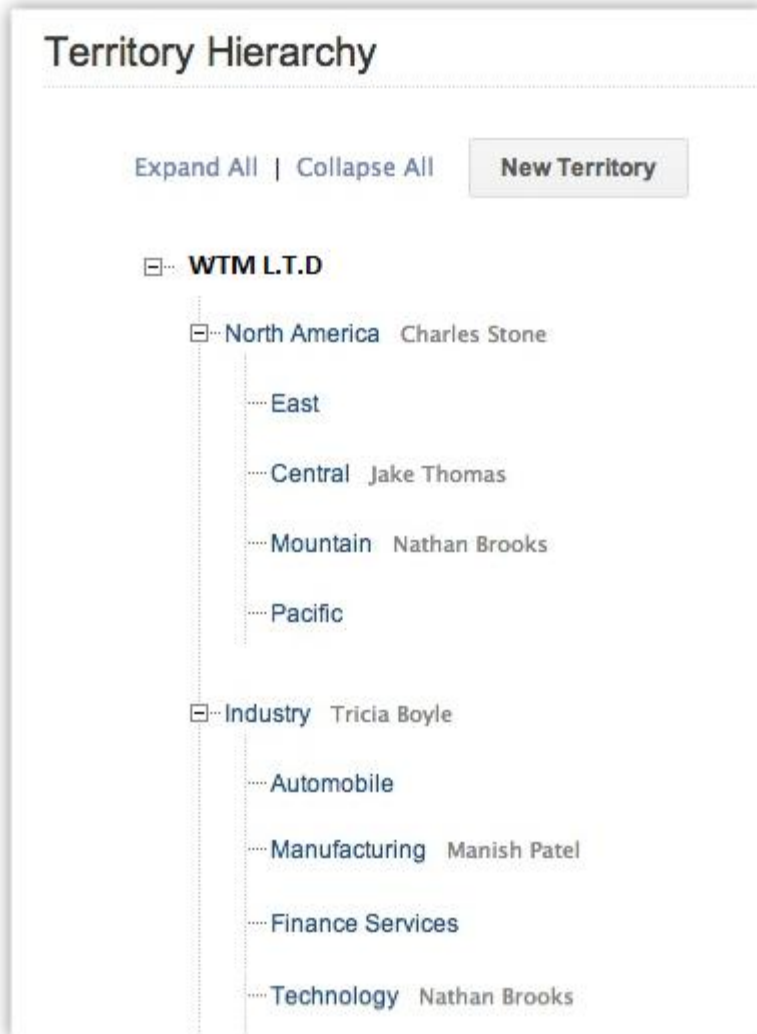
In the example:
  - o If the record meets the criteria for North America and also for its sub territory, Central then the record will have Central territory assigned to it. Please note that both the territories, North America and Central, will not be assigned to the records.
  - o If the record meets the criteria for Zillum, but does not satisfy the criteria for other territories in the hierarchy, then only Zillum will be assigned to the record.

Manually

- Territory managers can manually assign records to their territories and sub territories.
- Users with Administrator profile can also manually assign territories to records.

- Territories that are manually added can only be removed manually. Automatically assigned territories cannot be removed manually.

Territory Assignment for Accounts

Here are some scenarios:

Scenarios	What will happen?
Record meets the criteria of a single territory.	The record will be assigned to the territory.
Record meets the criteria of multiple territories.	The record is assigned to all those territories.
Record does not meet the criteria of a parent territory but meets the criteria of its sub territory.	Neither the parent territory nor the sub territory will be assigned to the record.
Record does not satisfy the criteria of any territory.	No territory will be assigned to the record.

A maximum of ten territories can be assigned to an account. Here are some use cases and the consequence

Territory Assignment for Contacts

Here are some scenarios:

Scenarios	What will happen?
An account is not associated to the	Territory will not be assigned to the contact.

contact.	
The account associated to the contact does not have a territory.	Territory will not be assigned to the contact.
The account associated to the contact has a single territory.	The account's territory will be assigned to the contact.
The account associated to the contact has multiple territories.	Territories will be assigned based on the following criteria for: 1. The contact owner is part of any one territory of the account. 2. The contact owner is the territory manager of any one territory of the account. 3. The contact creator is part of any one territory of the account. 4. The contact creator is the territory manager of any one territory of the account.

- A maximum of ten territories can be assigned to a contact of which only one territory can be automatically assigned based on the account associated to the contact. For more details, refer to the Assignment of Accounts table.
- With the above use cases, if the system does not determine a single territory then territory will not be assigned to the contact.

Territory Assignment for Potentials (Opportunities)

Territories are assigned to potentials based on Potential Rules.

For various territories and sub territories you may have created potential rules. Two factors are taken into consideration in determining the potential rule that will be applied to a potential record. They are:

Contact associated to the Potential - If the contact associated to the potential has a territory assigned to it, CRM will check for Potential Rules in that territory. If there are sub territories,

- The system will check the first level territories for Potential Rule. If none exists, it will skip to the second level and check. The system will not check further if no Potential Rule is available in the second level as well.
- When the Potential Rules exists in the first level territory in the hierarchy, but the record does not satisfy the criteria, then the system will not check the second level.

Account associated to the Potential - If the contact associated to the potential does not have a territory assigned to it, CRM will check for the Account associated to the potential and check the account's territory for Potential Rules. If there are sub territories,

This method will also be followed when:

- A potential does not satisfy the criteria of the territories with Potential Rules.
- With the previous method, if more than one territory matches the potential.
- A potential does not meet the criteria in the Potential Rule of the first level of hierarchy.
- The first as well as the second level of territory in the hierarchy does not have a potential rule.

Also, territories will be reassigned to potentials, if the associated account or contact is modified. Here are some business scenarios:

Scenarios - Contacts	What will happen?
An account or contact is not associated to the potential.	Territory will not be assigned to the potential.
The contact associated to the potential has a single territory.	The contact's territory will be assigned to the potential.
The contact associated to the potential has multiple territories.	Territories will be assigned based on the following criteria for: 1. The potential owner is part of any one territory of the contact. 2. The potential owner is the territory manager of any one territory of the contact. 3. The potential creator is part of any one territory of the contact. 4. The potential creator is the territory manager of any one territory of the contact.

Scenarios - Accounts	What will happen?
The account associated to the potential has a single territory.	The account's territory will be assigned to the potential.
The account associated to the potential has multiple territories.	Territories will be assigned based on the following criteria for: 1. The potential owner is part of any one territory of the account. 2. The potential owner is the territory manager of any one territory of the account. 3. The potential creator is part of any one territory of the account. 4. The potential creator is the territory manager of any one territory of the account.

- Only one territory can be assigned to a potential.
- With the above use cases, if the system does not determine a single territory then territory will not be assigned to the potential. Also, note that if a territory is manually assigned to a record, the territories will not be assigned automatically based on the use cases mentioned above.

Territory Reassignment When Records Are Modified

For accounts, the associated child records are contacts and potential. When an account is modified and falls into another territory, the associated contact and potential may also be reassigned to a different territory. The following table will provide details on the various use cases when the parent record is modified.

Here are some business scenarios:

Parent records that are modified	What will happen to the associated records?
A record that was part of two or more territories is now reassigned to a new territory.	Records will be reassigned to the new single territory.
A record that was assigned to only one territory is now assigned to additional territories.	Records will remain assigned to the parent record's territory. It will not be assigned to the new additional territories.
A record that was assigned to only one territory is now reassigned to new territories.	Records will not be assigned to the new territories. The associated records will not be part of any territory.
A record that was assigned to more than one territory is now assigned to additional territories.	Records will remain assigned to the parent record's territories. It will not be assigned to the new additional territories.
A record that was assigned to more than one territory is now reassigned to new territories.	Records will not be assigned to the new territories. The associated records will not be part of any territory.

Run Rules to Assign Territories Automatically

When the territory's assignment rules are run, records that meet the rule criteria in the territory will automatically be assigned to the territory. Initially, when you go to **Setup** > **Territory Management** > **Assign Territories** in your SalesGrow CRM account, you need to run the rules for the existing accounts. Based on the account's territories, the associated contacts and potentials will also be assigned to territories. If you enable Potential Rules, you can run rules for potentials as well.

You can look up records and assign them to territories using one of the three options listed below:

- **By Territory** - Records from the selected territories will be listed. You can select the records and assign them to territories.
- **By Custom View** - When you have the records sorted using list views, it is easier to view and assign them to the appropriate territories.

- **Apply my own criteria** - When both the options above do not serve the purpose, you can always define a set of criteria to filter records. This option, allows you to modify the set of criteria using the **Change Pattern** option.

To search records and assign to territories

1. Click **Setup** > **Territory Management** > **Assign Territories**.
2. Choose Accounts or Potentials from the drop-down.
3. Choose one of the following from the drop-down:
   - **Territory** - Select the territory and sub-territories from the drop-down list.
   - **Custom View** - Select the list view from the drop-down list.
   - **My own criteria** - Specify a set of criteria to filter records.
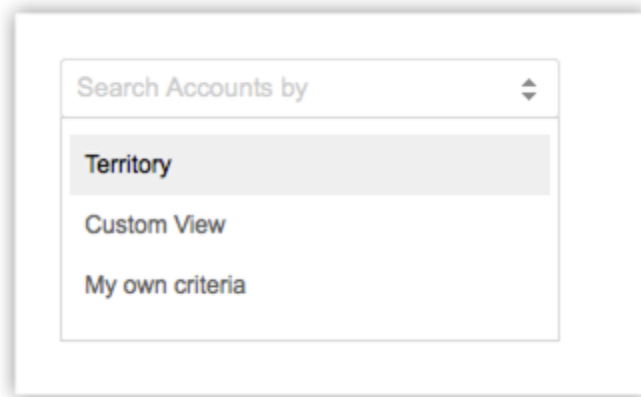
4. Review the matching results that are listed and click **Run Rules**.
   Records will be assigned to various territories based on the territory rules. You will receive a confirmation email when the process of assigning territories is complete.

Note

- Territories that are manually added can only be removed manually. Automatically assigned territories cannot be removed manually.

6.4.3 Decision Guide

Introduction

Territory Management is a system by which customer accounts are grouped based on a defined set of criteria. This makes for easy sharing of customer accounts among sales teams in your company. In SalesGrow CRM, the territory management feature lets you:

- Create territories and specify criteria that defines a territory.
- Build a territory hierarchy in addition to the role hierarchy in your account.
- Access predefined reports on territories, such as, Star performers across territories, Overall Sales Cycle Duration among territories, Revenue By Territories, etc.
- Create custom reports on territories.
- Set multiple forecast targets for users belonging to multiple territories.

Territory management need not be a requirement for every organization. You need to decide on the usage of territories for your organization's sales structure and data-sharing model. This document will guide you and help you decide if Territory Management is required for your company.
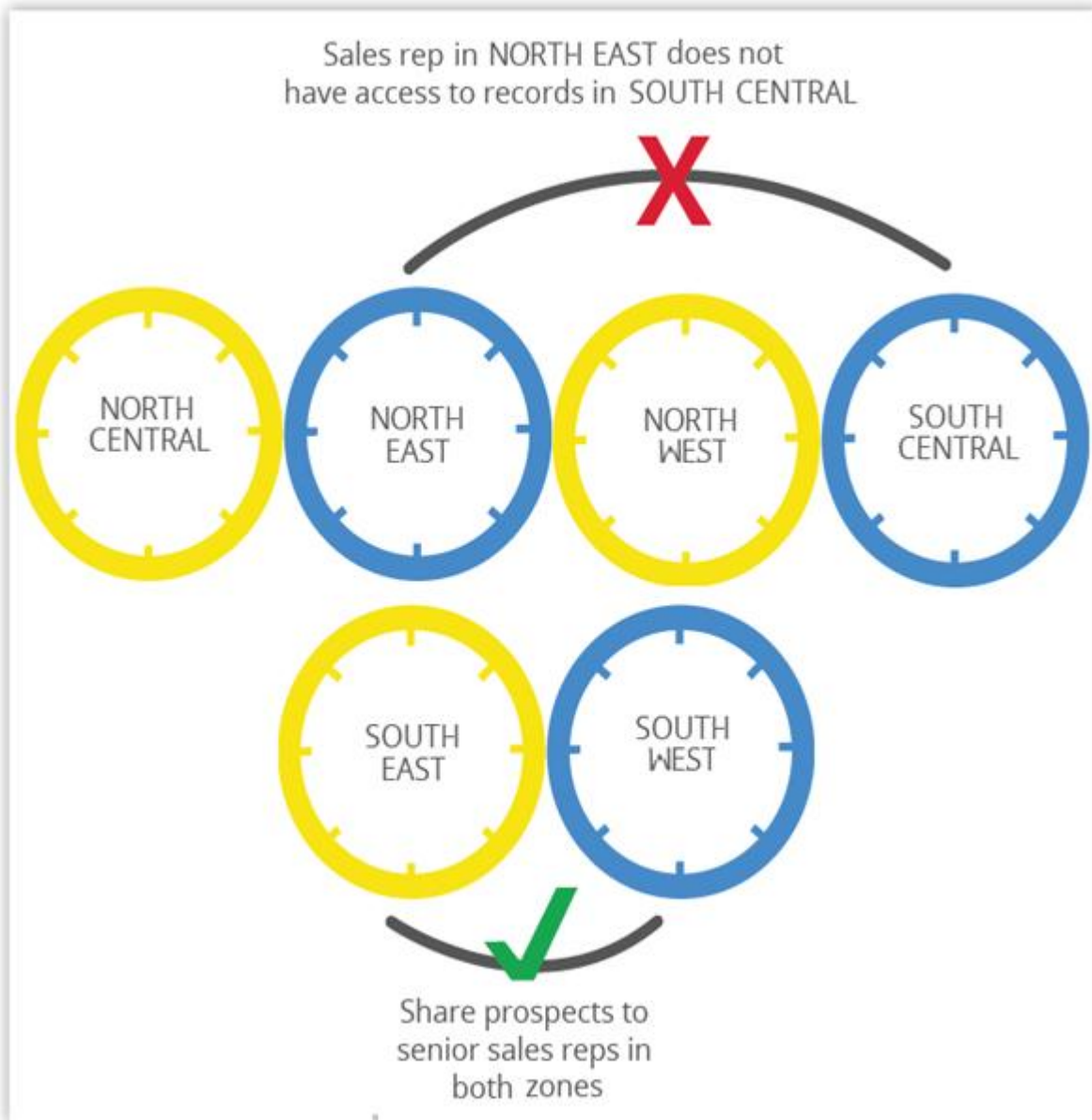
Role vs Territory

Let us first take a look at the advantages that territory management has to provide, when compared to roles.

Role Hierarchy	Territory Hierarchy
Record ownership is with one owner.	Record ownership is with one owner.
Record is accessible to: • Owner of the record • Users who are superior to the record owner in the role hierarchy • Users who have access granted based on the data sharing rules.	Record is accessible to: • Owner of the record • Users who are superior to the record owner in the role hierarchy • Other users in the record's territory • Users in the territories that are superior to record's territory.
Segment customer accounts based on the record ownership.	Segment customer accounts based on the account characteristics.
User can be assigned to only one role.	User can be assigned to multiple territories.
User can have a single forecast target only.	Users can have multiple forecasts targets, one for each territory that they belong.

Here is a business scenario to explain better!

Let us assume that the sales force in WTM Inc. comprises of six teams across the United States - North Central, North East, North West, South Central, South East and South West. In this sales structure,

Sales rep in NORTH EAST does not have access to records in SOUTH CENTRAL

NORTH CENTRAL   NORTH EAST   NORTH WEST   SOUTH CENTRAL

SOUTH EAST   SOUTH WEST

Share prospects to senior sales reps in both zones

- You do not want the sales team from any specific region to access the records of another region.
- There may be a few important prospects that you want to share with the senior sales reps from two different teams, in two regions.

It may become a complicated process to achieve this using roles and data sharing rules alone. On the other hand, with territories based on a defined set of criteria, you can extend the SalesGrow CRM data-sharing model in your SalesGrow CRM account and easily share records with various users in different teams. This will ensure that the teams are focused towards a goal to achieve the sales target set under the different times zones.

Before you plan to set up Territory Management in your SalesGrow CRM account, consider the following topics that will help you determine if Territory Management is suited to your organization.

- **Sales Structure and Sharing Needs** - A CRM data sharing structure, which requires individuals belonging to multiple territories to access multiple customer accounts.
- **Forecasting** - Forecasts based on territory hierarchy. The need to set forecasts targets for each territory a users belongs.
- **Administration** - Territories can be managed as individual units to reduce the burden on the administrators.

Sales Structure and Sharing Needs

How is your data shared with other users? It is crucial to analyze if the role-based hierarchy, data sharing rules, groups and assignment rules provide the best options to share accounts as per your sale structure. Your organization may have the need to share records based on the products or services, revenue, zip code/region, or industry, and not based on the record ownership. For such a complex and collaborative sharing model, you need territories that ensure effective grouping of customer accounts and sharing records with different sales teams.

Does the sales structure in your organization require you to share customer accounts with many people from different teams? Take this as an example: You have a ground sales representative who makes calls to the prospect and arranges for a meeting. You also have a field sales representative to visit the prospect for a demo of the product. How do you share accounts with both these sales reps?

An organization's sales structure may either be linear or a complex matrix, where data sharing is one to many. Territory Management will be right for your organization, if –

- Your company's sharing needs depend more on account's characteristics rather than the individual ownership of the records.
- Your organization has a matrix sales structure, which requires individuals belonging to multiple territories to access multiple customer accounts.
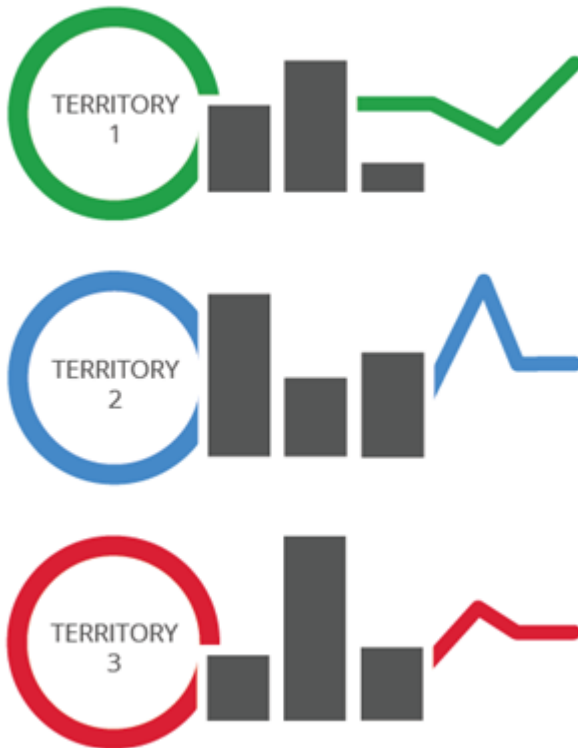
Forecasting

When you switch to Territory Management in SalesGrow CRM, forecasts will also change to suit the territory requirements. When a user is part of multiple territories you may need to set different sales targets for the user, as you will have different targets set for each territory.

Having a single forecast target for the user will not work then. By splitting your monthly/quarterly targets based on the territories and the customer accounts in them, you will have a clear picture of the sales forecast and the target to be achieved.

Administration

Does your administrator find it complicated to manage the numerous sharing rules that have to be monitored when there are changes in the sales structure? When there is a complex data sharing architecture, some of the challenges that you have to be aware of are:

Providing similar data access to multiple users, managing those permissions individually or on a role level for users, creating multiple sharing rules, maintaining huge data volume and monitoring frequent movement of sales reps to different sales groups.

Territories, on the other hand, are easier to manage. For example: Your sales structure is demarcated based on region. A sales executive who takes care of customer enquires that come from China is a star performer in your team. You decide to give this sales rep additional responsibility, to handle customers from Japan. In this example, territory management gives you the flexibility to add the user in China and

Japan sales territory to where the sales executive can access the customer records from both the countries.

When complex data sharing rules and role hierarchy do not meet the requirements, territories are a much easier option to maintain as individual units that will also reduce the burden on the administrators. Visualizing your organization's sales structure in a territorial hierarchy can help decide if Territory Management is the option for you.

Reasons to Use Territory Management!

Do you need to avoid uneven distribution of the customer accounts to enhance focused sales and team responsibilities?

Your sales reps may either have too much work or too little work. This could potentially lead to wasted resources and lost revenue. The workload needs to be properly distributed to give your existing customers and prospects the attention that they need.

Say your customer account segmentation range from small businesses to large corporations and the opportunities are handled by the sales people based on the deal size. In such a structure, use territories to divide your sales team and assign prospects by business size to gain flexibility over data visibility and sharing.

One group of sales reps can handle deals with maximum 50 licenses, another group can be assigned to deals with 50 plus licenses. In case of dynamic sales teams, having territories also facilitates easy movement of sales reps, as they may need to switch between territories.

Does your organization's business and data sharing model depend more on account's characteristics (geographical divisions, customer account's size, multiple products lines, industry, etc.) and less on the individual ownership?

Using territorial hierarchy is a big advantage as territories provide more flexibility over data visibility and sharing.

Let's say you sell furniture for schools in different districts. Each sales group takes care of sales in their respective school districts. Within each district there are numerous schools (pre schools, high schools, college) that would like to buy furniture. Depending on the district and the quantity of order placed, you assign the deal to your sales reps. Here, it's the account's characteristic of the account that decides the overall sales structure.

Using the territories here, will benefit you. It will provide focus and simplify the process of record sharing among individuals of different teams.

Are your customers spread across various geographical locations? If so, do you want to reduce travel time and expenses for your sales team?

Creating territories based on geographical locations of the market, and strategically placing sales reps within their native country's sales territory can be of great advantage for the business. This reduces the

time on travel as business opportunities are centered in one demarcated area. Also, this will help your sales team overcome the cultural and language barriers that different territories have.

Does your business structure provide cross-selling opportunities? If so, do you need a flexible data sharing system that helps cross-selling to promote both customer retention and revenue growth?

With a business that deals in software for HR management, financing, staffing, and project management you may have a sales group focused on each of these products. When a prospect is interested in two of these products, how do you share the customer account with individuals from different teams who are involved in the sales cycle!

Having a territorial hierarchy based on the product lines and granting access to sales reps from multiple teams is an efficient way to manage this scenario. It helps in collaborative cross selling for your business.

 Would you look for industry expertise in your sale reps, if your company deals with multiple product lines and verticals?

Sales reps need a thorough product/service knowledge and expertise that help boost sales. In travel business, if you are in charge of a Caribbean cruise, you have to be familiar with the tour packages, the pricing, itinerary, ship information, its special features, excursions and so on.

Create a territory that includes customer accounts interested in the Caribbean cruise. Belonging to this territory that gives you enough experience and opportunities to develop your proficiency and negotiating skills is definitely good for sales.

Your Decision

Make sure you choose the right data-sharing model for the smooth running of your business. If you would like to find out how Territory Management will suit your business needs, you can also refer to the online help for more details on how it works.

To conclude use territory management if you:

- Have a complex sales structure with the need to often change users to different sales teams/territories.
- Need to segment customer accounts based on the account characteristics rather than the record ownership.
- Want an easy to maintain process for the administrators to manage sharing of data among multiple users of different teams.
- Require multiple forecasts targets for users belonging to different sales territories.

6.5 Manage Groups

Create groups to manage a common set of records with a group of members.

Create Groups

You can create different types of user groups and share the common records among groups.

To create groups

1. Click **Setup** > **Users & Permissions** > **Groups**.
2. In the *Groups* page, click **Create Group**.
3. In the *New Group* page, do the following:

o In the *Group Details* section, specify the **Group Name** and **Description** for the group.

o In the *Group Source* section, select the group members. You can select users, roles, roles & subordinates, and different groups as members of the new group.

4. Click **Save**.

Sales Group Details:

This page displays the group information and the associated group sources.

Group Name :   Sales

Group Description :   The US sales group

Associated Users:

Marty Sinclair

Associated Roles:

Vice President

Director of Sales

Associated Roles and Subordinates:

Sales Manager

[Edit] [Delete] [Go to groups list]

6.5.1 Share Records

In SalesGrow CRM, records are always owned by the user. However, access rights to the records can be extended to other users by grouping a set of users and setting up sharing rules for each module. After setting up the sharing rules, group members can access records in CRM modules as per their permission in their profile.

For example, if "User A" doesn't have access to the **Potentials** module, he/she cannot access the **Potentials** by setting up data sharing with groups.

- The owner has all rights on the records
- Records cannot be owned by groups. However, records can be shared with other users by groups and setting up data sharing rules

- A User must have profile-level permission to access the records
- To apply the record sharing, you must recalculate after setting up the sharing rules

To share data with groups

1. Click **Setup** > **Users & Permissions** > **Data sharing Rules**.
2. *In the Data Sharing Rules* page, setup sharing rules for each module*.

3. Click **Save**.

6.5.2 Assign Users

After creating a new group, you can associate members with the group. As mentioned above, group members can be users, roles, roles & subordinates or other groups. After assigning group members you can share the CRM data among users by applying data sharing rules.

Note

- You can assign users to multiple groups and they can access data as per the permissions in the profile and sharing rules.

To associate users to a group

1. Click **Setup** > **Users & Permissions** > **Groups**.
2. In the *Groups* page, select the group to which you want to assign users.
3. In the *Group* Details page, click **Edit**.
4. Under *Group Sources*, select the users.
   You can select users, roles, roles & subordinates, and different groups as members of the new group.
5. Click **Save**.

Edit Groups

After creating groups, you can update the group name and group members as your requirements grow.

To edit groups

1. Click **Setup** > **Users & Permissions** > **Groups**.
2. In the *Groups List* page, you can see the list of Groups you have added.
3. In the *Public Groups List* page, click on **Edit.**
4. In the *Edit Group* page, do the following:
   - In the *Group Details* section, specify the group name and comments for the group in **Group Name** and **Description** fields respectively.
   - In the *Group Source* section, select the group members.
     You can change the users, roles, roles & subordinates, and different groups as members of the new group.
5. Click **Save**.

Delete Groups

Periodically you may consider cleaning up the unwanted groups using the delete function. While deleting, all the data sharing rules will be calculated automatically, updating the changes, so you won't need to recalculate them.

To delete Groups

1. Click **Setup** > **Users & Permissions** > **Groups**.
2. In the *Groups* page, the list of group names will be available.
3. Click the **Del** link to remove any Group from this list.

6.6 Data Sharing Rules

Define rules that help you to share data with peers, management, and subordinates.

6.6.1 Manage Data Sharing

By default, access rights to CRM records is set as private so that the record owner and his/her manager can oversee the CRM data. However, using the Data Sharing Rules, you can extend the access rights to users belonging to other roles and groups. Once the data sharing rules are configured, users associated to other roles and groups can gain additional access to the records that belong to other users.

Key Features

- By default all the modules have a **Private** option.
- If the Organization-wide permission is set as **Public Read/Write/Delete**, everyone can access and update all the users' data. Role Hierarchy and Sharing Rules will not be applied in this case.
- If the Organization-wide permission is set as **Read Only**, everyone can only view the other users' records. In this case other users cannot modify the owner's records.
- If the Organizational permission is set as **Private**, Role Hierarchy and Sharing Rules can be applied.

- You cannot restrict the accessibility set in Organization's default permissions by writing the Sharing Rules. You can only extend the additional data visibility
- In the Import History, records that belong to you and your sub-ordinates (if any) will always be shown.
- All the Attachments, Notes, Emails and Competitors belonging to a record are accessible, if you are able to view that record.
- Forecasts will always be private.

Managing Default Data Sharing Process

You can provide the following types of access levels to user in SalesGrow CRM modules:

- **Private:** Only the record owner and his/her superior can view the record.
- **Public Read only:** Users can view others' records but cannot modify and delete the records.
- **Public Read/Write/Delete:** Other users can view, modify and delete the records.

Availability

Profile Permission Required: Users with the Manage Data Sharing permission can access this feature.

Check Feature Availability and Limits

Note

- By default, access rights to CRM records is set as private so that the record owner and his/her manager can oversee the CRM data.
- The organization-level data sharing model is not yet implemented for Notes, Reports, Dashboards, and Email modules.

To manage default permissions

1. Click **Setup** > **Users & Permissions** > **Data Sharing Settings**.
2. In the *Data Sharing Settings* page, click **Edit All Default Permissions**.
3. In the *Edit Default Organization Permissions* page, update the following Access Privilege for modules:
   - Private
   - Public Read Only

o Public Read/Write/Delete

Leads:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Accounts:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Contacts:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Potentials:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Campaigns:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Activities:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Cases:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Solutions:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Products:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Vendors:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Price Books:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Quotes:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Sales Orders:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Purchase Orders:	● Private	○ Public Read Only	○ Public Read/Write/Delete
Invoices:	● Private	○ Public Read Only	○ Public Read/Write/Delete

4. Click **Save** after updating access privileges for all the modules.

6.6.2 Creating Data Sharing Rules

This feature helps you to create rules to provide access or restrict users from viewing your data in various modules.

Availability

Profile Permission Required: Users with the Manage Data Sharing permission can access this feature.

To create data sharing rules

1. Click **Setup** > **Users & Permissions** > **Data Sharing Settings**.
2. In the *Data Sharing Settings* page, click **New Sharing Rule** for the corresponding module.
3. In the *New Sharing Rule* page, do the following:
    - o Specify from whom the records are shared.

    - o Specify to whom the records are shared.
    - o Choose the **Access Type** from the drop-down list.
    - o Select the **Superiors Allowed** check box to allow data sharing to the superiors.
4. Click **Create Sharing Rule**.

7. Customization

Customizing is the most powerful way of achieving a successful organization-specific Customer Relationship Management system. One of the key elements of SalesGrow CRM is its capacity to allow customization and the flexibility to do so. Based on the organization's requirements, users with Administrative privileges can implement SalesGrow CRM customization.

You can customize a lot of elements like the tabs (modules), the page layouts, sections in a page, fields, etc. The changes include renaming, reordering items and even hiding tabs and fields that are not required.
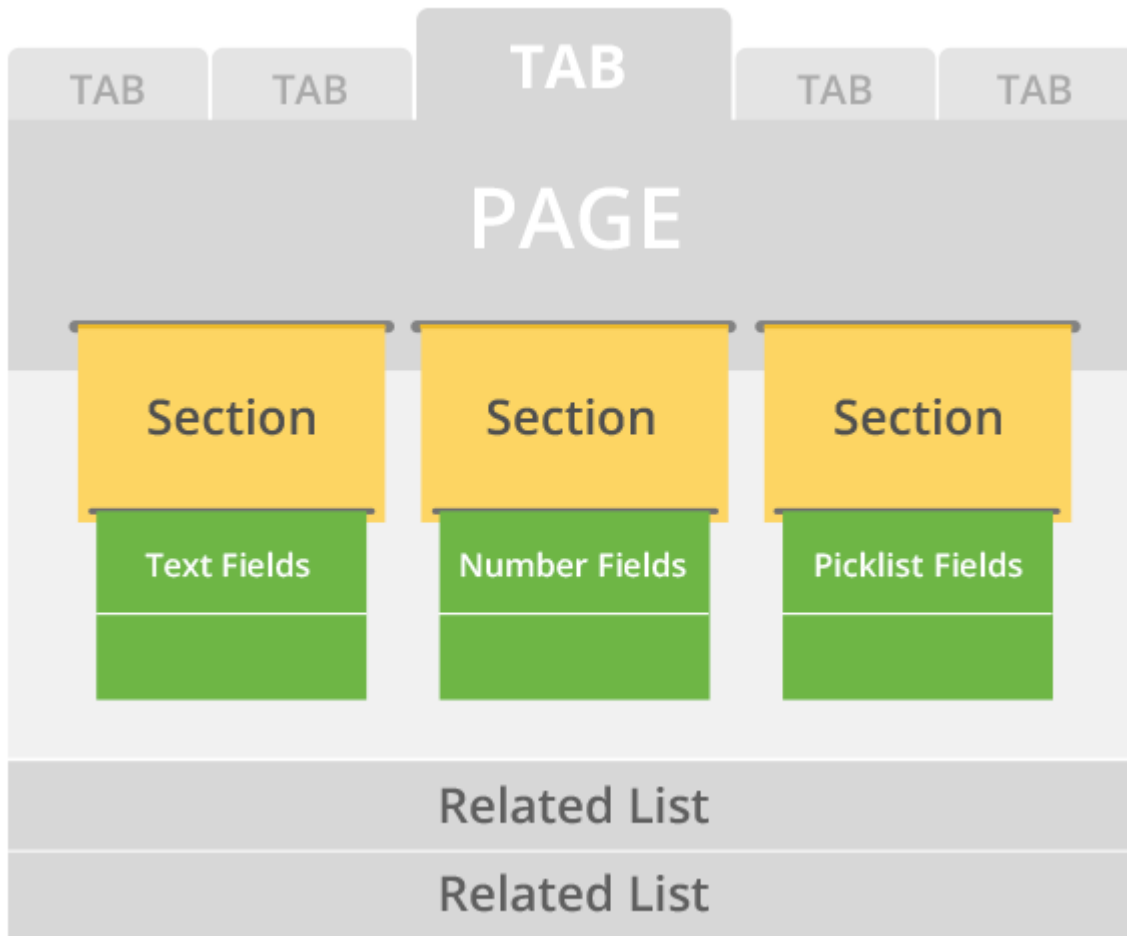
7.1 Home Tab Customization

Personalize your Home tab by adding components and rearranging them.

7.1.1 Add Components

In the Home tab, you can add up to 5 components. Each component will list data from the various others modules like the Leads, Potentials, Activities, Dashboards etc.

To add components

1. In the *Home* tab, click (**Customizable** option icon).

2. In the *Home* tab, click (Add Component icon).
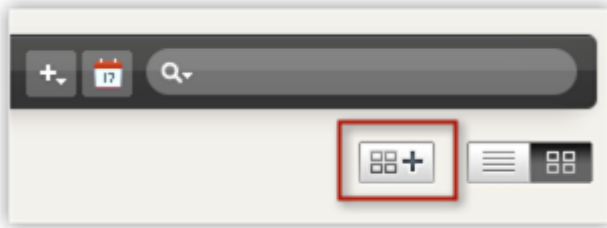
3. In the *Add Component* pop-up window**,** do the following:
   - o Select a **Module** from the drop-down list.
   - o Specify a **Component Name**.
   - o Select a **Column Layout**. You can either have a one column or a two column layout.
   - o Select the **Custom View** whose data you want to view in the Home tab.
   - o Click **Save.**

4. Click the *navigation arrows* to view more records. Only 5 records will be listed per page.

Note

- In the *Classic View*, you cannot customize the components. The number of records per page can be selected by the user.
- Based on the SalesGrow CRM Edition, users can select the records per page.

Customize Column Headings in Components

In the Customizable view, the components that you add in the Home tab can be list views or data in the form of pipelines, pie charts or bar graphs, etc. For the List View components you can easily add, delete and reorder the columns. You need to make the changes for the list view and the same will be applied to the related components in the Home tab also.

To customize column headings

1. Click the *[Module]* **tab**. (For eg. Leads, Contacts, Accounts, etc.)
2. In the *[Module] Home* page, select the list view that you want to edit.
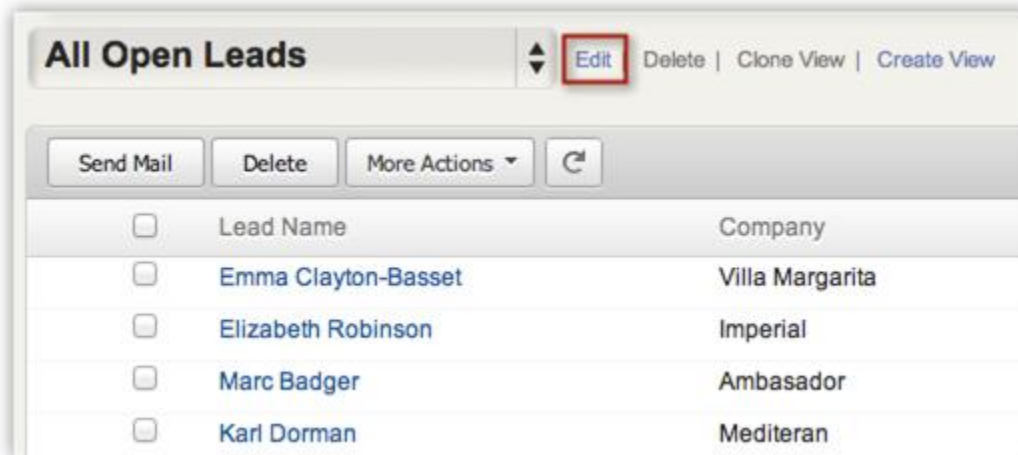
3. Click the **Edit** link.
4. In the *Edit View* page, select and move the fields to the **Available Columns** list box.
   After selecting the columns you can change the order of the columns or remove unnecessary columns from the **Selected Columns** list box.
5. Click **Save**.
   The changes will be applied to the related components in the Home tab.

7.1.2 Change to Customizable Mode

Under the Home tab, you can either set the Classic mode or the Customizable mode where you add up to 5 components and rearrange them to suit your needs.

To change to Classic or Customizable Mode

1. In the *Home* tab, click the **Customizable** option icon.
   The Customizable View of the Home tab will be available. You can add components and rearrange them.
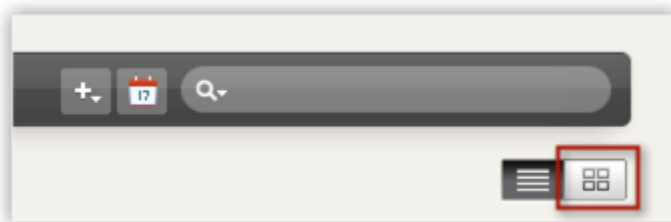
7.2 Tab Settings

Customize the tabs by renaming them, hide unwanted tabs and create web tabs of your own.

7.2.1 Organize Tabs

The option to organize tabs allows organizations to display only the relevant number of modules and hide the unwanted ones. For instance, an educational organization using SlaesGrow CRM might not require the Quotes or Invoices, so these modules can be hidden. You can also change the order of the modules by moving them up or down on the list.

Availability

Profile Permission Required: Users with the Administrator profile can access this feature.

Check Feature Availability and Limits

To organize tabs

1. Log in to SalesGrow CRM with administrative privileges.
2. Click **Setup** > **Customization** > **Modules**.
3. In the *List of Modules* page, click **Manage Modules**.

4. Use the horizontal arrows to move the tabs from the **Unselected Tabs** list to the **Selected Tabs** list and vice versa.
5. Click **Save**.

Note

- The Home tab cannot be hidden.
- Irrespective of the profiles, hidden modules are not displayed to any user.

7.2.2 Rename Tabs

The SalesGrow CRM system provides an option to rename the tab names according to industry-specific terminologies. For instance, the "Leads" tab can be renamed to "Candidates" in an educational institute. Users with Administrator privileges can change the tab names. These changes are reflected in all the standard pages of the user interface except for custom reports and dashboards.

Availability

Profile Permission Required: Users with the Administrator profile can access this feature.

Check Feature Availability and Limits
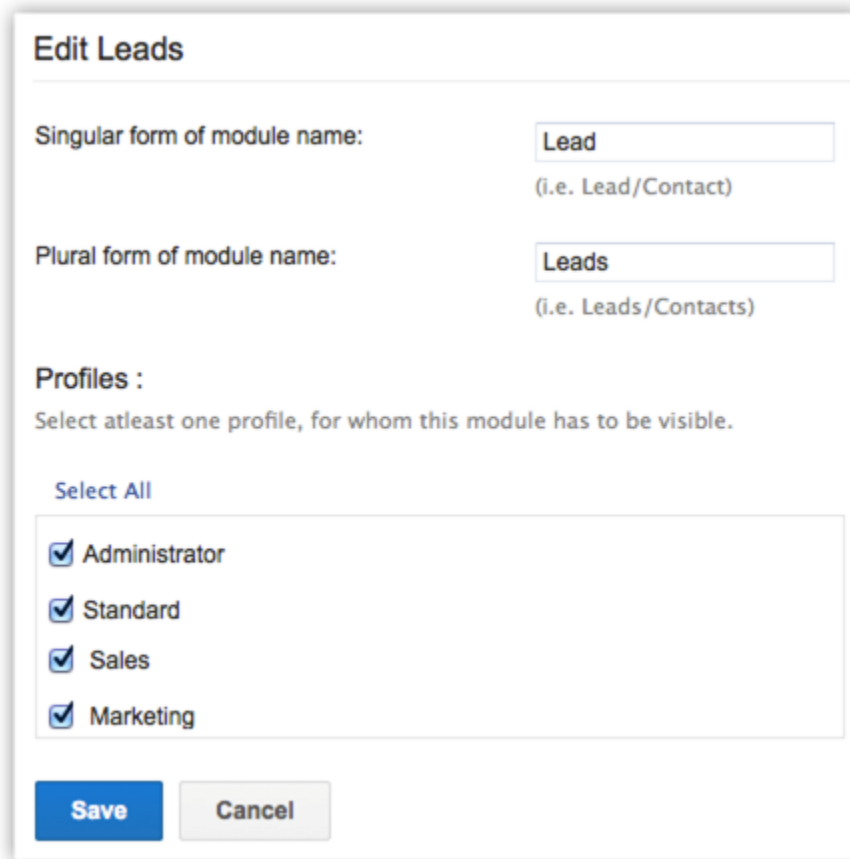
The table below displays the industry specific tab names comparing them to the standard SalesGrow CRM tabs:

saleGrow CRM	Ad Agency	IT Firm	School
Leads	Leads	Leads	Candidates
Accounts	Clients	Accounts	Parents
Contacts	Advertisers	Contacts	Students
Products	Media Type	Services	Courses

To rename tabs

1. Log in to SalesGrow CRM with administrative privileges.
2. Click **Setup** > **Customization** > **Modules.**
3. Move the mouse pointer to the module that you want to rename.

4. Click on the *Setting* icon, and then click **Edit [Module]**.

5. Enter the **singular** and **plural** forms of the module's name in the respective text boxes.
6. Select the profile(s). Users in the selected profiles will have access to the module.
7. Click **Save**.
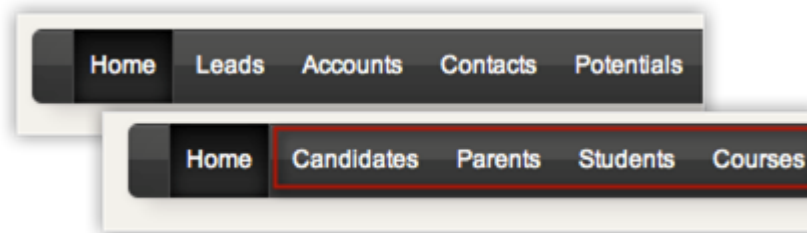
Note

- New tab names will not be reflected on the Page Layout, Reports, and Dashboards modules. Standard names are always displayed.
- All the fields' names will also change according to the new name. For example, if you change the "Account" tab to "Client", the "Account Name" field will be changed to "Client Name".
- If you change a tab name to plural form with the suffix "-ies", the singular form will be suffixed with "y". For example, if you change "Potentials" to "Opportunities", in all the places the singular form of "Potential" is changed to "Opportunity".

- While changing the tab name you can add singular and plural names for the tab, eg: Leads vs. Lead.

7.2.3 Custom Tabs

SalesGrow CRM offers more than 10 standard modules for Sales, Marketing, Customer Support and Inventory management. These modules have predefined business logic, including page layout, reports, and workflow automation, which cannot be completely modified to accommodate your other business processes. Every business has a set of requirements that may not fit into these standard modules. You may require modules that are unique to your organization; that would cater to the needs of your organization, store data that is relevant to your business process and most importantly, be linked with the other standard modules in your account.

For example, a real-estate company using SalesGrow CRM would like to track not only leads, contacts and prospects but would also want to tightly link with properties, buildings, etc. Without these modules, customer life-cycle management is incomplete.

To address these unique business requirements, you can create your own modules. With the **Custom Modules** functionality in SalesGrow CRM, you can develop new modules using built-in tools that need no programming skills. These custom modules can seamlessly integrate with core CRM modules and need not be stand-alone modules. What more, you can:

- Add fields and modify the page layout as per your needs.
- Use roles and profiles to define access controls for the custom modules and its fields.
- Import data to the custom modules with ease.
- Take a backup of your data, anytime.
- Send mass emails to the records in the custom module.
- Use macros to execute a set of actions.
- Create workflow rules to automate your business process.
- Build module relationship by linking custom module records with standard module records.

Availability

Permission Required: Users with Administrator profile can create custom modules.

Check Feature Availability and Limits

Add Custom Modules

Only users with administrator profile have the permission to create modules in your organization's SalesGrow CRM account.

To add custom modules

1. Log in to SalesGrow CRM with Administrator's privileges.
2. Click **Setup** > **Customization** > **Modules**.
3. Click **Create Module**.
4. Enter the **singular** and **plural** form of the module name in the respective text boxes.

5. Select the profile(s). Users in the selected profiles will have access to the custom module.
6. Click **Create**.
On creating the module, *Record Name*, *Record Owner, Email* and *Secondary Email* fields will be automatically added. You can further create fields for the custom module and customize the page layout.

An Example For Real Estate Business

Here is an example of a cusotm module added in a Real Estate account. In the subsequent sections, you'll learn how to use other administrator functions.

142

Edit Custom Modules

To edit custom modules

1. Click **Setup** > **Customization** >**Modules**.
2. Move the mouse pointer to a module and click on the **Settings** icon.
   Options to Edit 'Module', Page Layout, Field Level permissions and Delete will be listed.
3. Click the **Edit 'Module'** link to edit the module name, and the profile permissions for it.
4. Click the **Page Layout** link to edit page layout of the module.
5. Click the **Field Level permissions** link to control the access of fields in the module.

   Note

   1. To edit the field label of the *[Module] Name*, click **Edit** aganist the field label.

Action	Label	Data Type	Custom Field
	Currency	Pick List	○
Edit	School Name	Text	○

   2. In the *Edit Custom Field* section, enter the new label.

   Edit Custom Field

   * Field Name: Name of the School

   * Length: 120

   [Save] [Cancel]

   3. Click **Save**.
      Except for the *[Module] Name*, no other primary field in a custom module is customizable.

Link Custom Modules With Other Modules

By linking a custom module with a standard or another custom module, you can build module relationship and connect data easily. This is very useful in creating a variety of reports based on the data in your custom module. This cross module linking can be done using **Lookup Fields**. Similarly, you can also link standard modules with custom modules but creating a lookup field in the standard module.

To create lookup field in custom module and link it to another module

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Field**.
3. Select the custom module from the drop-down list and click **New Custom Field**.
4. In *New Custom Field* page, select **Lookup** from the Field Type list.
5. In the *Field Details* section, do the following:
6. Enter a name for the lookup field in the **Label** text box. (Eg. *Interested Buyers*)

Apartments: Create Custom Field

Select Field Type:

- Text
- Integer
- Percent
- Decimal
- Currency
- Date
- DateTime
- Email
- Phone
- Pick List
- URL
- TextArea
- Checkbox
- Multiselect Pick List
- Auto Number
- **Lookup**
- Formula
- Long Integer

Provide Field Details:

Label: Interested Buyers

Section Name: Apartment Information

Lookup Type: Buyers

Related List Label: Interested Apartments

7. Select the **Section Name** from the drop-down list where the field should be displayed. (Eg. *Apartment Information*)
8. Select a module from the **Lookup Type drop-down**. The custom field wil poulate data from the module selected here. (Eg. *Buyers.* The lookup field will list all the records from the Buyers module.)

9. Enter the **Related List Label**. (Eg. *Interested Apartments)*
   A related list will be created for the records in the Buyers module.
10. Click **Save**.

Delete Custom Modules

When there is a need to delete a custom modules make sure that it is not linked to another module. Once you delete the custom module, you can't restore data from it. Before deleting make sure you have checked the following:

- You have taken a back up of your data using the **Export** feature.
- The module is not liked with any other custom or standard modules.
- Workflow rules that are configured for the custom module are deleted.

Alternatively, you can hide the custom module for all the users in the organization's CRM account or only to specific profiles.

To delete custom modules

1. Click **Setup** > **Customization** > **Modules**.
2. Move the mouse pointer to a module that you want to delete and click on the **Settings** icon.
3. In the menu, **Delete** link.
   Make sure to read the instructions in the pop-up box and then click **Yes, Delete now** to delete the module.

7.2.4 Group Tabs

The different departments in your organization may use different modules (tabs) in SalesGrow CRM. Tab groups let you organize the tabs available in your SalesGrow CRM account. You can group the Sales, Marketing, Support and Inventory related tabs and share the tab groups with users of the corresponding profiles in CRM.

For instance, the Sales group may use only the Leads, Contacts, Accounts, Potentials, Reports and Dashboards tabs. So you can create a Sales Tabs group and provide accessibility only to the Sales profile. Please note that the users will be able to access the tabs in a Tab Group based on the Module-level Permissions in their profile.

Availability

Profile Permission Required: Users with the Administrator profile can create tab groups.

To create tab groups

1. Click **Setup** > **Customization** > **Tab Groups.**
2. In the *Tab Groups* section, click **Create Tab Group**.
3. In the *Create Tab Group* page, do the following:
   - Enter a **Group Name**.
   - Select the tabs from the **Available List**.
   - Move the tabs to the **Selected List**.
4. Click **Save**.

Note

- You can create a maximum of 10 tab groups with any number of tabs in each group.
- For a given profile, only the tabs in the tab group will be accessible. The users will be able to access the tabs in a group based on the Module-level Permissions in their profile.

7.3 Page-Level Customization

Customize page layouts & columns available in the related list items and create custom views to filter records.

7.3.1 Customize Page Layout

Page-level customization is one of the important functions that allow CRM administrators to define the organization-specific requirements within each module. Ideally, this should be completed before rolling out the CRM system for the organization.

Customize Page Layout

Customizing the page layout allows you to do the following:

- Add required fields or hide the unwanted fields
- Reorder the fields
- Mark fields as mandatory
- Create and delete sections
- Change to one column or two column layout

Availability

Profile Permission Required: Users with the Customize SalesGrow CRM permission can access this feature.

Check Feature Availability and Limits

Add Required Fields or Hide Unwanted Fields

By default all the standard fields are displayed in each module page layout. The customs fields that you create will also be displayed. You can hide some of the standard fields, add new custom fields to the pages and move fields from one section to other section. You can also drag and drop the fields to reorder them.

To show or hide fields

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Layouts**.
3. In the *Edit Page Layout* page**,** drag and drop the *Field Labels* to/from the **List of Removed Fields** to hide or show fields.

4. Click **Save**.

Note

- You cannot add other fields to the *Product Details* section of the **Inventory modules** (Quotes, Purchase Orders, Sales Orders and Invoices).

- If you remove the *Probability* field from the Potentials module, you will not be able to *Edit* a Potential's Stage in the *Business Card* view from the Record's Details Page. This is because *Potential Stage* is defined by its *Probability*. For example, you have defined the stage "Negotiation" by a Probability of "10%". If you remove the Probabilty field altogether from Potentials, the Stage has no definition and therefore is no longer editable from the *Business Card* view. In order to be able to edit the Stage from the *Business Card* view, make sure that the *Probability* field is included back in the Potential Information section.

Modules List: [Potentials]   [Create Section]   [New Custom Field]

Potential Information   📝 🗑   **List of Removed Fields**   ⊚

⠿ 🔒 Potential Owner   ⠿ Amount   ⠿ Probability (%)

⠿ Potential Name   ⠿ Initial Payment   ⠿ Gender

⠿ Account Name   ⠿ Total Amount
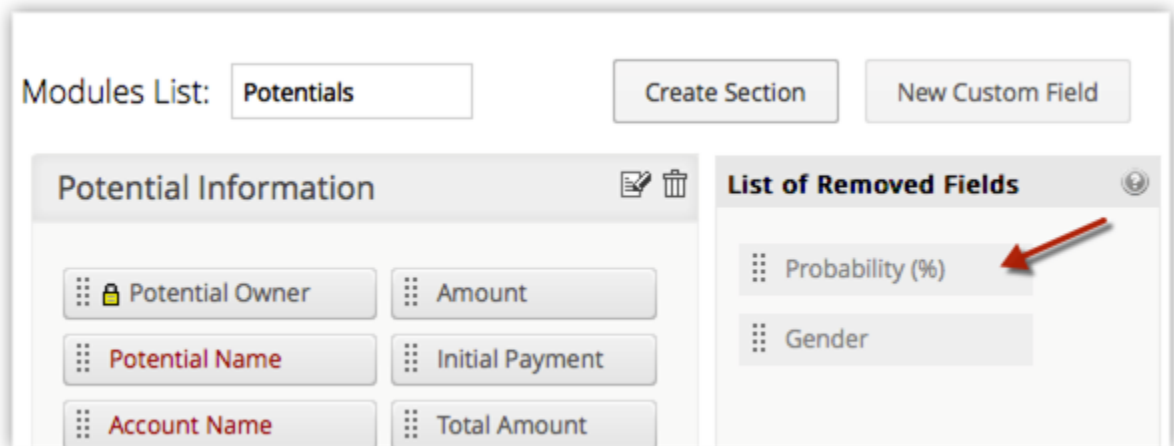
Mark Fields as Mandatory

You can make certain fields mandatory in SalesGrow CRM as per your requirements. Note that the **Locked Fields** and certain **Standard Fields**, cannot be removed or changed from mandatory. For example, **Last Name** and **Lead Owner** in Leads; **Potential Owner**, **Potential Name**, **Stage**, and **Closing Date** in Potentials.

To mark a field as mandatory

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Layouts**.
3. In the *Edit Page Layout* page, move the mouse pointer over the field and select the check box. Clear the check box to change the field from mandatory.
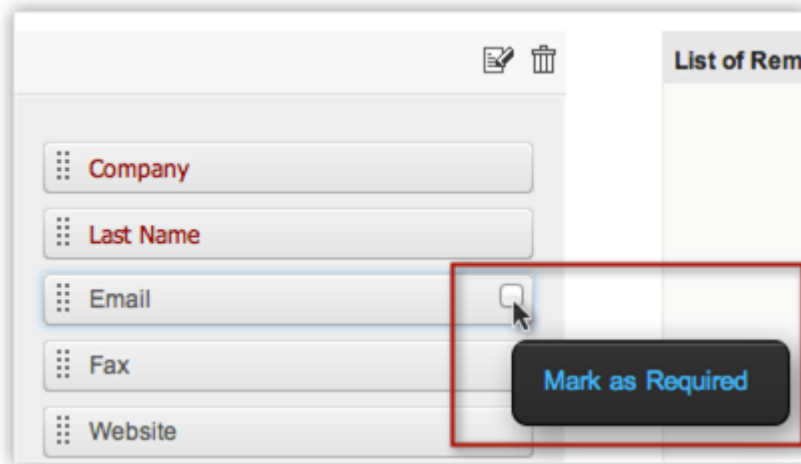
4. Click **Save**.

Add or Modify Sections

Sections help in combining certain type of fields within a particular topic. By default, there are some sections available in each module. You can add, modify or delete these sections based on your organization's requirements.

To add a section

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Layouts**.
3. In the *Edit Page Layout* page**,** click **Create Section**.

4. In the *Create Section* dialog box, add **Name** for the new section, select the **Column Layout**, and click **OK**.

5. Click **Save**.
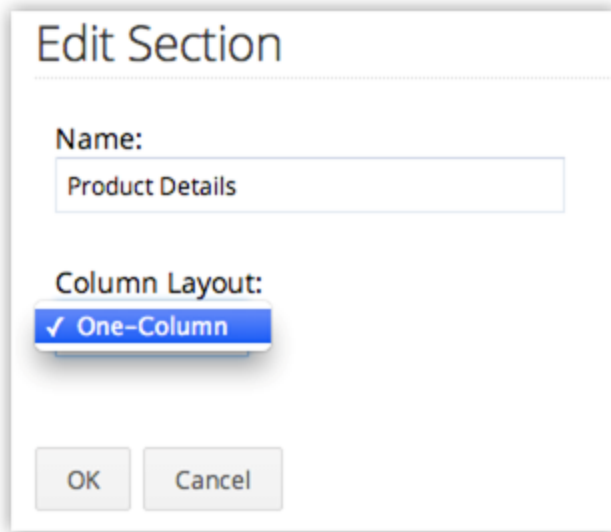
150

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Layouts**.
3. In the Edit *Page Layout* page**,** click **Edit** icon.
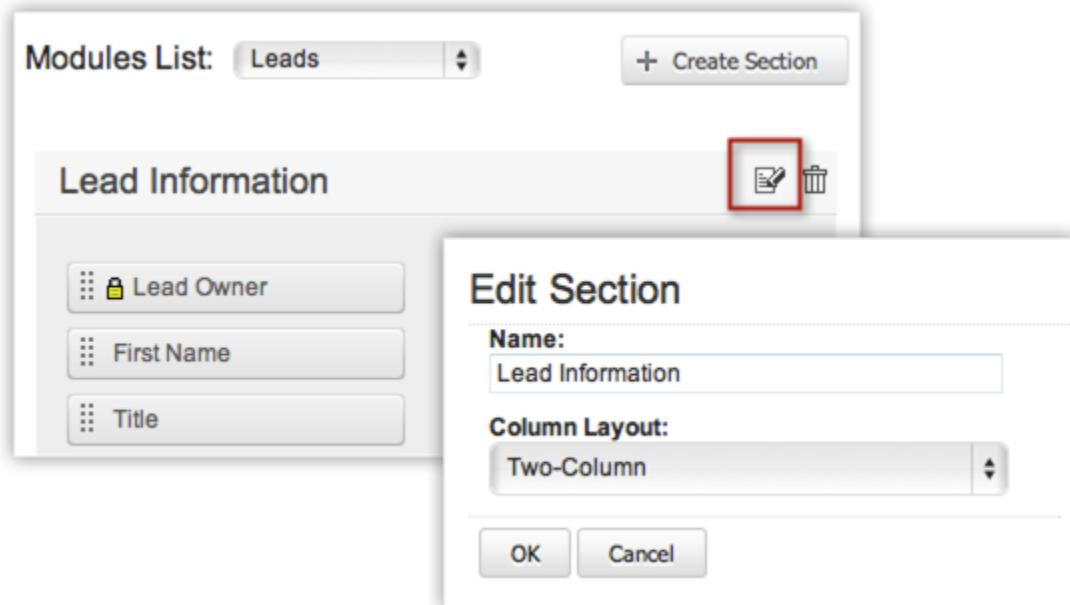
4. Edit the **Name** and **Column Layout details**, if required, and click **OK**.
5. Click **Save**.

Note

- The tab order is set to Left-Right on selecting "Two-Column" in the **Column Layout**.

- Click ![delete icon] (Delete icon) to delete the section.
- *Product Details* section of the **Inventory modules** (Quotes, Purchase Orders, Sales Orders and Invoices) has only single-column layout support. You do not have the Two-Column Layout support for this section.

7.3.2 Organize Page Details

The option to Organize Page details, is available in each module and helps to change the order of the related list views. Additionally, you can show or hide some of the related lists as per your organization's requirement using this feature.

To organize page details

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click a [Module] **tab**.
3. Select a record from the list view.

4. In the *[Record] Details* page, click   (Settings icon) and then click **Organize [Module] Details**.

5. In the *Organize [Module] Details* page**,** choose the options from the **Unselected List**.
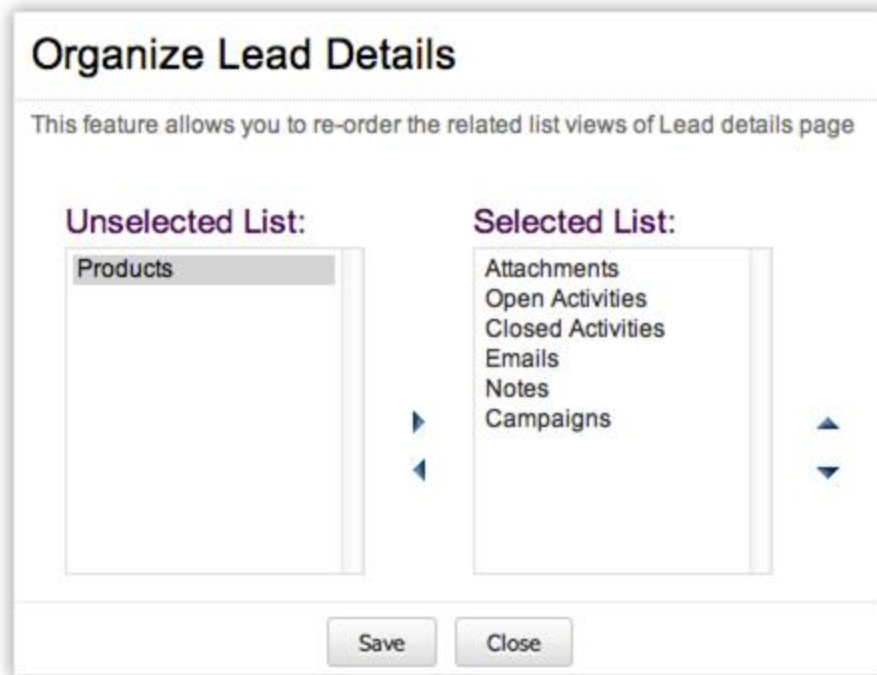
6. Move the selected options to the **Selected List**.
7. Change the order of the **Related List** as per your requirement.
8. Click **Save**.

7.3.3 Related Lists

The Related Lists are the records that are associated to the parent record. For example, an Account has Contacts, Potentials, Notes, Open Activities, etc., associated to it. These associated records are the Related Lists. Customizing the related list view allows you to re-order or modify the columns in the list view.

Availability

Profile Permission Required: Users with the Customize SalesGrow CRM permission can access this feature.

To customize related lists

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Related List**.
3. In the *Related List Columns* page**,** select the module from the **Modules List**.
4. Select the options from the **Available Columns** that you want to be displayed in the Related List.
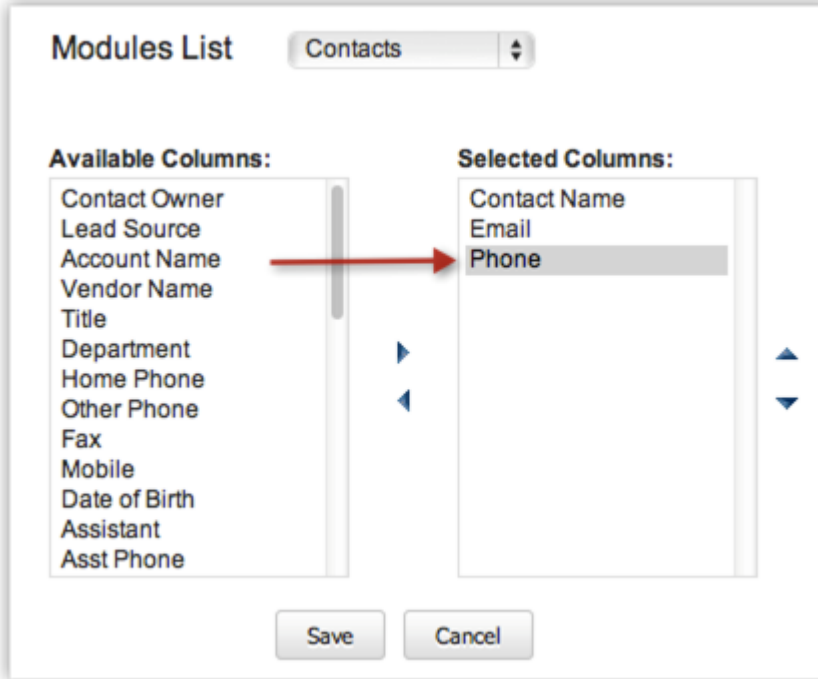
5. Move the selected options to the **Selected Columns** list.
6. Click **Save**.

Note

- Company defined mandatory fields cannot be removed from the Related List columns.
- You can create custom fields for a module, and the same will be listed under the **Available Columns**.

7.3.4 Search Layout

The Search Layout helps you customize the field values that you want to view in search results. For example, when you search leads by name, you may want to view the values from the email, phone, lead

type and lead source fields. You can select just these in the Search Layout. A maximum of 6 fields can be selected.

Availability

Profile Permission Required: Users with the Administrator profile can access this feature.

Check Feature Availability and Limits

To customize search layout

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Search Layout**.
3. In the *Search Layout* page, select the module from the **Modules List** and click **Edit**.

Select Module: Leads

Lead Fields List: Save

Field Name	Fields
Lead Owner	☐
Company	☑
First Name	☐
Last Name	☐
Title	☐
Email	☑
Phone	☑
Fax	☐
Mobile	☐
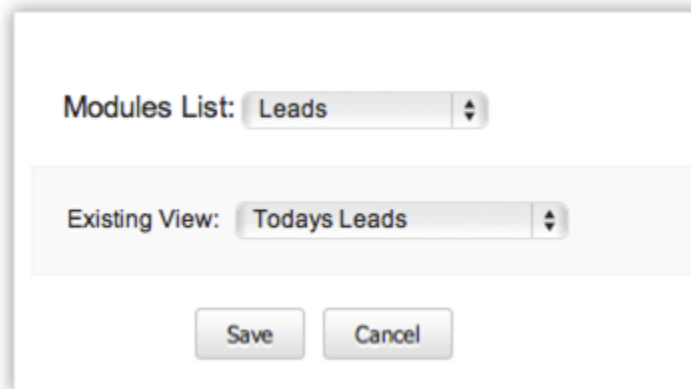
4. In the *Fields List* section, select the check box(es) of the fields that you want to view in the Search Results' page.
5. Click **Save**.

This option enables customizing the default view for the modules depending on an individual user's choice. Once the default view is customized, the new chosen view becomes the default view displayed whenever the module is accessed. For instance, the default view for the Leads module could be **All Open Leads**.

To customize view settings

1. Click **Setup** > **Customization** > **Custom View Settings**.
2. In the *Custom View Settings* page, select the **Module** from the drop-down list.

Modules List: Leads

Existing View: Todays Leads

Save   Cancel

3. Select the **List View** from the drop-down list.
4. Click **Save**.

7.3.5 Manage List View

A List View is grouping of records based on a defined set of criteria. List Views are beneficial for displaying customer specific data according to your business requirements. For example, you may be interested in following-up on the leads created during the last week or review overdue tasks or you may want to filter out big deals. The best way to handle these scenarios is to filter the records using the list views. You can also use the List Views for changing record owners, deleting records in bulk and sending mass emails.

SalesGrow CRM provides a set of **Standard** list views that are ready to be used by all the users in your organization. In addition, you can also create list views and share with colleagues in your organization.

- **Standard List Views**: You can modify the standard views and sort the order of the columns in the list. You cannot delete these list views.
- **Custom List Views**: You can create, modify and delete the custom views and you can also sort the order of the columns in the list.

List views are categorized under **Created By Me** and **Shared With Me**. You can also mark list views that you often use as **Favorites** and those will be listed first in the List View drop-down. Just click the Star next to a list view and it will available under Favorites.

Standard List Views

In the *<Module> Home* page, you can select the required list view from the **View** drop-down list. You can only rearrange the order of the columns or add more columns to the standard view modes. Some of the standard list views are: All Records, My Records, Recently Create Records, Recently Modified Records, Recently Viewed Records, etc.

Create Custom List Views

You can create custom list views in SalesGrow CRM by defining criteria as per your requirement. The custom views created by the user will be listed under the **Created By Me** in the drop down list.

Availability

Permission Required: Users with the Manage Custom Views permission can access this feature.

Check Feature Availability and Limits

To create custom views

1. Click the *[Module]* **Tab**.(For e.g. Leads, Contacts, Accounts, etc.)
2. In the *[Module] Home* page, move your mouse pointer to the list view's drop-down.
3. Click the **Create View** link.

4. In the *New View* page, do the following:
   o   Enter the custom **View Name**.

157

o   Select the **Mark as Favorite**, if required.
     The custom list views marked as favorite will be listed first in the list view drop-down.

o   Select the columns to be displayed in the View mode.
o   Choose the option as to who can see this view.

o   **Specify Criteria** to filter the records.
5.   Click **Save**.

Specifying List View Criteria

In the Specify Criteria section you can specify the criteria based on which records will be filters and under this list view. The following table lists the criteria options for certain types of fields:

Field Type	Criteria Options
String fields like: • First Name • Created By • Mobile • Skype ID • Email • Phone • Website • Salutation • Industry • Company • Title • State	None is isn't contains doesn't contain starts with ends with is empty is not empty
Numeric fields like: • Age • My Currency • My Percentage • My Decimal • Age in Days	= != < <= > >= is empty is not empty

Date & DateTime fields like:

• Created Time • Modified Time	• My Date • My Date Time

is
isn't
is before
is after
between
not between
Today
Tomorrow
Tomorrow Onwards
Yesterday
Till Yesterday
Last Month
✓ Current Month
Next Month
Last Week
Current Week
Next Week
is empty
is not empty
Age in Days

Boolean fields like:

• Email Opt Out • Add to QuickBooks	• Active • My Date Time

is ▾   Select an Option

true

false

Note

- You can add up to 25 criteria.
- Specify the numbers without commas. For example, specify 15,000 as 15000.
- If you select the None option, custom view will not be created.
- **Age in Days** option is a very useful for the Date and DateTime fields. It can be used to filter records such as, leads that were created within the last 15 days, potentials that were closed in the past 10 days, or users whose subscription was renewed in the lats 5 days.

Selecting List View Columns

In the *Choose Columns* section, select the columns to be displayed in the List View from the **Available Columns** list box. After selecting the columns you can change the order of the columns or remove unnecessary columns from the **Selected Columns** list box.

Note

- It is better to select less than 10 columns to avoid horizontal scrolling in List View.

Setting up Permissions to the List View

In the *Accessibility Details* section, define the user's accessibility to view the custom lists. The following options are available:

- All users are allowed to view this custom view.
- Show this custom view only to me.
- Allow the following users to view this custom view.

Edit Criteria Patterns

Criteria Pattern Editor in the custom list views help you to define the advanced filters using simple logic like **and / or**.

Availability

 Profile Permission Required: Users who have the access to the Custom List view can use this option.

Check Feature Availability and Limits

Note

- You can specify a maximum of **25 criteria** for a list view.

To edit criteria patterns

1. Click **Module** tab.
2. Select a *List View* from the drop-down list.
3. In *Edit View* page, review your existing criteria and click the **Change Pattern** link.
4. In *Pattern Editor* box, modify filters and click the **Save** link.
5. Save the modified custom view.

Example:
You would like to filter out the leads registered for a Webinar or Trade Show from California or Texas, and whose Industry is IT**.**

161

Lead Source contains "Webinar or Trade Show" and State is "California or Texas" and Industry is "IT"

You can create this criteria easily using the Criteria option given below:

The criteria pattern will be automatically set as:

Since the criteria pattern does not match the requirement, you can edit it as:

You can use the following characters in the Criteria Pattern Editor:

- Round brackets: ( )
- **and / or** operators
- Criteria Row Number

Important Notes

- When the *Change Pattern* box is open, you cannot add or delete a criteria row under the *Specify Criteria* section.
- The operator precedence will not be taken into account if you do not specify brackets. For example, if you specify the criteria as **1 or 2 and 3**, it will be considered as **((1 or 2) and 3)**
- You can change the **and** or **or** of the criteria rows and it will be updated in the Editor below.
- You can change the **and** or **or** condition in the pattern and it will be updated in the rows above.
- If you specify **1 and 2** and save it, on editing the view the pattern will be shown as **(1 and 2)**. For **(1 and 2) or 3** the pattern will be shown as **((1 and 2) or 3)**
- If you add more rows in the editor and delete one by one there will be additional brackets displayed in the pattern. For example if there are 5 rows added and you delete the 4th row, it will be shown as **((((1 and 2) or 3))or 4)** and if the 3rd row is deleted again it will be shown as **((((1 and 2))) or 3)**. If the first row is deleted then it will be shown as **((((1))) or 2)**.

However, upon saving the criteria, it will become **(1 or 2)**. (((1 and 2) and 3)) will appear if the last criteria is deleted.

- Make sure that you do not use the following as they are invalid: **()**, **(and)**, **(or)**
- If the brackets do not match it will be treated as invalid.
- You will get an error message, if the number of rows and the numbers given in the pattern do not match and also, if there are any missed numbers in the pattern specified.
- *Save* and *Cancel* buttons on the custom view will be hidden while editing the criteria pattern.
- In case the final brackets are missing, there will be a difference in the Criteria Patterns Editor and its view mode.

Your Criteria Pattern in Editor	Your Criteria Pattern in View Mode
(1 and 2) or (3 and 4)	((1 and 2) or (3 and 4))
1 and 2 and 3 and 4	(1 and 2 and 3 and 4)
(1 or 2) and (3 or 4)	((1 or 2) and (3 or 4))

Use Last Activity Time in Criteria

Apart from editing a record, there are various other activities associated with records. For example, adding a note, closing a task, sending emails etc. The last updated time of such activities is captured in each record as **Last Update: Time** (only in the Leads, Accounts, Contacts and Potentials modules). The information in this field can be used in the List View criteria, to filter out records that had no activity for a specific period of time or those records that had recent activities.

Note

- This option is supported only for the Leads, Accounts, Contacts and Potentials modules.
- The Last Activity Time under list view criteria and the **Last Update** time in the Record Details page are the same.
- You can use this criteria only for the custom list views.

Availability

Profile Permission Required: Users who have the access to the Custom List view can use this option.

Check Feature Availability and Limits

The activities and updates that will be recorded as Last Activity time:

- Editing fields in a record
- Adding & updating activities, i.e. Tasks, Events, Calls

163

- o Sending emails to leads and contacts
- o Adding & editing notes
- o Adding potentials & contacts under an account
- o Changing the owner of the record
- o Adding and deleting a record
  (This does not include deleting a record associated to the parent record.)
- o Closing a task
  (This does not apply for events as they are automatically moved under Closed Activities after the End DateTime.)
- o Deleting and restoring the records (individually or in bulk).

The activities and updates that will NOT be recorded as Last Activity time:

- Mass operations like Mass Update, Mass Transfer etc.
  (Except for Mass Delete option.)
- Editing contacts or potentials under an account will not be listed under the Account
- Deleting related lists under a record.

To use the Last Activity Time in criteria

1. Click the **Leads**, **Accounts**, **Contacts** or **Potentials** module.
2. Select a *List View* from the drop-down list and click the **Edit** link.
   You can specify criteria only for the custom list views.
3. In *Edit View* page, under *Specify Criteria* select the **Last Activity Time** from the drop-down list.
4. Specify the criteria conditions.
5. Click **Save**.

Clone Custom List View

The custom views that you create can be duplicated and a similar list view can be created. Please note that the default views cannot be cloned or deleted.

To clone custom list views

1. Click the *[Module]* **Tab**.(For e.g.. Leads, Contacts, Accounts, etc.)
2. In the *[Module] Home* page, select the list view that you want to duplicate.
3. Click the **Clone View** link.
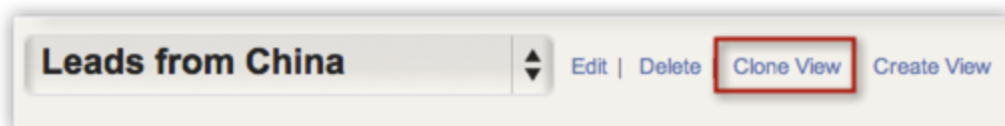
4. In the *Clone View* page, do the following:
   - o Enter the custom **View Name**.
   - o Select the columns to be displayed in the View mode.
   - o Choose the option as to who can see this view.
   - o Select the **Specify Criteria** check box and specify the criteria.

5. Click **Save**.

Edit Standard List View

You can edit the standard list views that are by default provided in SalesGrow CRM to add or remove the columns in the list view. Please note that you cannot edit the criteria or rename these pre-defined list views.

To edit standard list views

1. Click the *[Module]* **Tab**. (For e.g. Leads, Contacts, Accounts, etc.)
2. In the *[Module] Home* page, select the list view that you want to edit.
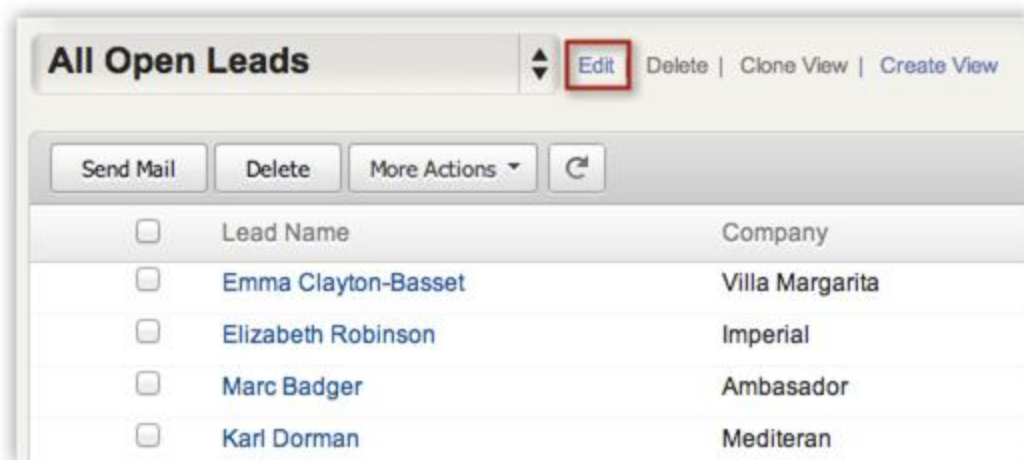
3. Click the **Edit** link.
4. In the *Edit View* page, select and move the fields to the **Available Columns** list box.
    After selecting the columns you can change the order of the columns or remove unnecessary columns from the **Selected Columns** list box.
5. Click **Save**.

Sort Records in List View

Records in the list view can be sorted in ascending or descending order.

To sort records

1. Click the *[Module]* **Tab**. (For e.g. Leads, Contacts, Accounts, etc.)
2. In the *[Module] Home* page, select the list view that you want to see.

3. Click on the *column heading* and then select **Ascending** or **Descending** option to sort the records.

Delete Custom List View

The custom views that you create can be deleted if required. Please note that the pre-defined list views cannot be deleted.

To delete custom list views

1. Click the *[Module]* **Tab**. (For e.g. Leads, Contacts, Accounts, etc.)
2. In the *[Module] Home* page, select the list view that you want to delete.

3. Click the **Delete** link.

7.3.6 Add Photo

You can add a photo of your contacts and leads in your SalesGrow CRM account. You can delete the photos whenever required.

To add a photo
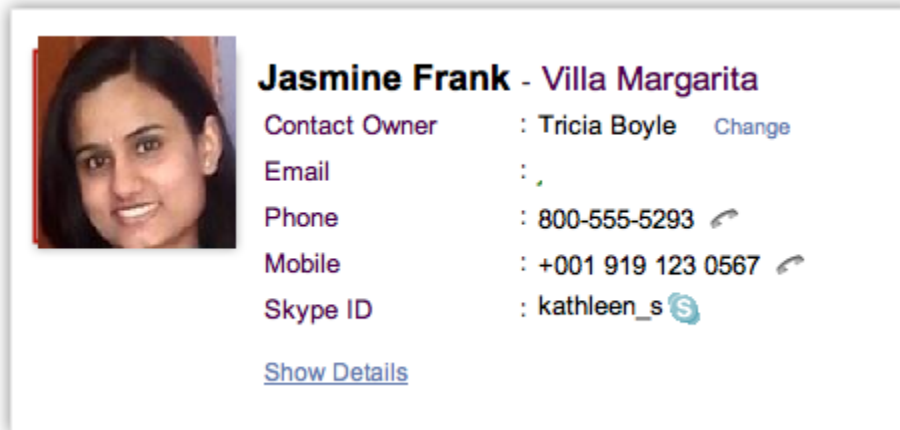
1. Click the *[Module]* **tab**.
2. From the list of records, select a record for which you want to add a photo.
3. In the *Record Details* page, click on the photo.
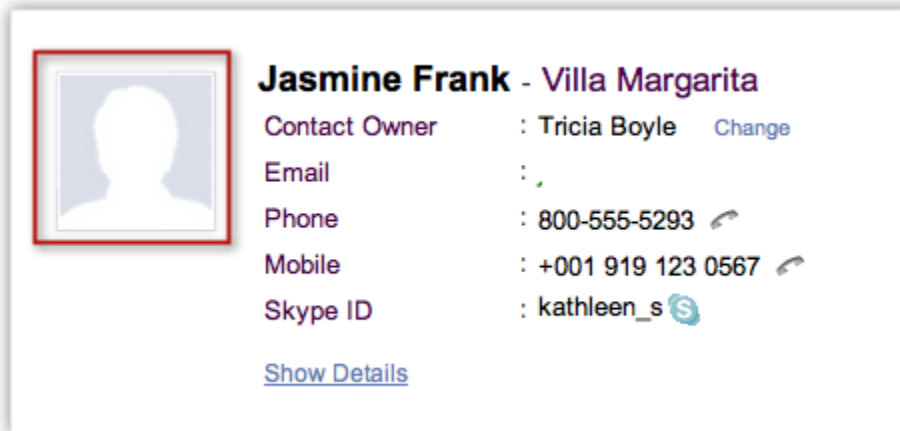
4. Browse and select the images from your desktop, and click **Upload**.
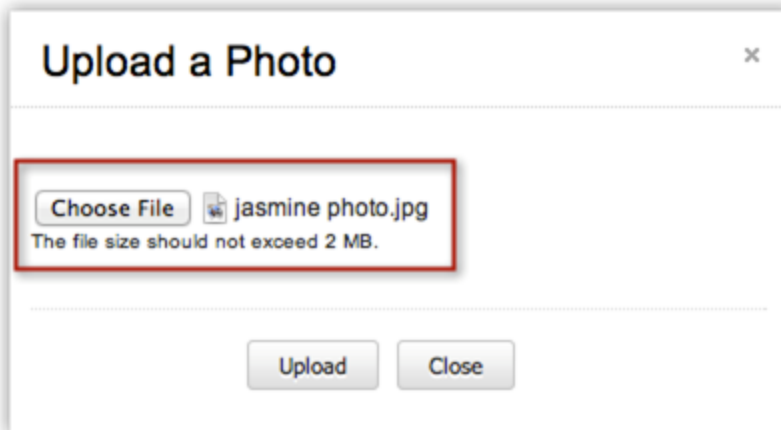
The photo will be added to the record.

7.3.7 Email Address Duplication Check

When you have hundreds and thousands of business contacts, every time you add a new contact to your growing business, it is not very easy to check for duplicates. SalesGrow CRM provides you with an option to check if a lead or contact already exists in your CRM account by using email address, which is a unique value. While adding a record, if the email address matches with a record in CRM you will be notified. This will avoid creating duplicates.

The administrator or a user with the **Customize SalesGrow CRM** profile permission needs to enables this option to check for email address duplication. Once it is enabled, you will be able to avoid adding duplicate records in your Leads and Contacts modules while creating records, collecting leads/contacts using web forms, importing, etc.

Note

- You can avoid duplicates only for the **Email** field in the Leads and Contacts Module.
- Duplication check will not be performed for the **Secondary Email** field and the email fields created by you.

Availability

Permission Required: All the users can use this feature once it is enabled.
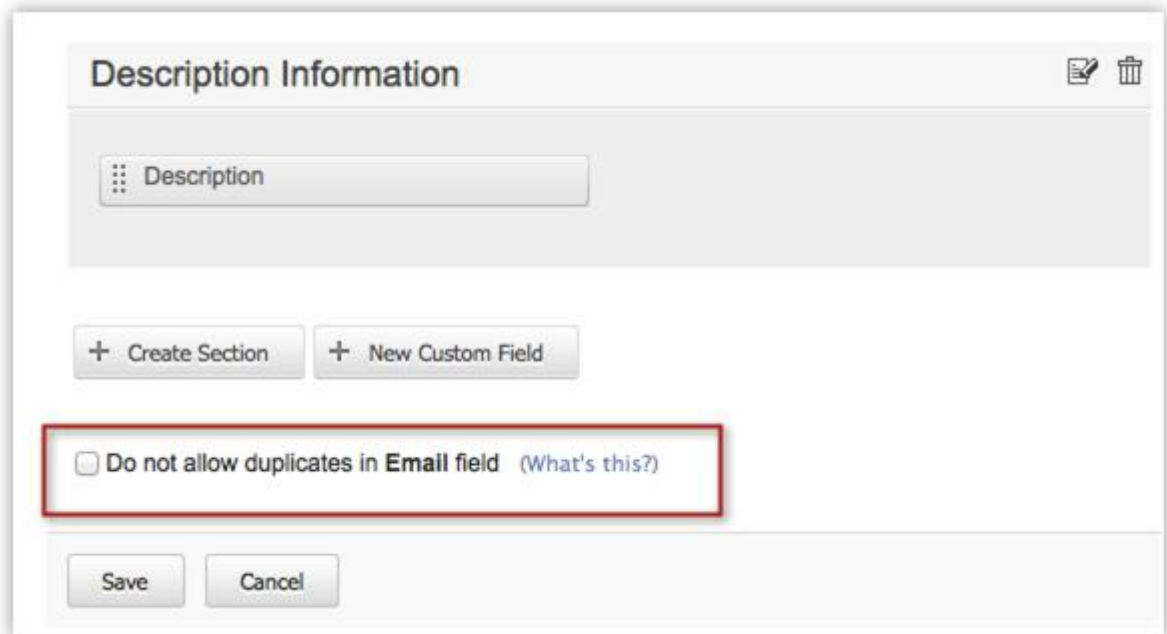
Users with the **Customize SalesGrow CRM** permission in profile can enable this feature. All the Administrators will receive an email notification, when this feature is enabled or disabled. Please note that you need to enable it separately for the Leads and Contacts module. Once it is enabled, all the users can use it and they will be notified while adding a lead or a contact whose email address already exists in CRM.

To enable the feature

1. Click **Setup** > **Customization** > **Layout**.
2. In the *Edit Page Layout* page, select the Leads/Contacts module.
   You need to enable it separately for the Leads and Contacts module.
3. Select the **Do not allow duplicates in Email field** check box.

4. Click **Save**.
   You can disable this feature by clearing the **Do not allow duplicates in Email field** check box.

7.4 Field-Level Customization

Create custom fields, formula fields and hide unwanted fields.

7.4.1 Standard Fields

Standard Modules & Fields

You can use API to integrate with the following standard modules:

Leads	Accounts	Contacts
Potentials	Campaigns	Forecasts
Cases	Solutions	Products
Price Books	Quotes	Events
Invoices	Vendors	Purchase Order
Tasks	Calls	

The following tables give the list of supported fields in the SalesGrow CRM Modules along with their description.

Leads

Field Name	Description	Data type	Maximum Limit
Lead Owner	Select the SalesGrow CRM user to whom the Lead is assigned.	Lookup	-
Salutation	Select the salutation from the drop-down list.	Pick list	-
First Name	Specify the first name of the lead.	Text box	Alphanumeric(40)
Title	Specify the job position of the lead	Text box	Alphanumeric(100)
Last Name*	Specify the last name of the lead. This field is a mandatory.	Text box	Alphanumeric(80)
Company*	Specify the name of the company where the lead is working. This field is a mandatory.	Text box	Alphanumeric(100)
Lead Source	Select the source of the lead, that is, from where the lead is generated.	Pick list	-
Industry	Select the industry to which the lead belongs.	Pick list	-
Annual Revenue	Specify the annual revenue of the company where the lead is working.	Currency	Decimal (16)
Phone	Specify the phone number of the lead.	Text box	Alphanumeric(30)
Mobile	Specify the mobile number of the lead.	Text box	Alphanumeric(30)
Fax	Specify the fax number of the lead.	Text box	Alphanumeric(30)
Email	Specify the email address of the lead.	Email	Alphanumeric and Special characters(100)
Secondary Email	Specify another email address of the lead.	Email	Alphanumeric and Special characters(100)
Skype ID	Specify the Skype ID of the lead. Currently skype ID can be in the range of 6 to 32 characters.	Text box	Alphanumeric(50)
Web site	Specify the Web site of the lead.	URL	Alphanumeric(120)
Lead Status	Select the status of the lead from the drop-down list.	Pick list	-
Rating	Select the rating of the lead from the drop-down list.	Pick list	-
No. of Employees	Specify the number of employees in lead's company.	Numeric	Integer (16)
Email Opt-	Select the check-box to remove leads from	Check box	-

out	your mailing list so that they will not receive any emails from your SalesGrow CRM account		
Campaign Source	Select the campaign related to the Lead	Lookup	
Created By	Displays name of the user created the Lead first time.	Date/Time	-
Modified By	Displays name of the user modified the Lead.	Date/Time	
Street	Specify the street address of the lead.	Text box	Alphanumeric(250)
City	Specify the name of the city where the lead lives.	Text box	Alphanumeric(30)
State	Specify the name of the state where the lead lives.	Text box	Alphanumeric(30)
Zip Code	Specify the postal code of the lead's address.	Numeric	Alphanumeric(30)
Country	Specify the name of the lead's country.	Text box	Alphanumeric(30)
Description	Specify any other details about the lead.	Text area (long text)	32000 characters

Accounts

Field Name	Description	Data type	Maximum Limit
Account Name *	Specify the company name. This field is mandatory.	Text box	Alphanumeric(100)
Account Owner	Select the name of the user to whom the account is assigned.	Look up	-
Website	Specify the URL of the company's Web site.	URL	Alphanumeric(30)
Ticker Symbol	Specify the ticker symbol of the Company.	Text box	Alphanumeric(30)
Parent Account	Select the parent company name from the Change pop-up dialog.	Lookup	
Employees	Specify the number of employees in account's company.	Numeric	Integers(10)
Ownership	Specify the type of ownership of the company.	Picklist	
Industry	Select the type of industry from the drop-down list.	Pick list	-
Account Type	Select the type of account from the drop-	Pick list	-

	down list.		
Account Number	Specify the reference number for account. Up to 40 characters are allowed in this field.	Numeric	Number
Account Site	Specify the name of the account's location, for example, Headquarters or London. Up to 80 characters are allowed in this field.	Text box	Alphanumeric(30)
Phone	Specify phone number of the account.	Text box	Alphanumeric(30)
Fax	Specify fax number of the account.	Text box	Alphanumeric(30)
E-mail	Specify the official E-mail address of the account.	E-mail	Alphanumeric and Special characters(100)
Rating	Specify the rating of the account.	Pick list	-
SIC Code	Specify the Standard Industrial Classification code of the account.	Text box	Integers(10)
Created By	Displays name of the user created the Account first time.	Date/Time	-
Modified By	Displays name of the user modified the Account.	Date/Time	
Annual Revenue	Specify the annual revenue of the account.	Numeric	Integers(10)
Billing Address • Street • City • State • Code • Country	Specify the billing address of the account to send the quotes, invoices, and other agreements.	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country-Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Shipping Address	Specify the shipping address of the account	• Street - Text box	• Alphanumeric(250) • Alphanumeric(30)

	to deliver the shipment.	• City - Text box	• Alphanumeric(30)
• Street		• State - Text box	• Alphanumeric(30)
• City		• Code - Text box	• Alphanumeric(30)
• State		• Country - Text box	
• Code			
• Country			
Description	Specify any other details about the account.	Text area (long text)	32000 characters

Contacts

Field Name	Description	Data type	Maximum Limit
Contact Owner	Select the SalesGrow CRM user to whom the account is assigned.	Lookup	-
Salutation	Select the Salutation of the contact, such as Mr., Ms, Mrs., or others.	Pick list	
First Name	Specify the first name of the contact.	Text box	Alphanumeric(40)
Last Name*	Specify the last name of the contact. This field is mandatory.	Text box	Alphanumeric(40)
Account Name	Select the account related to the contact.	Lookup	-
Vendor Name	Select the vendor relatedd to the contact	Lookup	-
Campaign Source	Select the Campaign related to the contact	Lookup	-
Lead Source	Select the source from which the contact is created.	Pick list	-
Title	Specify the job position of the contact.	Text box	Alphanumeric(50)
Department	Specify the department of the contact.	Text box	Alphanumeric(30)
Date of Birth	Specify the birthday of the contact to send greetings for a better relationship.	Date	-
Reports To	Select the person to whom the contact	Text area	255 characters

	reports		
Created By	Displays name of the user created the contact first time.	Date/Time	-
Modified By	Displays name of the user modified the contact	Date/Time	
Email Opt Out	Select the check-box to remove contacts from your mailing list so that they will not receive any emails from your SalesGrow CRM account	Check box	-
Skype Id	Specify the Skype ID of the contact. Currently skype ID can be in the range of 6 to 32 characters.	Text box	Alphanumeric(50)
Phone	Specify the office phone number of the contact.	Text box	Alphanumeric(50)
Mobile	Specify the mobile number of the contact.	Text box	Alphanumeric(50)
Home Phone	Specify the home phone number of the contact.	Text box	Alphanumeric(50)
Other Phone	Specify the other phone number of the contact (if any).	Text box	Alphanumeric(50)
Fax	Specify the Fax number of the contact.	Text box	Alphanumeric(50)
Email	Specify the primary email address of the contact.	Email	Alphanumeric(100)
Secondary Email	Specify another email address of the contact.	Email	Alphanumeric(100)
Assistant	Specify the name of the contact's assistant.		
Asst Phone	Specify the phone number of the contact's assistant.	Text box	Alphanumeric(100)
Mailing Address • Street • City • State • Zip	Specify the primary address of the contact.	• Street - Text box • City - Text box • State - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)

• Country		• Code - Text box • Country- Text box	
Other Address • Street • City • State • Zip • Country	Specify the other address of the contact (if any).	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Description	Specify any other details about contact.	Text area (long text)	32000 characters

Potentials

Field Name	Description	Data type	Maximum Limit
Potential Owner	Select the name of the user to whom the potential is assigned.	Lookup	
Potential Name*	Specify name of the potential. This field is mandatory.	Text box	Alphanumeric(120)
Account Name*	Select name of the account to which potential has to be created. This field is mandatory.	Lookup	-
Type	Select the type of potential (New Business or Existing Business) from the drop-down list.	Pick list	-
Lead Source	Select the lead source from the drop-down list	Pick list	-
Campaign Source	Select the campaign related to the contact.	Lookup	-
Contact Name	Select the contact related to the Potential.	Lookup	
Amount	Specify the amount that can be expected after closing the potential.	Currency	
Closing Date*	Specify or select the expected close date. This field is mandatory.	Date format	-
Next Step	Specify the next step of the sales process.	Text box	Alphanumeric(100)
Stage*	Select the sales stage from the drop-down list. This field is mandatory.	Pick list	-
Probability	Specify the probability of closing an potential.	Number	
Expected Revenue	Calculated based on the Amount and potential Stage that you specify	Currency	
Created By	Displays name of the user created the potential first time.	Date/Time	-
Modified By	Displays name of the user modified the	Date/Time	

	potential		
Description	Specify any other details about potential.	Text area (long text)	32000 characters

Campaigns

Field Name	Description	Data type	Maximum Limit
Campaign Owner	Select the name of the user to whom the campaign is assigned.	Pick list	-
Campaign Name*	Specify the name of the campaign.	Text box	Alphanumeric(40)
Type	Select the type of the campaign.	Check box	-
Status	Select the status of the campaign.	Pick List	-
Start Date	Specify the date on which the campaign starts.	Date format	-
End Date	Specify the date on which the campaign ends.	Date format	-
Expected Revenue	Specify the revenue expected after launching the campaign.	Currency	-
Actual Cost	Specify the actual amount spent on the campaign.	Currency	-
Budgeted Cost	Specify the planned amount to be spent on the campaign.	Currency	-
Expected Response	Specify the campaign turnout percentage.	Number	
Num sent	Specify the number of leads/contacts to whom the campaign details has been sent.	Text box	Integers
Created By	Displays name of the user created the campaign first time.	Date/Time	-
Modified By	Displays name of the user modified the campaign	Date/Time	
Description	Specify additional details about the campaign.	Text area	32000 characters

Forecasts

Field Name	Description	Data type	Maximum Limit
Year*	Select the fiscal year from the drop-down list.	Pick list	-
Quarter*	Select the quarter of the fiscal year.	Pick list	-
Month	Display the month of the selected quarter.	Month	
Quota	Specify the quota for the month.	Currency	-
Closed	Display the amount from the closed won potentials.	Currency	-
Committed Amount	Specify the total amount a sales person confident of closing during forecast period.	Currency	-
Best Case Amount	Specify the amount a sales person might be closing. This amount can be either more or less than Commit Amount.	Currency	-
Pipeline	Displays the amount in the sales pipeline.	Currency	-
Owned By	Displays the owner of the forecast.	Lookup	-
Created By	Displays the person created the forecast first time.	Date/Time	-

| | | format | |
| Last Modified By | Displays the person modified the forecast. | Date/Time format | - |

Cases

Field Name	Description	Data type	Maximum Limit
Case Number	Display the case ID after creating a case.	Number	16 digit
Product Name	Select the product name related to the case.	Lookup	-
Case Owner	Select the name of the user to whom the case is assigned.	Lookup	-
Subject*	Specify the title of the Case. This field is mandatory.	Text box	Alphanumeric(255)
Priority	Select the priority of the Case from the drop-down list.	Pick list	-
Status*	Select the status of the Case from the drop-down list.	Pick list	-
Reported By	Displays the name of the contact.	-	-
Related To	Select the name of the contact who submitted the Case.	Lookup	-
Type	Select the type of problem. It can be a general question, feature request, or real issue in your product/service.	Pick list	-
Case Origin*	Select the source from which the case has been generated. You can select Email, Phone, or Website. If you select Email, you must specify the Email ID of the customer.	Pick list	-
Email	Specify the Email ID of the contact.	Email	Alphanumeric and Special characters
Account Name	Select the account related to the case	Lookup	
Potential Name	Select the Potential related to the case	Lookup	
Phone	Specify the phone number of the customer	Text box	Alphanumeric(50)
Case Reason	Specify the reason for the case	Pick list	-
Description	Specify complete details about the case.	Text Area	32000 characters
Internal Comments	Specify follow-up notes about case.	Text Area	3000 characters
Solution	Specify the solution provided	Text Area	32000 characters
Add Comment	specify the follow-up notes about the solution	Text Area	32000 characters

Solutions

Field Name	Description	Data type	Maximum Limit
Solution Number	Display the case ID after creating a solution	Number	16 digit
Solution Title*	Specify the subject of the solution.This field is mandatory	Text box	Alphanumeric(255)
Solution Owner	Select the name of the user to whom the solution is assigned.	Pick list	-
Product Name	Select the name of the product to which the solution has to be associated.	Lookup	-
Question*	Select the priority of the solution from the drop-down list.This field is mandatory	Text box, Alphanumeric	Alphanumeric(255)
Answer*	Specify solution details.This field is mandatory	Text Area	-
Status	Specify the status of the solution.	Pick list	-
Created By	Displays the person created the solution first time.	Date/Time format	
Last Modified By	Displays the person modified the solution	Date/Time format	
Description	Specify any other details about solution.	Text box	32000 characters
Comments	Specify additional comments about the solution.	Text box	32000 characters

Products

Field Name	Description	Data type	Maximum Limit
Product Name*	Specify the name of the product. This field is mandatory.	Text box	Alphanumeric(50)
Product Owner	Select the name of the user to whom the product is assigned.	Pick list	
Product Code	Specify the product identification.	Text box	Alphanumeric(40)
Product Active	Specify the status of the product.	Check box	-
Vendor Name	Specify the name of the vendor.	Lookup	
Product Category	Select the category of the product.	Pick list	
Sales Start Date	Specify the date on which the product sales starts	Date	
Sales End Date	Specify the date on which the product sales ends	Date	
Created By	Displays the person created the product first time.	Date/Time format	
Modified By	Displays the person modified the product	Date/Time format	
Commission Rate	Specify the commission rate for selling the product.	Numeric	Decimal

Manufacturer	Select the name of the product manufacturer.	Pick list	-
Unit Price	Specify the unit price of the product.	Currency	
Taxable	Specify whether the product is a taxable product	Check-box	
Product Category	Select the category of the product.	Pick list	-
Support Start Date	Select the date on which the product support starts.	Date	-
Support Expiry Date	Select the date on which the product support ends.	Date	-
Usage Unit	Displays the unit price of the product.	Text box	Alphanumeric
Qty Ordered	Specify the number of units.	Text box	Integers
Qty in Stock	Displays the stock quantity	Text box	Integers
Reorder Level	Specify the Reorder value	Text box	Integers
Handler	Select the SalesGrow CRM user who is handling the product	Lookup	
Qty in Demand	Displays the demand quantity	Text box	Integers
Description	Specify any other details about product.	Text area (long text)	32000 characters

Price Books

Field Name	Description	Data type	Maximum Limit
Price book Owner	Select the name of the user to whom the price book is assigned.	Lookup	-
Price book Name*	Specify the name of the Price Book. This field is mandatory.	Text box	Alphanumeric(50)
Active	Select the Active check box to set the status of the Price Book as active.	Check box	-
Pricing Model	Select the model of the price book	Pick list	-
Created By	Displays the person created the Price book first time.	Date/Time format	
Modified By	Displays the person modified the Price book.	Date/Time format	
Description	Specify any other details about Price Book.	Text area (long text)	32000characters
Pricing details • From Range • To Range • Discount	Specify the Pricing details	• From Range - Text box • To Range - Text box • Discount - Percent	Decimal (20)

Quotes

Field Name	Description	Data type	Maximum Limit
Quote Owner	Select the name of the user to whom the quote is assigned.	Lookup	-
Subject*	Specify the name of the quote. This field is mandatory.	Text box	Alphanumeric(50)
Potential Name	Specify the potential name for which the quote has to be created.	Text box	Alphanumeric(40)
Quote Stage	Specify the status of the quote.	Check box	-
Valid Till	Specify the date till the quote is valid after sending to the prospective customer.	Date	-
Contact Name	Specify the contact to which the quote has to be created.	Lookup	-
Account Name	Specify the account to which the quote has to be created.	Lookup	
Carrier	Select the name of the carrier manufacturer.	Pick list	-
Shipping	Select the category of the quote.	Text box	Alphanumeric(50)
Inventory Manager	Specify the person responsible for shipping the shipment to the account or contact.	Text box	Alphanumeric(50)
Account Name*	Specify the account name to which the quote has to be created. This field is mandatory	Lookup	
Created By	Displays the person created the Price book first time.	Date/Time format	
Modified By	Displays the person modified the Price book.	Date/Time format	
Billing Address • Street	Specify the primary address of the contact.	• Street - Text box • City - Text	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30)

		box • State - Text box • Code - Text box • Country- Text box	• Alphanumeric(30) • Alphanumeric(30)
Shipping Address • Street • City • State • Zip • Country	Specify the shipping address of the contact (if any).	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Product Name *	Select the product name.This field is mandatory	Lookup	-
Quantity in Stock	Displays the stock quantity.	Numeric	Integers
Quantity*	Specify the quantity for which the sales order has to be generated. This field is mandatory	Numeric	Integers
Unit Price*	Displays the unit price of the product.	Currency	
List Price*	Select the product list price from Price Book or specify the product price. This field is mandatory	Lookup and Numeric	Integers
Total	Displays the amount of the selected products.	Text box	Alphanumeric
Terms & Conditions	Specify the terms and conditions that are associated with quote.	Text area	
Description	Specify any other details about quote.	Text area	32000 characters

Sales Orders

Field Name	Description	Data type	Maximum Limit
Sales Order Owner	Select the name of the	Lookup	

	user to whom the sales order is assigned.		
SO Number	Display the Sales order ID after creating a case.	Number	16 digit
Subject*	Specify the name of the sales order. This field is mandatory.	Text box	Alphanumeric(50)
Potential Name	Select the potential for which the sales order has to be generated.	Lookup	-
Customer No	Specify the customer identification number (if any)	Text box	Alphanumeric(50)
Purchase Order	Select the reference purchase order.	Text box	-
Quote Name	Select the reference quote.	Lookup	-
Contact Name	Select the contact for which the sales order has to be generated.	Lookup	-
Due Date	Select the date	Date	-
Carrier	Select the carrier's name that ships the products from your warehouse to customer site.	Pick list	-
Pending		Text box	Alphanumeric(50)
Status	Specify the status of the sales order.	Pick list	-
Sales Commission	Specify the commission to the sales person upon closing the deal.	Numeric	float
Excise Duty	Specify the excise duty for the shipment	Text Box	Numeric
Account Name*	Specify the account name to which the sales order has to be created.This field is mandatory	Lookup	-
Assigned To	Select the user's name to whom the sales order handling duty is assigned.	Select option	-
Created By	Displays name of the user created the Sales order first time.	Date/Time	

Modified By	Displays name of the user modified the Sales order	Date/Time	
Billing Address • Street • City • State • Zip • Country	Specify the primary address of the contact.	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country- Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Shipping Address • Street • City • State • Zip • Country	Specify the shipping address of the contact (if any).	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Product Name *	Select the product name.This field is mandatory	Lookup	-
Quantity in Stock	Displays the stock quantity.	Numeric	Integers
Quantity*	Specify the quantity for which the sales order has to be generated. This field is mandatory	Numeric	Integers
Unit Price*	Displays the unit price of the product.	Currency	
List Price*	Select the product list price from Price Book or specify the product price. This field is mandatory	Lookup and Numeric	Integers
Tax	Specify the tax component of the products	Currency	-
Adjustments	Specify if there are any adjustments, such as	Currency	-

	discounts, or extra charges etc.		
Total	Displays the amount of the selected line item.	Currency	-
Terms & Conditions	Specify the terms and conditions that are associated with sales order.	Text area (long text)	
Description	Specify any other details about sales order.	Text area (long text)	32000 characters

Invoices

Field Name	Description	Data type	Maximum Limit
Invoice Owner	Select the name of the user to whom the invoice is assigned.	Lookup	
Invoice Number	Display the case ID after creating a solution	Numeric	16 digit
Subject*	Specify the name of the invoice. This field is mandatory.	Text box	Alphanumeric(50)
Sales Order	Select the reference Sales order (if any).	Lookup	-
Purchase Order	Select the reference Purchase order.	Text Box	
Customer No	Specify the customer identification number (if any).	Text box	Alphanumeric(50)
Excise Duty	Specify the excise duty for the shipment	Text box	Numeric
Invoice Date	Specify the date on which the invoice is created.	Date	-
Due Date	Specify the invoice due date as per your payment terms.	Date	-
Sales Commission	Specify the commission to the sales person upon closing the deal.	Currency	Float
Account Name *	Specify the account name to which the invoice has to be created. This field is mandatory	Lookup	-
Contact Name	Specify the contacts	Lookup	

	name to which the invoice has to be created.		
Status	Specify the status of the invoice.	Check box	-
Assigned To	Select the user's name to whom the invoice handling duty is assigned.This field is mandatory	Lookup	-
Created By	Displays the person created the Price book first time.	Date/Time format	
Modified By	Displays the person modified the Price book.	Date/Time format	
Billing Address • Street • City • State • Zip • Country	Specify the primary address of the contact.	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country- Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Shipping Address • Street • City • State • Zip • Country	Specify the shipping address of the contact (if any).	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Product Name *	Select the product name.This field is mandatory	Lookup	-
Quantity in Stock	Displays the stock quantity.	Numeric	Integers
Quantity*	Specify the quantity for which the sales order has to be generated.	Numeric	Integers

	This field is mandatory		
Unit Price*	Displays the unit price of the product.	Currency	
List Price*	Select the product list price from Price Book or specify the product price. This field is mandatory	Lookup and Numeric	Integers
Total	Displays the amount of the selected products.	Currency	-
Terms & Conditions	Specify the terms and conditions that are associated with invoice.	Text area	
Description	Specify any other details about invoice.	Text area	32000 characters

Vendors

Field Name	Description	Data type	Maximum Limit
Vendor Owner	Select the name of the user to whom the Vendor details is assigned.	Lookup	
Vendor Name*	Specify the name of the vendor. This field is mandatory	Text box	Alphanumeric(50)
Phone	Specify the phone number of the vendor	Text box	Alphanumeric(40)
E-mail	Specify the E-mail ID of the vendor	Email	Alphanumeric and Special characters(100)
Website	Specify the Web site URL of the vendor	URL	Alphanumeric and Special characters(50)
GL Account	Select the general ledger account	Pick List	-
Category	Specify the category of the vendor	Text box	Alphanumeric(40)
Created By	Displays the person created the Price book first time.	Date/Time format	
Modified By	Displays the person modified the Price book.	Date/Time format	
Vendor Address • Street • City	Specify the address of the vendor	• Street - Text box • City - Text box • State - Text	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)

		box	• Alphanumeric(30)
• State • Postal Code • Country		• Code - Text box • Country- Text box	
Description	Specify any other details about vendor	Text area (long text)	32000 characters

Purchase Order

Field Name	Description	Data type	Maximum Limit
Purchase Order Owner	Select the name of the user to whom the purchase order is assigned.	Lookup	
PO Number	Display the Sales order ID after creating a case.	Number	16 digit
Subject*	Specify the name of the purchase order. This field is mandatory.	Text box	Alphanumeric(50)
Vendor Name*	Specify the name of the vendor.	Text box	Alphanumeric(20)
Requisition No	Specify the number in which the purchase order is requested	Text box	Alphanumeric(20)
Tracking Number	Specify the number to track the purchase order	Text box	
Contact Name	Specify the contacts name to which the invoice has to be created.	Lookup	
Carrier	Select the carrier's name that ships the products from your warehouse to customer site.	Pick list	-
Purchase Order Date	Specify the date on which purchase order is created.	Date	-
Due Date	Select the due date.	Date	-
Excise Duty	Specify the excise duty for the shipment	Text box	
Sales Commission	Specify the commission to the sales person upon closing the deal.	Currency	Float

Status	Specify the status of the purchase order.	Check box	-
Assigned To	Select the SalesGrow CRM user name to whom the purchase order handling duty is assigned. This field is mandatory	Select option	-
Created By	Displays the person created the Price book first time.	Date/Time format	
Modified By	Displays the person modified the Price book.	Date/Time format	
Billing Address • Street • City • State • Zip • Country	Specify the primary address of the contact.	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country- Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Shipping Address • Street • City • State • Zip • Country	Specify the shipping address of the contact (if any).	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Product Name *	Select the product name.This field is mandatory	Lookup	-
Quantity in Stock	Displays the stock quantity.	Numeric	Integers
Quantity*	Specify the quantity for which the sales order has to be generated. This field is mandatory	Numeric	Integers
Unit Price*	Displays the unit price	Currency	

188

	of the product.		
List Price*	Select the product list price from Price Book or specify the product price. This field is mandatory	Lookup and Numeric	Integers
Total	Displays the amount of the selected products.		
Terms & Conditions	Specify the terms and conditions that are associated with purchase order.	Text area (long text)	
Description	Specify any other details about purchase order.	Text area (long text)	32000 characters

Tasks

Field Name	Description	Data type	Maximum Limit
Task Owner	Select the name of the user to whom the task is assigned.	Lookup	
Subject*	Specify the name of the task. This field is mandatory.	Text box	Alphanumeric(50)
Due Date	Specify the due date for the task	Date	
Contacts/Leads	Select the related contact or lead	Lookup	
Accounts	Select any other record related to the task	Lookup	-
Status	Specify the status of the task	Pick List	-
Priority	Select the due date.	Date	-
Send Notification Email	Select the check box to send notification email to the task owner	Check box	
Remind At	Select the check box to set reminder for the task	Check box	
Recurring Activity	Select the check box to mark it as a recurring activity	Check box	-
Description	Specify the details about the task	Text area (long text)	32000 characters

Events

Field Name	Description	Data type	Maximum Limit
Event Owner	Select the name of the user to whom the event is assigned.	Lookup	
Subject*	Specify the name of the event. This field is mandatory.	Text box	Alphanumeric(50)
Start Date Time*	Specify the date and time when the event will be started. This field is mandatory.	Date and Time	
End Date Time *	Specify the date and time when the event will be over. This field is mandatory.	Date and Time	

Venue	Enter the venue for the event	Text	
Contacts/Leads	Select the related contact or lead	Lookup	
Accounts	Select any other record related to the event	Lookup	-
Send Notification Email	Select the check box to send notification email to the event owner	Check box	
Remind At	Select the check box to set reminder for the event	Check box	
Recurring Activity	Select the check box to mark it as a recurring activity	Check box	-
Description	Specify the details about the event	Text area (long text)	32000 characters

Calls

Field Name	Description	Data type	Maximum Limit
Subject*	Specify the subject of the call. This field is mandatory.	Text box	Alphanumeric(50)
Call Type*	Choose whether the call is inbound or outbound		
Call Purpose	Select the purpose of the call	Pick List	
Call From/To	Choose Contact or Lead		-
Related To	Select the record to which the call is related to	Pick List	-
Call Details	Select whether it is a Current call or Completed call		-
Call Start Time	Automatically displays the call start data and time	Pick List	
Call Duration	Specify the duration of the call	Integer	
Description	Specify the details about the task	Text area (long text)	32000 characters
Billable	Select the check box if the call is considered for billing	Check box	
Call Result	Enter the call result	Text	

7.4.2 Custom Fields

For almost all of the fields that you create, you need to specify the following:

- **Label**: Specify a name for the field.
- **Section Name**: Choose a section under which the field should be listed. Whenever required, you can change the placement of the field in any other section.

Other specifications required for each type of field:

Field Type	Other Details
Text	Length: Maximum 255 characters are allowed.
Integer	Length: Maximum 9 digits are allowed.
Decimal	Length: Maximum 16 digits (including decimal places) are allowed.

190

Percent	Label: Specify the field name
Currency	Length: Maximum 16 digits are allowed. **Rounding Option**: Specify the rounding option **Decimal Places**: Specify the number of decimal places Precision: Specify the rounding precision
Date	Format: YYYY/MM/DD Note:Date format will be changed according to user's time zone settings.
Date & Time	Format: YYYY/MM/DD HH:MM Note:Date format will be changed according to user's time zone settings.
Email	Specify a valid email address
Phone	Specify a valid phone number
Pick list	Pick List Values: Specify the pick list values
Multi-select Pick list	Pick List Values: Specify the pick list values
URL	-
Text Area	Specify the Character limit: Small is 2000 characters, Large is 32000 characters. Text Area Large will not be available while adding criteria in any feature. Both Text Area Large and Small cannot be used for sorting records in ascending or descending order.
Check box	-
Auto Number	Prefix: Specify the prefix of the auto-number sequence Starting Number: Specify the starting number of the sequence Suffix: Specify the suffix of the auto-number sequence Existing Records: Select the check-box to apply auto-number to existing records.
Lookup	Lookup Type: Select the module for which you like to establish relationship Related List Label: It is the name you give to the entity that will be created under the record's details. For example, Attachments, Contact Roles etc.
Long Integer	Maximum 18 characters are allowed

Custom Field Limits

There is a limit to the total number of fields that you can create in you account and also a limit to the type of fields that you create. This varies based on your SalesGrow CRM Edition.

Add Custom Fields

In each module, you can add custom fields to capture important data specific to your business requirements by specifying some field-related information.

Availability

Profile Permission Required: Users with the Field-level Access permission in profile can access this feature.

To add custom fields

1. Log in to SalesGrow CRM with Administrator's privileges.
2. Click **Setup** > **Customization** > **Fields**.
3. Select the module from the drop-down list and click **New Custom Field**.

4. In the *New Custom Field page*, do the following:

o   In the **Select Field Type** section, select the field type.

o   In **Provide Field Details** section, specify the field details. (Refer to the table above)

5.   Click **Save**.

Note

- The **Also create for Accounts, Contacts, Potentials** option will be available only while creating fields for Leads.
- The **Also create for Sales Orders, Invoices** option will be available only while creating fields for Quotes.
- Once the field is created, you cannot change the 'data type' of the field. For example, an Integer (digits) field cannot be changed into a *Currency field*.
- You can edit the custom fields to change the length of the following types of fields. - Currency, Text, Number (Integer), Decimal, Phone, Long Integer and URL.
- You cannot add custom fields in the **Log a Call** page. However, you can customize the existing fields using page layout customization.

To edit custom fields

1. Click **Setup** > **Customization** > **Fields**.
   Module refers to the Leads, Accounts, Contacts, etc. tabs.
2. Select the module from the drop-down list.
   All the existing fields in the selected module will be listed.
3. Click the **Edit** link for the corresponding field that you want to edit.

Delete Custom Fields

The fields that you have created can be deleted, in case you do not need them. Please note that standard fields cannot be deleted and when you delete a custom field, the associated data will also be deleted from SalesGrow CRM. If you do not want to delete the field, you can also hide it so that it is not used by users.

To delete custom fields

1. Click **Setup** > **Customization** > **Fields**.
   Module refers to the Leads, Accounts, Contacts, etc. tabs.
2. Select the module from the drop-down list.
   All the existing fields in the selected module will be listed.
3. Click the **Delete** link for the corresponding field that you want to delete.
4. Make sure to read the instructions in the pop-up box and then click **Yes, Delete now** to delete the field.

Create Currency Fields

The currency field allows you to define the decimal and the precision settings based on your selected currency locale. There are four rounding options available for a currency field in SalesGrow CRM:

Option	Amount	Decimal Places	Precision	Result
Normal	1234.123	3	X	1234.12
	1234.567	3	X	1234.57
Round Off	1234.123	3	2	1234.12
	1234.567	3	2	1234.57
Round Down	1234.123	3	2	1234.12
	1234.567	3	2	1234.56
Round Up	1234.123	3	2	1234.13
	1234.567	3	2	1234.57

Currency Type Custom Fields

To create currency custom fields

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Fields**.
   Module refers to the Leads, Accounts, Contacts, etc. tabs.
3. Select the module from the drop-down list and click **New Custom Field**.
4. In *[Module] New Custom Field* page, select **Currency** from the Field Type list.
5. In the *Field Details* section, do the following:
   - o   Enter a name in the **Label** field.

   - o   Select the **Section Name** from the drop-down list where the field should be displayed.
   - o   In the **Length** field, type the desired **length** of the total number of digits.
   - o   Select the **Rounding option** from the drop-down list.
   - o   In the **Decimal Places**, type the number of decimal places you require.
6. Click **Save**.

Add Pick List Values

By default, some of the industry standard pick list values are available in each module. You can modify the pick list values as per your organization's business process and replace the existing value with new values so that the records are associated correctly.

To add or modify pick list values

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Field**.
   Module refers to the Leads, Accounts, Contacts, etc. tabs.
3. Select the module from the drop-down list and click the **Edit** link for the corresponding pick list field.
4. In the *Edit Pick List* page, you can do the following:
   - o Click **Add New Values**.

   - o Select the check box to **use first value as default value**.
   - o Click **Sort values alphabetically**, not in the order entered.

   - o Click   to delete the value.
5. Click **Save**.

Note

- When you edit the value(s), it will not be automatically updated in the records where it is used. You need to individually select the records and update the pick list field.
- When you delete a pick list value, records that have the field value associated to it will not be deleted.

To replace pick list values

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Field**.
   Module refers to the Leads, Accounts, Contacts, etc. tabs.
3. Select the module from the drop-down list and click the **Replace** link for the corresponding pick list field.
4. In the **Find and Replace** pick list page, do the following:
   o Select an existing value that needs to be replaced.
   o Enter a value that is to be replaced with another value.

5. Click **Save**.

Note

- When you replace the value(s), **it will be automatically updated** in the records where it is used. You need not individually select the records and update the pick list field.

Add Multi-Select Pick List Values

This option enables selecting multiple values while creating or editing record. For instance, your organization may be offering different services and some of your customers may be interested in multiple services. In this case you can use the multi-select pick list value instead of single pick list value while creating a potential. Periodically, you can modify the pick list values as per your organization's business process.

To add multi-select pick list values

1. Log in to SalesGrow CRM with Administrator privileges.

2. Click **Setup** > **Customization** > **Field**.
   Module refers to the Leads, Accounts, Contacts, etc. tabs.
3. Select the module from the drop-down list and click **New Custom Field**.
4. In the *[Module] New Custom Field* page, select **Multi-select Pick List** from the field type list.
5. In the *Field Details* section, do the following:
   - o Enter a name in the **Label** field.
   - o Select the **Section Name** from the drop down list where the field should be displayed.

Field Information

Select Field Type:

| ab| Text
| 99 Integer
| % Percent
| 0·00 Decimal
| $ Currency
| 1 Date
| DateTime
| Email
| Phone
| Pick List
| URL URL
| ab| TextArea
| TRUE FALSE Checkbox ①
| **Multiselect Pick List**
| 123 Auto Number
| Lookup
| f Formula
| 9…9 Long Integer

Provide Field Details: ②

Label: Area of Interest

Section Name: Lead Information

Pick List Values: Sales Management
Document Management
Invoice Management
HR Management ③

☐ Use first value as default value.

Also create for: ☐ Accounts
☐ Contacts
☐ Potentials

   - o Specify the pick list values.
   - o Select the check box to **use first value as default value**.
6. Click **Save**.

Note

- When you delete a pick list value, records that have the field value associated to it will not be deleted.

Create Lookup Field

The lookup field helps in establishing relationship between different modules (linking two different modules: Accounts with Contacts) or establishing parent-child relationship with a module. Note that lookup fields cannot be created for Tasks and Events.

Examples of Parent-Child Relationship:

1. Parent Account - Member Accounts (Doing business with Head Quarter Company and multiple divisions within the company)
2. Contact - Member Contacts
3. Case - Sub Case
4. Potential - Part Payment
5. Product - Part Products
6. Solution - Related Solutions

Availability

 Profile Permission Required: Users with the Field-level Access permission in profile can access this feature.

Check Feature Availability and Limits

To create lookup field

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Field**.
   Module refers to the Leads, Accounts, Contacts, etc. tabs.
3. Select the module from the drop-down list and click **New Custom Field**.
4. In *[Module] New Custom Field* page, select **Lookup** from the Field Type list.
5. In the *Field Details* section, do the following:

- o Enter a name for the lookup field in the **Label** text box. (Eg. *Interested Products*. This field will be available while creating a lead.)

- o Select the **Section Name** from the drop-down list where the field should be displayed. (Eg. *Lead Information*)
- o Select a module from the **Lookup Type drop-down**. In the field, data from the module selected here, will be listed. (Eg. *Products*. The lookup field will list all the products)
- o Enter the **Related List Label**. (Eg. *Interested Leads*. A related list will be created for the records in the Products module.)
6. Click **Save**.

Create Auto Number Field

The auto number type custom field helps classifying the records by unique numbers. Once the auto number field is added to the CRM module, the number is added sequentially to the new records. This can be used to update the existing records also. For instance, Invoice Number, Quote Number and Sales Order.

Availability

Profile Permission Required: Users with the Field-level Access permission in profile can access this feature.

Check Feature Availability and Limits

To create auto number fields

1. Log in to SalesGrow CRM with Administrator privileges.
2. Click **Setup** > **Customization** > **Fields**.
    Module refers to the Leads, Accounts, Contacts, etc. tabs.
3. Select the module from the drop-down list and click **New Custom Field**.
4. In *[Module] New Custom Field* page, select **Auto Number** from the Field Type list.
5. In the *Field Details* section, do the following:

o   Enter a name in the **Label** field.

o   Select the **Section Name** from the drop-down list where the field should be displayed.
o   Select the **Lookup Type** i.e. the data that should be listed in the lookup.
o   Enter the **Prefix, Starting Number** and the **Suffix** for the auto number value.
6.   Click **Save**.

Map Dependency Fields

There are certain fields whose values depend on another field's value. For example, the values in the State field will depend on the country that you select from the Country field. Similarly, the values for the Sub-Department field will depend on the Department field that you select. You can define this parent-child relationship in two drop down fields.

To map field dependencies

1.   Click **Setup** > **Customization** > **Fields**.
     Module refers to the Leads, Accounts, Contacts, etc. tabs.
2.   Select the module from the drop-down list and click **Map Dependency Fields**.

3. In the *Map Dependency Fields* page, click **New**.
   o Select the **Parent Field** from the drop-down list.
   o Select the **Child Field** from the drop-down list.

*Parent Field	Industry ⬍
*Child Field	Area of Interest ⬍
	Next Cancel

   o Click **Next**.
   o Select the values for each parent field value.
   o For example, if the parent field is **Country**, then, select the **States** for the selected country.
   o Click the **Previous** or **Next** links, if required, to map the all the Parent field values to the Child field values.
4. Click **Save**.

7.4.3 Special Fields

Customize Tax Rates

The Tax Rate field allows defining different types of tax rates for the products you sell to your customers. Once the tax rates are added, you can select the tax type and rate while creating a quote, order, or invoice for the customers. For instance, Sales Tax = 10.5 %; VAT = 1%; etc.

Availability

Profile Permission Required: Users with the Field-level Access permission can access this feature.

Check Feature Availability and Limits

To add Tax Rates

1. Log in to SalesGrow CRM with Administrator privileges.

2. Click **Setup** > **Customization** > **Fields** > **Products** > **Customize Tax Rate**.

3. In the *Customize Tax Rates* page, click **Add Tax**.

4. Specify the type of tax and tax rate **in Tax Label** and **Tax Value** fields respectively.
5. Click **Save**.

To use Tax Rates

1. Click the **Invoice** tab.
2. In the *Invoice Home* page, click **New Invoice**.
3. In the *New Invoice* page, specify the customer and product details.

4. In the *Product Details* section, click **Tax** (after sub totaling the line items).

5. In the *Group Tax* box, select the default tax rates or specify the new rates.
6. Click **Save**.

Map Stage-Probability values

Defining the criteria for Sales Stage is important to identify the performance of an organization-wide Sales pipeline. Stage probability can be determined based on two important factors - **Forecast Type** and **Forecast Category**. These two values are useful in describing the stage of a potential.

In the Stage-Probability mapping page you can perform the following operations:

- Create different types of Sales stages according to your organization-wide Sales process.
- Associate Probability values to the Sales stages.
- Associate Forecast types (Open, Closed-won, or Closed-lost) to Sales stages.
- Associate Forecast categories (Pipeline, Closed, Omitted, Best Case, Committed)

Note

- For a better sales pipeline analysis assign different probabilities to sales stage values.
- For each stage assign probability in the range of 0 to 100.
- You may consider using probability value as 100 when the deal is closed-won and 0 for deal closed-lost.

To map stage and probability values

1. Log in to SalesGrow CRM with Administrator privileges.

2. Click **Setup** > **Customization** > **Fields** > **Potentials** > **Stage-Probability Mapping.**

New Custom Field	Map Dependency Fields	Stage-Probability Mapping	Contact Roles
Action	Label		Data Type
	Account Name		Lookup
Edit | Delete	Activity notification		Text
Edit	Amount		Currency

3. In the *Stage-Probability Mapping* page, do the following:
   o Add the sales **Stage** (s) and the corresponding **Probability** of closing the sales deal
   o Delete sales **Stage** (s) and assign the existing **Probability** to another Sales Stage value

Field Information:

Field Name: **Stage**

Options List: ⊕ Add Stage | ✖ Delete Stage

	Stage Name	Probability (%)	Sort Order	Forecast Type	Forecast Category
☐	-None-	0	1	Open ⬍	Pipeline ⬍
☐	Qualification	10	2	Open ⬍	Pipeline ⬍
☐	Needs Analysis	20	3	Open ⬍	Pipeline ⬍
☐	Value Proposition	40	4	Open ⬍	Pipeline ⬍
☐	Id. Decision Makers	60	5	Open ⬍	Pipeline ⬍
☐	Proposal/Price Quote	75	6	Open ⬍	Pipeline ⬍
☐	Negotiation/Review	90	7	Open ⬍	Pipeline ⬍
☐	Closed Won	100	8	Closed Wor ⬍	Closed ⬍
☐	Closed Lost	0	9	Closed Los ⬍	Omitted ⬍
☐	Closed Lost to Competitic	0	10	Closed Los ⬍	Omitted ⬍

Save   Cancel

   o To modify the existing Sales Stages, use the **Replace** option.
4. Click **Save**.

Note

- For a better sales pipeline analysis assign different probabilities to sales stage values.
- For each stage assign probability in the range of 0 to 100.
- You may consider using probability value as **100** when the deal is closed-won and **0** when the deal is closed-lost.

7.5 Templates

Create customized email templates, inventory templates and mail merge templates.

7.5.1 Email Templates

Create Email Templates

You can create Email templates for sending Emails to the customers (leads and contacts), and SalesGrow CRM users within your organization.

To create an email template

1. Click **Setup** > **Templates** > **Email Template**.
2. In the *Email Templates* page, click **New Template**.
3. In the *New Template* page, select the **Record Type** from the drop-down list.
4. Enter the **Template Name**.
5. Select the Template Folder from the **Store Under** drop-down list.
6. For the template, add the **From**, **Subject** etc. details. (refer to the table below)
7. In the **Email Template Body** section, create the Email message body by incorporating the fields from various modules:
   o Select the required fields from the **Available Merge fields** drop-down list.
   o Select the relevant field name based on the category (User, Organization, or Specific Module).
   o Copy the field (for example, $contacts_firstname) from the **Copy Merge Field value** and paste it in the body of the email template.
     You can also provide merge fields for the **Subject** of the email template.
8. **Footer:** As per the CAN SPAM Act, provide an **Unsubscribe form** (Opt-out) link for users to remove their Email ID from your mass mailing list.
9. Click **Preview** to view your email.
10. Click **Save**.

Note

- You can create a template with 64000 characters.
- You can give a link to your video in your email template. You cannot embed the video in the template itself.
- If you are creating an email template for sending emails to leads, do not merge the contact-related fields and vice versa.
  If you try to merge both fields, you will experience errors while creating the email template.
- Email Templates are Record specific. It is created for a specific record type.
  For example, you can create a template for leads or contacts. When you send emails to leads, only the templates created for lead records will be available.

List of Standard Fields

Field Name	Description	Data Type
Record Type	Displays the record type for the email template	Text box
Template Name	Specify the name of the email template.	-
Store Under	Select one of the available folders.	Drop-down
From	Specify the sender Email ID to receive reply Emails.	Drop-down
Reply To	Specify the Email ID to which you want to receive the replies from your recipient.	Text box
Subject	Specify the subject to be displayed while sending Email to recipients.	Text box
Add User Signature	Select the check box to add user signature	Check box
Attachment	Attach file with the Email (max file size: 3 MB)	-

Sample Email Template

Dear $leads_salutation $leads_firstname $leads_lastname,

Thank you for your interest in SalesGrow CRM.
We welcome your suggestions and comments in improving the product further.

Sincerely,
<$User_Name>

Email Output

Dear Mr. Larry King,

Thank you for your interest in SalesGrow CRM.
We welcome your suggestions and comments in improving the product further.

Sincerely,
SalesGrow CRM Team

Create Newsletter templates

1. First, create a Newsletter in Adobe Dreamweaver or any other HTML Editor and upload all images/CSS used in the newsletter template to your Website.
2. In SalesGrow CRM, click **Setup** > **Templates** > **Email Template**.

3. In the *Email Template* editor, click the **Edit HTML** icon

4. In the *Code View* mode, paste your Newsletter HTML code and click **Insert**.
5. Click **Save**.

Clone Email Templates

You can clone the existing email template and make the necessary changes to create a new template.

To clone an existing template

1. Click **Setup** > **Templates** > **Email Template**.
2. In the *Email Templates* page, click on the email template that you want to clone.
3. In the *View Email Template* page, click **Clone**.
4. In the *Clone Email Template* page, modify the details and make changes to the template.
5. Click **Save**.

Modify Email Templates

You can modify the existing email template by changing the required fields.

To modify email template

1. Click **Setup** > **Templates** > **Email Template**.
2. In the *Email Templates* page, click the **Edit** link corresponding to the email template.
3. In the *Edit Email Template* page, modify the email template details.
4. Click **Save**.

Delete Email Templates

Occasionally, you may need to remove some of the unnecessary Email templates from the SalesGrow CRM system for a better user experience. You may consider removing Email templates that are not useful for future reference. Please note that you cannot delete the email templates if it's being used in auto responders, etc.

To delete email template

1. Click **Setup** > **Templates** > **Email Template**.

2. In the *Email Templates* page, click the **Del** link corresponding to the email template.

Manage Email Template Folders

You can store all the Email templates in easy to access folders, which can be shared with other users.

To create email template folder

1. Click **Setup** > **Templates** > **Email Template**.
2. In the *Email Templates* page, click **New Template Folder**.
3. In the *Folder Details* do the following:
    o   Enter the **Folder Name**.

    o   Specify additional information about the folder in the **Description** text box.
    o   Under **Accessibility Details** select one of the following options:
        ▪   **All Users are allowed to view this Template Folder:** Select if you would like to enable the folder access for all the users.

- **Show this Template Folder only to me:** Select if you would like to enable the folder access only to you.
- **Allow the following users to view this Template Folder:** Select the users or user roles that can access the folder.

4. Click **Save**.

7.5.2 Inventory Templates

You can create Inventory templates for sending customized quotes, sales orders, invoices, and purchase orders to customers and your suppliers.

Inventory Modules

You can select the following primary modules and create templates by linking with other secondary modules:

- **Quotes:** Quotes, Products, Users, Organization, Accounts, Contacts, and Potentials.
- **Purchase Orders:** Purchase Orders, Products, Users, Organization, Vendors, and Contacts.
- **Sales Orders:** Sales Orders, Products, Users, Organization, Accounts, Contacts, and Potentials.
- **Invoices:** Invoices, Products, Users, Organization, Accounts, Contacts, and Potentials.

Special Instructions

- In the Inventory Template, "Product Name" is a mandatory field. If you are not adding this field products will not be listed.
- Ensure that tags for line items are present within **<tbody id="lineItem"> and </tbody>** tags.
- Use the **${companyLogo}** tag for embedding your Company Logo in a template.
- In addition to Inventory modules, you can merge fields from Users, Organization, Accounts, Vendors, Contacts, and Potentials modules in the template.
- A default template will be used in Print Preview, Export to PDF and Send Mail functions of Quotes, Orders, and Invoices.

Inventory Template Tags

While creating a template, you can use various tags from Users, Organization, Accounts, Contacts, Potentials, Vendors, Quotes, Sales Orders, Invoices, and Purchase Orders modules.

List of Standard Fields

Field Name	Tag	Description	Data Type
First Name	${User.First Name}	Specify the first name of the user.	Text box
Last Name	${User.Last.Name}	Specify the last name of the user. This field is a mandatory field.	Text box
Email	${User.Email}	Specify the official E-mail ID of the user. This is a mandatory field.	URL
Phone	${User.Phone}	Specify the official phone number of the user.	Pick list
Mobile	${Mobile}	Specify the mobile phone number of the user.	Text box, integer value
Fax	${User.Fax}	Specify the FAX number of the user.	Text box
Street	${User.Street}	Specify the primary address of the SalesGrow CRM user.	Text box
City	${User.City}	Specify the name of the city where the user lives.	Text box
State	${User.State}	Specify the name of the state where the user lives.	Text box
Zip	${User.Zip Code}	Specify the postal code of the user's address.	Text box, integer value
Country	${User.Country}	Specify the name of the user's country.	Text box

List of Organization-Related Tags

Field Name	Tag	Description	Data Type
Name	${Organization.Organization Name}	Specify your company name.	Text box
Phone	${Organization.Phone}	Specify the official phone number of your company.	Text box
Mobile	${Organization.Mobile}	Specify the mobile number of your	Text box

		company.	
Fax	${Organization.Fax}	Specify the FAX number of your company.	Text box
Website URL	${Organization.Website}	Specify your company Website URL.	URL
Street	${Organization.Street}	Specify the primary address of your company.	Text box
City	${Organization.City}	Specify the city in which your company is located.	Text box
State	${Organization.State}	Specify the state in which your company is located.	Text box
Postal Code	${Organization.Zip Code}	Specify the postal code of your company address.	Text box
Country	${Organization.Country}	Specify the name of the country in which your company headquarters is located.	Text box
Company Logo	${companyLogo}	Upload your company logo, which can be used as header in your quotes, orders, and invoices similar to letterhead. Maximum allowed size 188 x 80 px.	Browse Image
Description	${Organization.Organization Description}	Specify your company information.	Text Area

Customize Inventory Template

To customize an inventory template

1. Click **Setup** > **Templates** > **Inventory Templates**.
2. In the *Inventory Templates* home page, click **New Template**.
3. In the *Select Template Module* page, select the module from the **Record Type** drop-down list.
4. In the *New Template* page, do the following:
   o Specify the **Name** of the Email template.
   o **Select Folder** from the drop-down list.
   o Select **Set as Default** check box, if required.

   o Create the Template by incorporating the fields from modules. In the **Template Body** field, specify the following:

- Select the type of field from the **Field Type pick** list. You can select fields related to the module.
- Select the required fields from the **Available Merge fields** drop-down list.
- Copy the fields (for example, **${Quotes.Account Name}**) from the **Select Field** drop-down list. Copy the field value displayed in **Copy Merge Field value** text box and paste in Template Body text area.

Note:

> You can create a template with less than 32000 characters. If the template contains more than 32000 characters, extra characters will be truncated.

5. Click **Save**.

Delete Templates

Occasionally, you may need to remove some of the unnecessary inventory templates from the SalesGrow CRM system for a better user experience. You may consider removing inventory templates that are not useful for future reference.

To delete an inventory template

1. Click **Setup** > **Templates** > **Inventory Templates**.
2. In the *Inventory Templates* page, delete the required template by clicking the **Del** link.

Manage Template Folders

You can store all of the inventory templates in easy to access folders, which can be shared with other users.

To create an inventory template folder

1. Click **Setup** > **Templates** > **Inventory Templates**.
2. In the *Inventory Templates* page, click **New Template Folder**.
3. In the *Folder Details* do the following:
   - o Enter the **Folder Name**.
   - o Specify additional information about folder in the **Description** text box.

* Folder Name: Sales & Purchase

Description: Templates for quotes and invoices

Who can see this view ?

○ All Users are allowed to view this Email Template Folder.

○ Show this Email Template Folder only to me.

⦿ Allow the following users to view this Email Template Folder.

Select source type:

Groups

Available:

Accounting Group

Selected:

G: Sales Group

[Add]   [Del]

- o Under **Accessibility Details** select one of the following options:
  - **All Users are allowed to view this Template Folder:** Select if you would like to enable the folder access for all the users.
  - **Show this Template Folder only to me:** Select if you would like to enable the folder access only to you.
  - **Allow the following users to view this Template Folder:** Select the users or user roles that can access the folder.
- 4. Click **Save**.

8. Data Administration

The purpose of the SalesGrow CRM data administration tools are to guide the CRM Administrator in creating, verifying and ensuring data integrity by maintaining relationships and implementing access controls throughout the databases.

Based on the organization's requirement, user(s) with Administrator privilege can set up the CRM data administration. The specific operational procedures within SalesGrow CRM's data administration are explained below.

8.1 Reports & Dashboards

Create reports and pictorial representation of your custom report data, for a real-time snapshot of your organization's key metrics.

8.1.1 Reports

SalesGrow CRM reports are the detailed and informative list of records. Each report provides access to important data required for various purposes. In SalesGrow CRM, standard reports are provided in various modules, which can be either used as it is or customized further as per your business requirements.

Availability

 Profile Permission Required: Users with the Reports & Dashboard permissions can access this feature.

SalesGrow CRM provides more than 40 different standard reports for the users' benefit. These reports are distributed across different modules in SalesGrow CRM. You can use the standard reports or customize them as per your business requirements. Please note that we do not provide reports for Price Books.

List of Some of the Standard Reports

Report Name	Description
Account and Contact Reports	
Contact Mailing List	List of contact address details.
Key Accounts	Accounts that give you more sales revenue.

216

Accounts by Industry	Accounts from various industries.
Potential Reports	
Pipeline by Stage	Potentials by their stage.
Potentials Closing by this Month	Potentials that are closing during the current month.
Sales Person's Performance Report	Potentials gained by each sales person.
Lost Potentials	Potentials that are lost.
Potentials by Type	Potentials by their type.
Open Potentials	Potentials that are pending.
Pipeline by Probability	Pipeline of the potentials by their probability.
Sales By Lead Source	Sales from various lead sources.
This Month Sales	Sales that has happen during current month.
Today's Sales	Sales that has happen today.
Stage Vs Potential Type Report	Sales vs potentials report
Lead Reports	
Leads By Source	Leads from various sources.
Leads By Status	Leads and their status.
Today's Leads	Leads that are created today.
Leads by Ownership	Leads and the corresponding owners.
Converted Leads	Leads that are converted into Account / Potential / Contact.
Leads by Industry	Leads from various vertical industries.
Activity Reports	
Tasks and Events Report	List of all the tasks and events.
Today's Calls	List of current day's inbound and outbound calls.
Campaign Reports	
Campaigns Revenue Report	Revenue generated from the campaign.
Campaign Leads	Leads that are generated through the campaign.
Case & Solution Reports	
Popular Solutions	Number of comments for solutions.
Cases By Origin	Cases based upon their origin.
Cases By Status	Cases based upon their status.
Cases By Priority	Cases based upon their priorities.
Cases By Comments	Cases with the number of comments count.
Sales Forecast Reports	
Quarterly Forecast Summary	Quarterly forecasts that includes committed amounts, best-case amounts, and pipeline by quarter.
Forecast History Report	Life cycle of the forecast.
Product Reports	
Products by Category	Products based upon their category.
Products by Support Termination date	Products list whose support discontinued during the current month.
Products by Cases	Products and with the list of cases associated with the products.
Vendor Reports	
Amount by Vendors	Vendors based on the amount
Vendors Vs Purchases	Vendors based on the purchases made from the vendors.

Quote Reports	
Quotes by Accounts	Quotes based on accounts.
Quotes by Stage	Quotes based on their stages.
Sales Order Reports	
Sales Orders by Accounts	Sales orders based on accounts.
Sales Orders by Status	Sales orders based on their status.
Sales Orders by Owner	Sales orders based on their owners.
Purchase Order Reports	
Contacts Vs Purchases	Contacts based on purchases.
Purchase Orders by Status	Purchase orders based on their status.
Invoice Reports	
Invoices by Accounts	Invoices based on their accounts.
Invoices by Status	Invoices based on their status.
Sales Metrix Reports	
Lead Conversion across Industries	Average number of days taken for the Lead to be converted from various industries for the past 6 months
Lead Conversion across Owners	Average number of days taken by owners to convert the Lead for the past 6 months
Lead Conversion across Sources	Average number of days taken for the Lead to be converted from various sources in the past 6 months
Lead Conversion Count across Owners	Total number of Lead converted by various owners for the past 6 months
Overall Sales Duration across Lead Sources	Average number of days taken for the Lead to win as Potential from various Lead sources
Overall Sales Duration across Potential Type	Average number of days taken for the Lead to win as Potential of different type
Sales Cycle Duration across Lead Sources	Average number of days taken for the Potential from various lead sources to win
Sales Cycle Duration across Owners	Average number of days taken by the owner to win their Potential
Sales Cycle Duration across Potential Type	Average number of days taken for the Potential of different types to win
Territory Reports (only if you enable territory management feature)	
Overall Sales Cycle Duration among territories	Overall Sales Cycle Duration among territories - summary
Performance by Sales Persons across territories	Performance by Sales Persons across territories
Pipeline Potentials among Territories - Matrix	Potentials in pipeline based on territories matrix report.
Revenue By Territories - Last 6 Months	Revenue by territories for the past 6 months.
Revenue By Territories - Summary	Summary of Revenue by territories for dashboard.
Revenue Channels among Territories	Revenue Channels among Territories - Summary Report.
Sales Cycle Duration across Territories	Time take for the potentials to close acorss various territories
Star performers across territories	Sales persons who achieved their targets

Target Achieved among territories	Target achieved among territories for this FY. These do not include sub territories targets.

8.1.2 Dashboards

Dashboard is a pictorial representation of your custom reports, which gives a real-time snapshot of your organization's key metrics. Using dashboards, you can easily visualize the patterns and trends in sales, marketing, support, and inventory related data. For example, you can glance at the products that are selling fast over a period of time, compare the current quarter sales with previous quarter sales, or compare the actual sales to the projected sales.

In SalesGrow CRM, the dashboard comprises of different types of two-dimensional and three-dimensional charts (components). The various types of charts are bar, pie, line, table, or funnel. The unique feature in SalesGrow CRM is the Funnel chart, which can be used to visualize the various stages in sales pipeline.

Availability

Profile Permission Required: Access to the Dashboard Tab and Manage Reports & Dashboards permission.

Check Feature Availability and Limits

8.2 Recycle Bin

The Recyle Bin stores all the records and files that are deleted from the SalesGrow CRM account. The records in the recycle bin will be available for 60 days after which it will be permanently deleted from your CRM account.

Notes

- The records in the Recycle Bin will be available based on the Role hierarchy and your permission to view the records.

Restore Records

Records in the recycle bin are listed based on the the Role hierarchy and your permission to view the records. You can restore the records in a single click.

To restore records from Recycle Bin

1. Click **Setup** > **Data Administration** > **Recycle Bin**.
2. In the *Recycle Bin*, select the check boxes of the records that you want to restore.
3. Click **Restore**.

Delete Records from Recycle Bin

Records in the recycle bin will be available for 60 days after which it will be permanently deleted from your CRM account. Users with Administrator profile can select the records and delete them permanently from SalesGrow CRM.

To delete records from Recycle Bin

1. Click **Setup** > **Data Administration** > **Recycle Bin**.
2. In the *Recycle Bin*, select the check boxes of the records that you want to permanently delete.
3. Click **Delete**.

9. Automation

In business, there are numerous everyday activities and processes that need to be done and when automated will save time and effort. For example, a sales manager may be required to assign the leads to various sales reps based on certain criteria. Also, you may need to send pre-sales and post sales follow up emails to customers at scheduled intervals.

SalesGrow CRM gives you the option to automate workflow procedures and set up automatic replies, alerts, and notifications in advance. You can create workflow rules and associate workflow alerts, tasks and field updates with them. Additionally, you can set up case escalation rules and also assignment rules for leads, contacts and cases generated via web forms.

9.1 Workflow Management

Automate your sales, marketing and business processes and standardize working methods.

9.1.1 Workflow Rules

Workflow Rules in SalesGrow CRM, are a set of actions (alerts, tasks and field updates) that are executed when certain specified conditions are met. These rules automate the process of sending email alerts, assigning tasks and updating certain fields of a record when a rule is triggered. A workflow rule consists of the following elements:

- **Basic Details** - Specify details on the record type for which the rule applies, rule name, description, and option to activate the rule.
- **Rule Trigger**- Specify when the rule should be triggered for a record and based on what. There are two options:

- o **Execute based on a record's action** - Rules can be triggered when records are created, edited, created/edited, deleted or a specific fields are updated.
- o **Execute based on a date field's value** - For all the records matching the rule criteria, rule will be triggered either monthly or yearly based on the value of the date field that is selected.
- **Rule Criteria** - List out the criteria to filter out records that meet the criteria. Workflow rule is triggered to these records.
- **Instant Actions** - Add alerts, tasks, field updates, webhooks and custom functions that will be triggered immediately when the rule is executed.
- **Time Based Actions** - Add alerts, tasks, field updates, webhooks and custom functions that will be scheduled and triggered based on a specified time.

Availability

Profile Permission Required: Users with Manage Workflow permission in profile can access this feature.

Check Feature Availability and Limits

Create Workflow Rules

The steps to create a workflow rule are divided into 4 parts.

Part 1 - Specify the basic details of the rule

1. Click **Setup** > **Automation** > **Workflow** > **Rules**.
2. In the *Workflow Rules* page, click **Create Rule**.
3. In the *New Rule* page, do the following:
   - o Select the **Module** to which the rule applies from the drop-down list.
   - o Enter the **Rule Name**.
     - ▪ Click the **Lock/Unlock** icon to next to the rule name.
       Only *Administrators* can lock/unlock a workflow rule. This option is available so that others user are not able to edit or delete the rule. If required others can clone the workflow rule.
     - ▪ In the *Lock Rule* pop up, specify the reason to lock the rule and click **Yes, Lock**.

      o   Select the **Status** check box if you want the rule to be active.

1. Basic Information

Specify the basic details for the rule, such as Name and Description

        * Module: Leads

    * Rule Name: Follow up USA Leads

          Status: ☑ Active

    Description: Assign all the USA Leads and create follow up activities.

        [Next]   [Cancel]

      o   Enter the **Description** for the workflow rule.

4.   Click **Next**.

Part 2 - Select rule trigger option

There are two options based on which the rule will be triggered for a record that matched the rule criteria. One of these options need to be selected when you create a workflow rule and you cannot change it later by editing the rule. The two options from the *Execute based on* drop-down list are:

- **A Record Action** - Rules can be triggered when records are created, edited, created/edited, deleted or a specific fields are updated.
- **A Date Field's Value** -For all the records matching the rule criteria, rule will be triggered either monthly or yearly based on the value of the date field that is selected. This option is available only in the Enterprise Edition.

Execute Based on Record Action

When new leads are created in SalesGrow CRM you may want to automatically send an email or a series of emails at set intervals. You may also want to create tasks for these new leads. Also, sometimes when specific fields are updated, you may want to trigger a workflow. This execution option lets you specify an action based on which workflow rules will be triggered.

1.   Select one of the following:
      o   **Create**: Executes the rule when records are created.
      o   **Edit**: Executes the rule when existing record are modified.
      o   **Create or Edit**: Executes the rule when records are created or existing records are modified.

- o **Field Update**: Executes the rule when the values of the specified fields are modified in a record.
- o **Delete**: Executes the rule when certain records are deleted. Only Workflow Alerts and Webhooks and be associated for such a rule. The action includes:
    - Deleting a record from the Details Page.
    - Deleting from the List View (One by one or in bulk).
    - Using the Mass Delete feature.
    - Deleting from a record's Related List. For example, deleting a contact under an Account.

2. Rule Trigger

Specify when to execute the workflow.

Execute based on   A Record action ⇕

⦿ Create

Executes the Workflow Rule when a record is **created** in the Campaigns Module.

◯ Edit

Executes the Workflow Rule when an existing record is **edited** in the Campaigns Module.

◯ Create or Edit

Executes the Workflow Rule when a new record is **created** OR an existing record is **edited**.
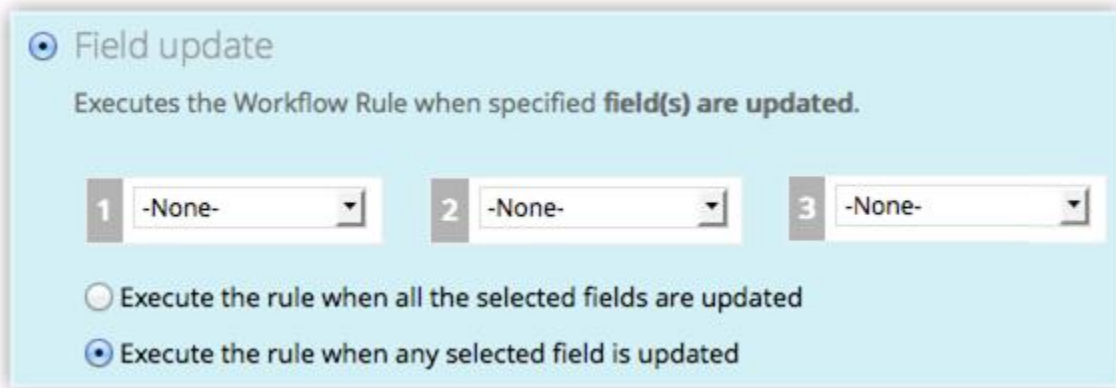
◯ Field update

Executes the Workflow Rule when specified **field(s) are updated**.

◯ Delete

Executes the Workflow Rule when a record is **deleted** in the Campaigns Module.

- When you select the **Field Update** option, do the following:

- o Choose the field name from the drop-down lists.
  - o Choose one of the following:
    - ▪ **Execute the rule when all the selected fields are updated.**
    - ▪ **Execute the rule when any selected field is updated**.
- Click **Next**.

Execute Based on Date Field's Value

You may want to get an email reminder a week before a deal's expected closing date, or may want to send an email to the customers reminding them of the monthly rentals or subscription renewals. In these cases, it is not necessary that the records should be created or edited for the rule to get triggered. It is plainly based on the value in the date fields. This execution option lets you pick a date field from a record and allows you to define the day for the rule to be triggered. Please note, with this option, a maximum of **3000 records** will be triggered every hour. If there are more than 3000 records, the remaining records will be executed in the next hour. Please note, this option is available only in the Enterprise Edition.

1. Choose a **Date** field from the drop-down list.
   All the date fields in the module for which the rule is being created will be listed.
2. Choose **On**, **Before** or **After** from the drop-down list to set the **Date of Execution**.
   The rule can be set to trigger a maximum of 90 days *Before* or *After* the Date field specified.
3. Specify the time of execution in hours and minutes.
   In case of DateTime fields, there is an option to trigger the rule based on the time in the field

value.

4. Select the **Execution cycle** as **Once**, **Every Month** or **Every Year**.
5. Click **Next**.

Note

- A locked rule cannot be edited by other users. If required, they can clone the rule to create another.
- The actions such as, alerts, field updates, tasks, etc. associated to a locked rule is also locked and cannot be edited or deleted by users.
- For a rule to be triggered using the *Field Update* option, both the rule criteria and the execution criteria must be true.
- If your SalesGrow CRM account is downgraded or the subscription expired, the workflow rules will be disabled. If you renew the subscription, you will need to manually enable the rules.
- When the *Delete* option is selected as the execution criteria, a workflow rule will not be triggered if records are deleted from the Recycle Bin.
- You can configure and associate only workflow alerts and webhooks to a workflow rule with the execution criteria as *Delete*.
- Workflow Rules will be triggered when records are modified using Mass Update, Macros and when ownership of records are changed. Rules are also triggered when tasks are created through Macro.

Part 3 - Set the rule criteria

1. In the *Rule Criteria* section, specify the rule criteria details.
2. Click **Add Criteria** to add multiple criteria.
3. Click **Next**.

Edit Criteria Patterns

Criteria Pattern Editor in the custom list view helps you to develop the advanced filters using simple logical operators like **and / or**.

Availability

Profile Permission Required: Users with the Manage Workflow permission in profile can access this feature.

Check Feature Availability and Limits

Note

- You can specify a maximum of **25 criteria** for a list view.

To edit criteria patterns

- Click **Setup** > **Automation** > **Workflow** > **Rules**.
- In the *Workflow Rules* page, click on a workflow rule.
- In the *Edit Rule* page, review your existing criteria and click the **Change Pattern** link.
- In *Pattern Editor* box, modify filters and click the **Save** link.
- Save the modified custom view.

Example:
You would like to trigger a workflow rule for all the potentials whose Type is New Business, Stage is Need Analysis or Qualification, and Amount is above $50000.

Type is New Business; Stage is Need Analysis or Qualification; and Amount > $50000.

You can create this criteria easily using the Criteria option given below:

1		Type	▲▼	is	▲▼	New Business	
2	AND ▲▼	Stage	▲▼	is	▲▼	Need Analysis	
3	OR ▲▼	Stage	▲▼	is	▲▼	Qualification	
4	AND ▲▼	Amount	▲▼	>	▲▼	50000	USD

The criteria pattern will be automatically set as:

Criteria Pattern =   (((1 and 2) or 3) and 4)   Change Pattern

Since the criteria pattern does not match the requirement, you can edit it as:

Criteria Pattern =   (1 and (2 or 3) and 4)   Save | Cancel

You can use the following characters in the Criteria Pattern Editor:

- Round brackets: ( )
- **and / or** operators
- Criteria Row Number

Important Notes

- When the *Change Pattern* box is being used to edit, you cannot add or delete a criteria row under the *Specify Criteria* section.
- The operator precedence will not be taken into account if you do not specify brackets. For example, if you specify the criteria as **1 or 2 and 3**, it will be considered as **((1 or 2) and 3)**
- You can change the **and** or **or** of the criteria rows and it will be updated in the Editor below.
- You can change the **and** or **or** condition in the pattern and it will be updated in the rows above.
- If you specify **1 and 2** and save it, on editing the view the pattern will be shown as **(1 and 2)**. For **(1 and 2) or 3** the pattern will be shown as **((1 and 2) or 3)**
- If you add more rows in the editor and delete one by one there will be additional brackets displayed in the pattern. For example if there are 4 rows added and you delete the 3rd row, the criteria pattern will be as **((((1 and 2))) or 3)**. If the first row is deleted then it will be shown as **((((1))) or 2)**. However, on saving the criteria, it will change as **(1 or 2)**.
- Make sure that you do not use the following as they are invalid: **()**, **(and)**, **(or)**.
- If the brackets do not match it will be treated as invalid.
- There will an error message, if the number of rows and the numbers given in the pattern do not match and also, if there are any numbers missed in the pattern.

- In case the final brackets are missing, there will be a difference in the Criteria Patterns Editor and its view mode.

Your Criteria Pattern in Editor	Your Criteria Pattern in View Mode
(1 and 2) or (3 and 4)	((1 and 2) or (3 and 4))
1 and 2 and 3 and 4	(1 and 2 and 3 and 4)
(1 or 2) and (3 or 4)	((1 or 2) and (3 or 4))

Part 4 - Associate instant and/or time based actions

1. In the *Actions* section, do the following:
   Note that you cannot save a rule without creating either an instant or a time based action.
   - Create **Instant Action** by associating alerts, tasks, field updates, webhooks or custom functions.
   - Create **Time Based Actions** and associate alerts, tasks, field updates, webhooks or custom functions.
   - A maximum of 5 time based actions can be created.
2. Click **Save**.

Associate Actions to Rules

Workflow rules are meaningful only if an alert, task, field update, webhook or custom function is associated to the rule. They are grouped under **Actions** that can either be **Instant Actions** or **Time Based Actions**. These actions once created, can be associated with many rules.

Note

- For each action, you can associate a maximum of 5 alerts, 5 tasks, and 3 field updates.
- You can associate up to 6 (1 Instant Action and 5 Time-Based Actions) custom functions per workflow rule. Similarly, you can associate up to 6 (1 Instant Action and 5 Time-Based Actions) webhooks per workflow rule.
- A maximum of 5 Time Based Actions (that includes alerts, tasks, field updates, webhooks and custom functions) can be created for a rule.
- If your SalesGrow CRM account is downgraded or the subscription expired, the workflow rules will be disabled. If you renew the subscription, you will need to manually enable the rules.

Create Instant Actions

Instant action includes alerts, tasks, field updates, webhooks and custom functions that are triggered immediately when the rule is executed. There are two options to associate these actions.

- **Create** alerts, tasks, field updates, webhooks or custom functions and associate them to the rule.
- **Select existing** alerts, tasks, field updates, webhooks or custom functions to associate to the rule.

To create an instant action

If you are creating a workflow rule, directly go to **step 4**

1. Click **Setup** > **Automation** > **Workflow > Rules**.
2. In the *Workflow Rules* page, click on the rule for which you want to create an action.
3. Click **Edit** to modify the rule settings.
4. Under *Instant Actions* section, do the following to associate alerts, tasks, field updates, webhooks or custom functions to the rule:

   o In the corresponding section, click (the Add icon) and specify the details to create a record and associate it to the rule.

   o In the corresponding section, click (the Associate icon) and select an existing record and associate it to the rule.

5. Click **Save**.

Note

- For a workflow rule, all the actions (alerts, tasks, field updates, webhooks and custom functions) will not be listed. If the rule is for Leads, only the actions created for Leads will be available for association.
- Only one set of instant action can be created with alerts, tasks, etc. associated to it.
- You can associate a maximum of 5 alerts, 5 tasks, 3 field updates, 1 custom function and 1 webhook to the instant action.
- If your SalesGrow CRM account is downgraded or the subscription expired, the workflow rules will be disabled. If you renew the subscription, you will need to manually enable the rules.

Create Time Based Actions

Time Based actions include alerts, tasks, field updates, webhooks and custom functions that are triggered on a specified time after the rule is executed. You can schedule the actions to be triggered based on the *Rule Trigger Date*, record *Created Time*, record *Modified Time* as well as other time or date fields in the module. You can see the list of scheduled actions for individual records under "Upcoming Actions".

There are two options to associate these actions.

- **Create** alerts, tasks, field updates, webhooks or custom functions and associate them to the rule.
- **Select existing** alerts, tasks, field updates, webhooks or custom functions to associate to the rule.

Availability

Profile Permission Required: Users with the Manage Workflow permission in profile can access this feature.

To create time based actions

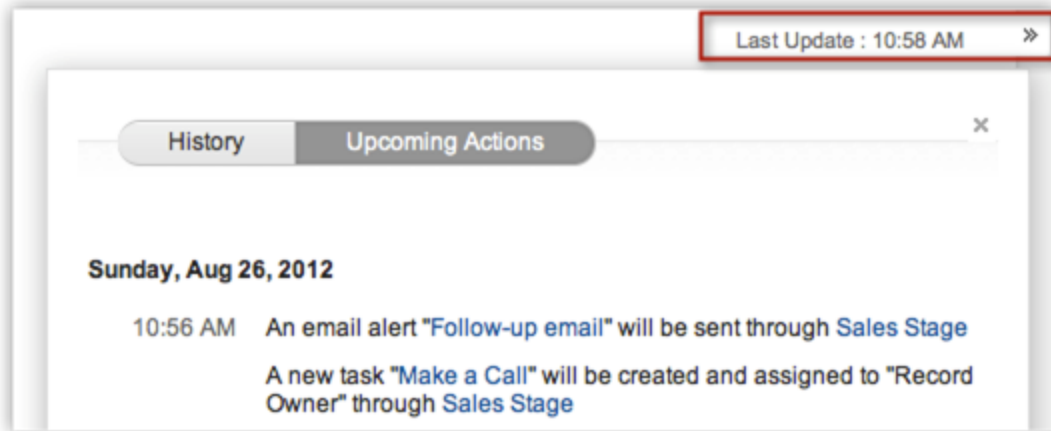If you are creating a workflow rule, directly go to **step 4**

1. Click **Setup** > **Automation** > **Workflow** > **Rules.**
2. In the *Workflow Rules* page, click on the rule for which you want to create an action.
3. Click **Edit** to modify the rule settings.
4. Under the *Actions* section, click **Add a Time Based Action**.
5. Enter a **Name** for the time based action.
6. Specify the **Execution Time**, i.e. when the associated actions should be triggered.

7. Click **Save**.

New Time Based Action

Name:	First Follow up

Execution Time: 3   Day(s) ↕   After ↕   Rule Trigger Date ↕

Save   Cancel

8. Under *Time Based Action* section, do the following to associate alerts, tasks, field updates, webhooks or custom functions to the rule:

- o In the corresponding section, click   **+**   (the Add icon), specify the details to create a record and associate it to the rule.

- o In the corresponding section, click   🗁   (the Associate icon), select an existing record and associate it to the rule.

9. Click **Save**.

Name: First Follow up
Execution Time: 3 Day(s) After **Rule Trigger Date**

✉ **Send Alerts (1)**

Name	Email Template
Support and Feedback	Support and Feedback Mail

📅 **Assign Tasks (1)**

Subject	Due Date	Priority	Status	Assigned To
Make a Call	WFRule Trigger Date plus 4 day(s)	High	Not Started	Marty Sinclair

▭ **Update Fields (0)**

Note

- For a workflow rule, all the actions (alerts, tasks, field updates, webhooks and custom functions) will not be listed. If the rule is for Leads, only the actions created for Leads will be available for association.
- You can create a maximum of 5 time based actions for a workflow rule.
- Each Time Based Action can have a maximum of 5 alerts, 5 tasks, 3 field updates, 5 custom functions and 5 webhooks..
- If the *Email Opt Out* option is enabled, emails will not be sent to the customers.

- For the Workflow Management feature, the Organization's Time Zone will be considered for calculating a day. In the absence of the time zone being defined, the Super Administrator's Time Zone will be considered.
- Time Based Actions are not minute based. There can be a delay of few minutes for the time based actions to be triggered.
- When email alerts reach the limit for the day, any remaining emails to be sent the same day will not be sent.
- If the Execution Time that is calculated is a time in the past, then the action will be triggered immediately. There can be a delay of few minutes for the time based actions to be triggered.
- The scheduled actions for a records will be listed under **Upcoming Actions** in the Records Details Page.

Instances when the Time Based actions will be rescheduled:

1. The Execution Criteria for the Rule is either **Edit** or **Create or Edit**. When the rule criteria is satisfied for a record, the instant actions are triggered and time based actions are scheduled for the record.
   If a user edits the record and the rule criteria is not fulfilled, then the time based actions scheduled earlier will be deleted. If the record is edited again and the criteria is satisfied, then the time based actions will be rescheduled.
2. For Time Based Actions, the *Execution Time* can also be based on the custom Date & Time field. When a rule criteria is satisfied for a record, the instant actions are triggered and time based actions are scheduled for the record.
   If a user edits the record to change the value of the date & time field, the time based actions will be rescheduled as per the new date & time value.

Instances when the Time Based actions will not be rescheduled or deleted:

1. The Execution Criteria for the Rule is either **Edit** or **Create or Edit**. When the rule criteria is satisfied for a record, the instant actions are triggered and time based actions are scheduled for the record.
   If a user edits the record but the rule criteria is not fulfilled, then the time based actions will not be scheduled again.
2. When a lead is converted, all the time based actions that are scheduled for the record will be deleted.
3. When the Enterprise Edition is downgraded to the Free Edition, all the time based actions that are scheduled for the record will be deleted.
4. When records are deleted, all the time based actions scheduled to the record will also be deleted. If the deleted records are restored, the time based actions will not be rescheduled.

Use List View & Summary View

There are two views for workflow rules that are created - the **List View** and the **Summary View**. The Summary View is available only for the workflow rules and not for the alerts, tasks and field updates. This view lists out the Criteria and Field Updates associated to the rules that will help you get a clear picture of all the rules and where they are used to avoid any confusion.

Note

- You need to select a module to check the summary view. This view is not available when you select the "All Modules" option.
- In the List View you can reorder the rules to change the sequence in which the rules need to be executed. The **Reorder** option will be available only after you select a module from the drop-down list.

To reorder the workflow rules

1. Click **Setup** > **Automation** > **Workflow** > **Rules**.
2. In the *Workflow Rules* page, select a module from the drop-down list.
   Make sure you have selected the List View and not the Summary View.
3. Click **Reorder Rules**.
4. Drag and drop the rules on the order that you want.

To use summary view

1. Click **Setup** > **Automation** > **Workflow** > **Rules**.
2. In the *Workflow Rules* page, select a module from the drop-down list.
3. Click *Summary View* icon.
   All the rules for the selected module will be listed along with the Criteria and the associated Field Updates. You can click the **Show More** link to see the other items associated to the rule.

Delete Workflow Rules

Workflow rules can be deactivated when not in use. You can also delete the unwanted workflow rules.

Note

- When you delete a workflow rule, all the time based actions scheduled for the records will also be deleted.

To delete workflow rules

1. Click **Setup** > **Automation** > **Workflow** > **Rules**.

2. In the *Workflow Rules* page, click the **Delete** icon 🗑 for the corresponding rule.

9.1.2 Workflow Alert

Workflow alert comprises of an email template, which is used to send email notification to all the specified recipients. This email notification is sent to the recipients when the associated workflow rule is triggered. You can associate maximum 5 workflow alerts to a rule.

Availability

Profile Permission Required: Users with the Manage Workflow permission in profile can access this feature.

Check Feature Availability and Limits

To create workflow alert

1. Click **Setup** > **Automation** > **Workflow** > **Alerts**
2. In the *Workflow Alerts* page, click **Configure Alert**.
3. In the *New Alert* page, under *Alert Details* section, do the following:
   o Enter a **Name** for the alert.
   o Choose a **Module** from the drop-down list.
   o Choose the **Email template** for the alert from the drop-down list.
   Only email templates created for the selected record type (module) will be listed in the drop-down field.
   o Click the **Create Templates** link to create a template.

* Name:	Welcome Mail
Module:	Leads
* Email Template:	Welcome Email	Create Templates

4. In the *New Alert* page, under *Recipient Details* section, choose the recipients:
   o **Persons Associated to the Record** - Depending on the type of record, you will have the option to select **Email** and **Secondary Email** field, **Record Owner**, **Record Creator** and the **Record Owner's Manager**.
   o **Groups**, **Roles**, **Roles and Subordinates**, and **Users.**
5. Specify the email address of the **Additional Recipients**. Use comma to separate more than one email address.
   You can add maximum 10 email addresses.
6. Click **Save**.
   An email based alert is created, which can be associated to the workflow rules.

9.1.3 Workflow Tasks

Workflow Tasks are assigned to the users when the associated workflow rules are triggered. A workflow task can be associated to a workflow rule, when you want to create a task and assign it to a user, upon triggering the rule.

Availability

Profile Permission Required: Users with Manage Workflow profile permission can access this feature.

Check Feature Availability and Limits

To create a workflow task

1. Click **Setup** > **Automation** > **Workflow** > **Tasks**.
2. In the *Workflow Tasks* page, click **Create Task**.
3. In the *New Task* page, do the following:
   o   Select the **Module** from the drop-down list.
   o   Enter a **Subject** for the task.
       Insert merge fields to create dynamic task subjects.

Module: Potentials

* Subject: Potentials | Closing Date | ${Potentials.Closing Date} | ⬇ Insert Field

Potential worth ${Potentials.Amount} is closed. Send Training email within 2 days from ${Potentials.Closing Date}

Hide Merge Fields

Length of the subject will be validated based on merge fields' values after rule execution. Max length is 100.

* Due Date: WFRule Trigger Date | plus | days

* Status: Not Started

* Priority: Normal

Assigned To: Fiona Smith
If you do not assign to a user, the task will be automatically assigned to the Record Owner.

- o Specify the **Due Date** to complete the task.
- o Select the **Status** of the task from the drop-down list.
- o Select the task **Priority** from the drop-down list.
- o Select the user from the **Assigned To** lookup list to assign the task.

Notify Assignee: ☐

Remind Assignee: ☑

1 Day before Due Date ⬍ at 16:00

Alert Mode:
◉ Alert through Email
◯ Alert through Pop-up

Description: Follow up with a call

- o Select the **Notify Assignee** check box to notify the task owner via email about the task.
- o Select the **Remind Assignee** check box to send reminder to the task owner.
  - ▪ **Alert through Email** - A reminder email will be sent to the task owner at the specified time.

- **Alert through Pop-up** - A pop-up reminder will be initiated to the task owner at the specified time.
- o   Enter the task **Description**.
4. Click **Save**.
A new workflow task is created, which can be associated to workflow rules.

Note

- Workflow tasks cannot be created for records that does not support tasks in SalesGrow CRM, such as Solution, Forecasts etc.
- Workflow tasks cannot be associated to a workflow rule if the Execution Criteria selected for a rule is 'Delete'.
- If the **Assigned To** field is not specified, the system will automatically assign the Task to the record's owner.
- If you select a workflow task while importing records (such as leads, accounts, contacts), **Notify Assignee** option (though selected for the particular workflow task) will not be applicable.
- If the owner of the task is inactive or unconfirmed, then the task will be automatically assigned to the owner of the record to which the task is added. In case the record's owner is also an inactive or unconfirmed user, then the task will be assigned to the Super Administrator.

9.1.4 Workflow Field Updates

The Field Update option helps you to automatically update certain field values in the records, when the associated workflow rule is triggered.

Availability

Profile Permission Required : Users with the Administrator profile can access this feature.

Check Feature Availability and Limits

To create field updates

1. Click **Setup** > **Automation** > **Workflow** > **Field Updates**.
2. In the *Workflow Field Updates* page, click **Configure Field Update**.
3. In the *New Workflow Field Update* page, do the following:
   - o   Enter a **Name** for the field update.
   - o   Select the **Module** from the drop-down list.
     You can also update the field values of the related parent records associated to the record selected for workflow rule. **For example: While creating workflow rules for**

Contacts, you will be able to update the fields of the parent Account records too.

o   Select the field from the **Update** drop-down list that needs to be updated.
o   Specify the value for the field that you want updated.
o   Click **Save**.

Note

- Workflow Field Updates cannot be associated to a workflow rule if the Execution Criteria selected for a rule is 'Delete'.
- You can associate a maximum of 3 field updates to each action (Instant and Time Based Actions).
- You can update the Record Owner field too using this feature.
- You can also use this feature to update a Text field and DateTime field with no value so that the field is left blank.
- Using workflow field updates, the owner of the record can be changed. If the user to be assigned is inactive or unconfirmed, the workflow field update will not be executed.
- From within a workflow rule, you can also create Workflow Field Updates to update parent record's fields.

Record Type	Parent Records That You Can Update
Contacts	Accounts, Vendors
Potentials	Accounts, Campaigns, Contacts
Cases	Products, Accounts, Potentials, Contacts
Solutions	Products
Products	Vendors
Quotes	Contacts, Accounts, Potentials
Sales Order	Contacts, Accounts, Potentials, Quotes
Purchase Orders	Contacts, Vendors
Invoices	Accounts, Sales Orders, Contacts

Scenario for Field Update

Scenario:

While creating leads you want to update the following field values based on some criteria.
Lead Status as **Contact Immediately**
The criteria is, if the lead status is Not Contacted and the email address of the lead does not contain yahoo, gmail, or hotmail, then the following fields should be updated:

Procedure:

First, you need to create Workflow Field Updates as given below:

1. Click **Setup** > **Automation** > **Workflow** > **Field Update**.
2. In the *Workflow Field Update* page, click **Configure Field Update***.*

3. In the *New Field Update page,* enter a **Name** for the update*.*
4. Select the **Module** for which the field update applies.
5. Specify the Update as **Lead Status = Contact Immediately**.
6. Click **Save**.
   Once the field updates are created, you need to create a workflow rule with the following:
   - **Module** - Leads
   - **Execute On** - Create
   - **Rule Criteria** - **Lead Status is Not Contacted** and **Email doesn't contain yahoo, gmail, hotmail**.
   - **Instant Action** - Workflow Field Update (select the two field updates that you created)

Now, when you create a lead with an email address other than yahoo, gmail, hotmail, the *Lead Type* and *Lead Status* field values automatically get updated for the record.

Lead Information			
Lead Owner:	Tricia Boyle Change	Company:	Mediteran
Title:	Mr.	Lead Name:	Karl Dorman
Phone:	800-555-0114	Email:	d.karl@samplecompany.com
Lead Source:	Trade Show	Lead Status:	Contact Immediately
Email Opt Out:		Industry:	IT Services

9.1.5 Workflow Scenarios

Following are some of the examples of workflow rules.

Workflow Rules with Instant Actions

Scenario - Assign leads to selected users when it is a high value deal.

Record Type - Leads

Execute On	Create or Edit
Rule Criteria	Amount is 10,00,000
Instant Actions	**A Task and Field Update** Create a field update that updates the Lead Owner field value to a particular user. Also, create a task for the new record owner.
Time Based Actions	-

Scenario - Notify management when a big deal is lost.

Record Type - Potentials

Execute On	Edit
Rule Criteria	Stage is Closed Lost
Instant Actions	**An Alert** Create an email template for potentials that includes the potential details and the reason for losing the deal.
Time Based Actions	-

Scenario - Assign demo requests that are generated from web forms to Sales Reps. You can assign the demos to the reps based on the type of product or the number of licenses needed.

Record Type - Leads

Execute On	Create
Rule Criteria	Region is EST
Instant Actions	**A Field Update** Create a field update that updates the Lead Owner field value to a particular user. Also, create a task for new lead owner.
Time Based Actions	-

Scenario - Set the Response Time when a case is created based on the type of customer.

Record Type - Cases

Execute On	Create
Rule Criteria	Customer Type is Platinum
Instant Actions	**A Field Update** Create a field update that sets the Response Time to a particular value.
Time Based Actions	-

Scenario - Assign a task to contact and qualify the lead within a specified due date.

Record Type - Leads

Execute On	Create
Rule Criteria	Lead Status is Not Contacted
Instant Actions	**A Task** Create a task that defines the due date by which the lead should be contacted and qualified. You can calculate the due date based on any date field in the module.
Time Based Actions	-

Scenario - Notify the record owner and management when a lead status changes to 'Qualify'.

Record Type - Leads

Execute On	Create or Edit
Rule Criteria	Lead Status is Qualify
Instant Actions	**A Task and Alert** Create a task to convert the lead. Also, create an email template to notify the record owner and management about the lead status.
Time Based Actions	-

Workflow Rules with Time Bases Actions

Scenario - Notify users if the potential's closing date is tomorrow and if it is a high value opportunity.

Record Type - Potentials

Execute On	Create or Edit
Rule Criteria	Amount >= 10,00,000
Instant Actions	-
Time Based Actions	**Execution Time** - 5 Day(s) Before Closing Date **An Alert and Task** Create an email alert to notify the management and the potential owner about the closing date. Also, create a task for the record owner to follow-up with the potential.

Scenario - Assign task to the invoice owner if the invoice payment due date is nearing

Record Type - Invoices

Execute On	Create
Rule Criteria	-
Instant Actions	-
Time Based Actions	**Execution Time** - 3 Day(s) Before Due Date **An Alert and Task** Create an email that needs to be sent to the invoice record owner as a reminder to collect payments within the due date. Also, create a task to collect the payments.

Scenario - Send an email to users who are evaluating your product, asking them for their feedback.

Record Type - Leads

Execute On	Create or Edit
Rule Criteria	Lead Status is Product Evaluation
Instant Actions	**An Alert** Create an email that provides information on your product and lists out the help resources.

Time Based Actions	• **Execution Time -** 7 Day(s) After Evaluation Start Date
	  An Alert and Task
	  Create an email template to be sent to the customers, highlighting some important features in your product.
	
	• **Execution Time -** 14 Day(s) After Evaluation Start Date
	  An Alert and Task
	  Create an email template to be sent to the customers, asking them their feedback

	on your product and informing them of the evaluation period coming to an end. Also, you can assign a task for the record owner to personally call and see if the lead is interested to purchase.

9.1.6 Webhooks

Webhooks facilitates communication with third-party applications by sending instant web notifications every time an event occurs in SalesGrow CRM. With Webhooks, you can configure HTTP URLs and associate them in workflow rules to automate the entire notification process. For general information about Webhooks.

Scenarios

- After closing a potential in SalesGrow CRM, you can push the customer information to Accounting software and automatically generate an Invoice for the Customer.
- You can generate an estimate in your Accounting software as soon as the opportunity stage is changed from Prospecting to Price Quote.

Availability

Profile Permission Required: Users with the Manage Workflow permissions in can access this feature.

Check Feature Availability and Limits

List of Fields in Webhook

Field Name	Description	Data Type	Maximum Limit
Name	Specify name of the webhook.	Text	Alphanumeric(50)
Description	Add a description for the webhook.	Text	200 characters
URL to Notify	Specify the REST API URL of the third-party application.	URL	200 characters
Method	Select type of API method - POST or GET. By default, system selects POST method.	Radio Button	-
Module	Choose one of the SalesGrow CRM modules. Supported Modules: • CRM primary module, such as leads, accounts, contacts, potentials, etc.	Picklist	-

244

	• Events and Tasks **Note:** You can not set up webhooks for Call Logs and Notes modules.		
Append Entity Parameters	Specify the Parameter Name and corresponding Parameter Value. This is the request parameters sent while triggering the webhook notification to third-party application. Supported Modules: • CRM primary modules • User • Organization	String	3000 characters
Append Custom Parameters	Specify the CRM Parameter Name and corresponding Value for the webhook. This is also the request parameters sent while triggering the webhook. The name and the value are as configured. This key/value pair is mainly used to send the Auth tokens, security tokens, etc.	String	-
Preview URL	Preview the complete webhook URL to be notified to the third-party application.	Text	Read-only

Set Up Webhooks

Setting up Webhooks includes the following three steps:

- Create a webhook.
- Associate webhook to a workflow rule.
- Test webhook integration.

To create a webhook

1. Click **Setup > Automation > Workflow > Webhooks**.
2. In the *Webhooks* page, click the **Configure Webhook**.
3. In the *Configure Webhook* page, specify all necessary parameters.
4. Click **Save.**

New Webhook

Name*

Sales Commission Webhook

Edit Description

URL to Notify* (Example: https://yourdomain.com/getNotified.do)

https://creator.zoho.com/api/xml/write

①

Method: ⦿ POST ◯ GET

Module*
Potentials

URL Parameters

▼ Append Entity Parameters

Parameters in Standard Format (Name = Value)

②

Parameter Name

Parameter Value

= | Select Field | ▼ | ✚

⌐ | Potentials | ▼

Parameters in the User Defined Format (XML, JSON, etc.)

Parameter Name

XMLString

Value Description (XML, JSON, etc.)

③

```
<ZohoCreator>
  <applicationlist>
    <application name='sales-commissions'>
      <formlist>
        <form name='Commissions'>
          <add>
            <field name='Name'>
              <value>${Potentials.Potential Name}
</value>
            </field>
```

(Maximum Characters: 3000)

| Potentials | ▼ |

| Select Field | ▼ |

| | |

Insert

▼ Append Custom Parameters (Like API Key, Auth Token, etc.)

④

Parameter Name

Parameter Value

apikey	=		✖
ticket	=		✖
zc_ownername	=		✚ ✖

Preview URL (Refresh Now)

⑤

https://creator.zoho.com/api/xml/write?XMLString=
<XMLSTRING>&apikey=   &ticket=
                    &zc_ownername=

Save | or Cancel

To associate webhook to a workflow rule

1. Click **Setup > Automation > Workflow Rules.**
2. In the *Workflow Rules* page, click the **Create a Workflow Rule.**
3. In the *Workflow Rule* page, specify workflow rule parameters.
4. Under *Workflow Actions*, select the webhooks to be triggered.
5. Click **Save**.
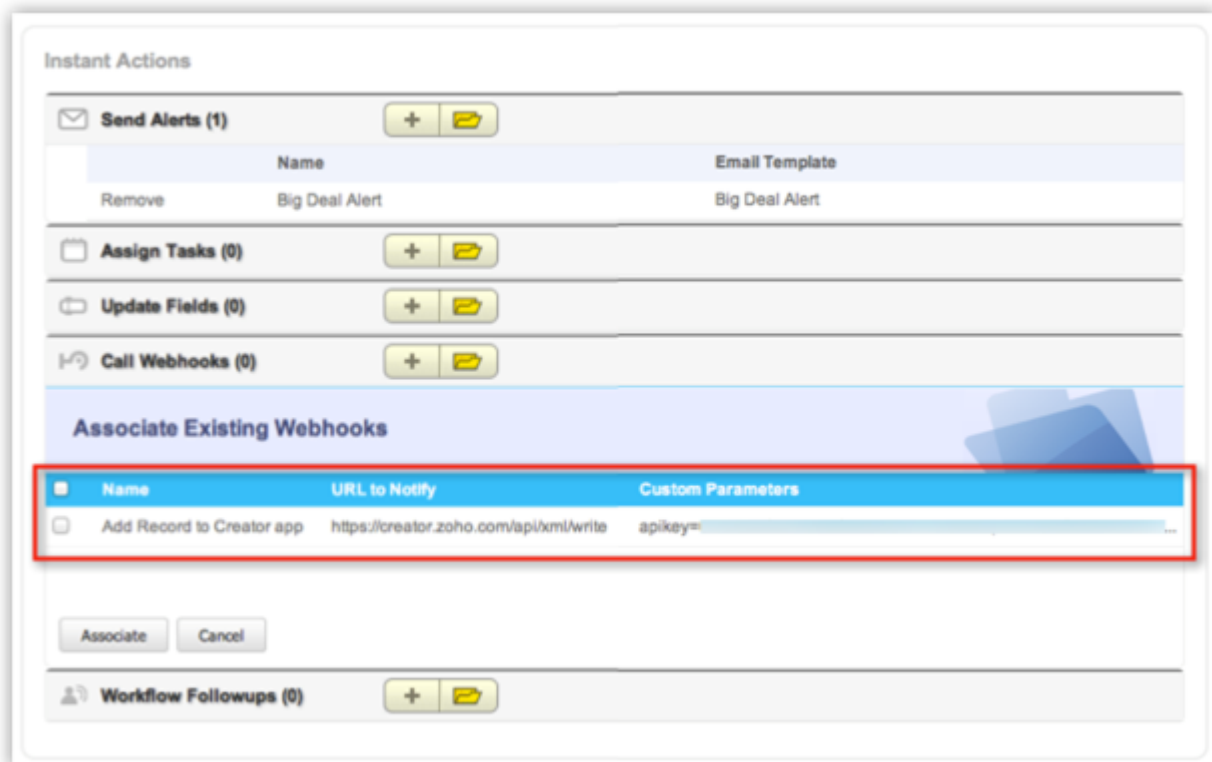
To test the webhook integration

1. Add test data in CRM according to your workflow rule criteria.
2. In your application check for the data received from SalesGrow CRM via webhook notification.
3. If there is an error or data mismatch, modify your webhook settings in SalesGrow CRM.
4. Continue this test until you obtain the required data from SalesGrow CRM to your Application.

Important Notes

- You can associate up to 6 (1 Instant Action and 5 Time-Based Actions) webhooks per workflow rule.
- You can transfer data for a maximum of 10 CRM fields from SalesGrow CRM to third-party applications using webhook.
- You cannot retrieve data from other Apps to SalesGrow CRM using webhooks.
- You must update the API ticket regularly according to limits in third-party applications.

- You will not receive any email notification, if the Webhook integration stopped functioning due to any issue in a third-party API.
- If there is any failure in the process, Webhook will send a notification first, SalesGrow CRM system will send a second notification after 15 min. Thereafter, the system will not send any Webhook notifications for that particular workflow trigger.
- If you exceed the maximum count per day, the system will not send remaining Webhook notifications to third-party applications and will notify the failure to Administrator.
- In the **URL to Notify** field, if you want to specify a port number, please note that only **80** or **443** port numbers are supported.
- SalesGrow CRM will the send the data in following standard format for **Date** and **Date Time** fields to third-party applications:
  - **Date:** yyyy-MM-dd
  - **Date Time:** yyyy-MM-dd hh:mm

9.2 Website Integration

Use web forms, auto response rules and unsubscribe forms to gather data online and build a multi-channel communication to improve business.

9.2.1 Web Forms

Web forms simplify the process of capturing visitors or users information from your website into your CRM system. They are designed to automate the importing of data from websites into SalesGrow CRM. Non-technical users find it easy to design and publish their own web forms.

Web forms are supported for **Leads**, **Contacts**, **Cases** and any other **Custom Modules** that you have in your account. Before setting up the web form, complete the following check-list:

- Create a default Email template to send automated replies to website visitors upon submission of their details.
- Create an Assignment rule if you wish to assign the incoming records to specific users or based on round robin method. By default, all incoming records are assigned to the Administrator.
- Configure the Web form further, to suit your requirements.
- Customize the fields to be added in the web form.
- Test the entire workflow of Web form, before publishing in the Website.

Availability

Profile Permission Required: Users with the Web-to-[Module] permission can access this feature.

Web forms can be used to:

- Capture data (visitors' information)
- Communicate with website visitors
- Conduct surveys
- Respond to user questions
- Generate online sales
- Receive online feedback

Creating a web form involves three steps

- **Building the form** - Drag and drop fields to build a form and format it easily with the WYSIWYG editor.
- **Specifying the form details** - Add details such as form name, landing page URL (where the visitor needs to be redirected after the form is submitted) record assignment rule, notification details, etc.
- **Generating the code for the form** - Embed the form using various code formats. Codes for some third-part sites (WordPress, Google Sites, Facebook, and Joomla) are readily available.

You can build web forms to generate records for the **Leads**, **Contacts**, **Cases** and any other **Custom modules**. While building a web form, the following elements are available in the form:

Option	Description
Add Fields	Drag and drop the fields that are required in the form. By default, some of the fields are already added when you build a new form.
Set fields' font and form layout	Use the WYSIWYG editor to change the font style and size, background color, alignment of the fields, etc. in the form.
Insert Captcha	Captcha is used for security in feedback forms, website registration, comments from visitors, etc. Add captcha for the SalesGrow CRM system to prevent unauthorized automated spamming programs from filling the web form. This option is available only in the Paid Editions.
Upload Files in the form	With this option capture files through your web-to-lead/contact/case forms, such as screenshots of an issue, quote requests, photo of individuals, etc. The size of the file should be within 20 MB. If the file size exceeds the limit, the form will not be submitted and the record will not be added in SalesGrow CRM. This option is available only in the Paid Editions.
Mark fields as mandatory	Collect important information such as name, email address, mobile number, etc. from the visitors who fill up the web form by marking fields as mandatory.
Mark fields as hidden	Add a hidden field and its value in the form. These hidden values are submitted along with the web form but are hidden to the visitors who fill the form.
Add help link for a field	A field you provide may require data to be filled in a specific format. For example, the date format may need to be specified in DD-MM-YYYY. For such requirements, you

	can use the option to add a tip or hint to help the visitor who fills the form.
Change button name	The name of the call to action button can be Save, Submit, or another other name. You can easily change the name as per your requirements.
Specify location URL of the form	The Location URL is the web page URL where you plan to host the web form. Specifying the URL helps prevent spam and allows only forms submitted through the particular domain to be captured as valid information.
Specify landing page URL	This is the URL of the web page to which the visitor needs to be redirected once the web form is submitted.
Select record assignment rule	Records generated through the web forms can be automatically assigned to the users in CRM with the help of Assignment Rules.
Specify notification options	Set notifications that needs to be sent to the record owners and also the visitors who submit the forms. Email templates or autoresponse rules can be used to send notification emails.
Embed form code	Embed the web form's code in your web page. The code is available in three different formats - HTML source code, Embed code and iFrame code.

Generating Web Forms

To generate web forms for Leads, Contacts, and Cases

1. Click **Setup** > **Website Integration** > **Web Forms**.
2. In the *Web Forms* page, choose the **Module** from the drop-down list.
   The existing web forms for the selected module will be listed.
3. Click **Create Web Form**.
4. In the web form builder, do the following:
   - **Build a form**
     - Drag and drop the fields that you need in the web form.
     - Insert captcha.
     - Add the option to upload files.
     - Mark fields as mandatory.
     - Make fields hidden in the form.
     - Provide hint or help links for fields.
     - Set font and layout of the form.
     - Change button names.
   - **Specify form details and other options**
     - Add form details such as, form name, landing page URL, form location URL.
     - Set record assignment rule.
     - Set notification options
   - **Copy web form code and embed options**
     - Get code to embed in your site and other third-party sites.
       The code is available in three different formats - HTML source code, Embed code and iFrame code.

Step 1: Build a Form

Drag & drop fields in the WYSIWYG editor, which also provides various other options to build a form.

Add Fields

Drag & drop the fields you need in the form and change the font style and size, background color, alignment of the fields, etc.

To add fields and set font and layout of the form

1. Under the *Fields List* tab, click on a field and drag & drop it in the form builder.
2. Make changes to the font, background color, field label alignment and form width.

Note

- By default, some of the fields are already added in the form.
    - For Leads and Contacts - **Last Name**, **Email** and **Phone** fields.
    - For Cases - **Status**, **Subject** and **Description** fields.
- You cannot remove the following fields from the form, as they are mandatory for a record.
    - For Leads and Contacts - **Last Name** field.
    - For Cases - **Subject** field.
- To have custom fields, you need to first create them in the particular module.
- When you add the **Account Name field in the web form for Contacts** and contact details are submitted, an account will automatically be created in SalesGrow CRM. If an account with the same name already exists in your CRM account, an account will not be created when the form details are submitted.
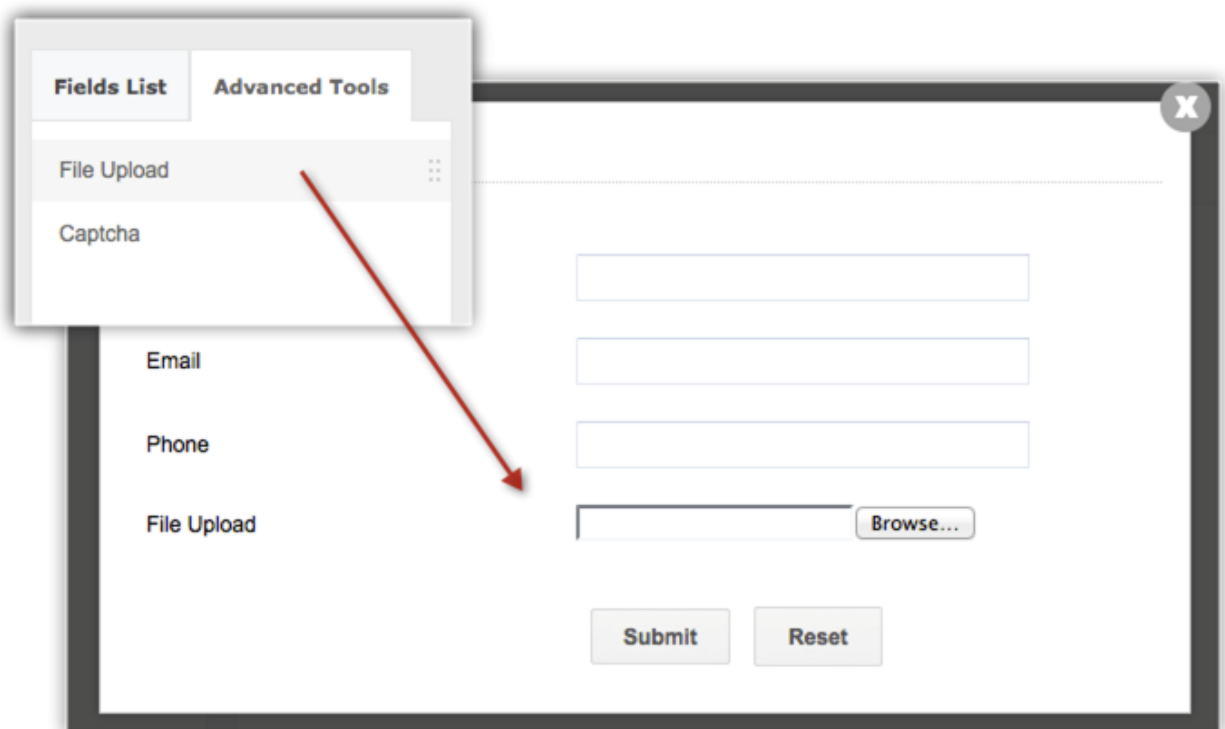
- An Account will be created, even if certain mandatory field details are not provided. Later, when the account is edited, you need to provide the other mandatory details before saving the record.

Upload Files

Capture files through your web-to-lead/contact/case forms, such as screenshots of an issue, quote requests, photo of individuals, etc. The size of the file should be within 20 MB. If the file size exceeds the limit, the form will not be submitted and the record will not be added in SalesGrow CRM. This option is available only in the Paid Editions.

To add the option to upload files

1. Click the **Advanced Tools** tab.
2. Drag & drop the **File Upload** field.
   Note that the visitor can upload a file not more than 20 MB. You can use the help link option in the *Field Settings* to provide this hint.
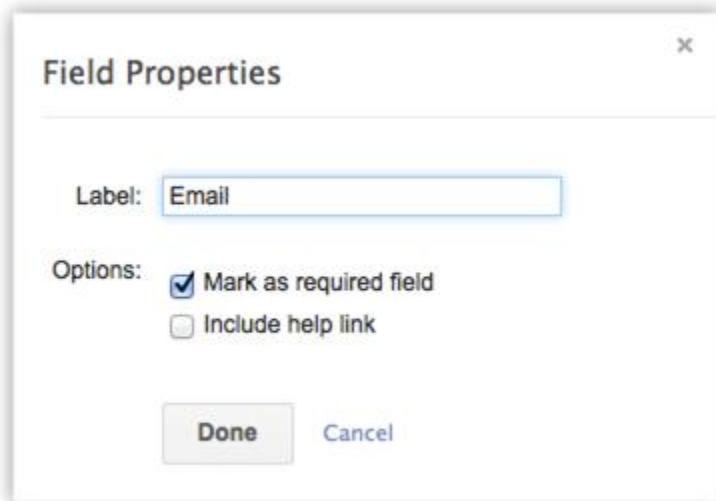

Mark Fields as Mandatory

Collect important information such as name, email address, mobile number, etc. from the visitors who fill up the web form by marking fields as mandatory.

To mark fields as mandatory

1. Move your mouse pointer to the field that you want to mark as mandatory.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, select the **Mark as required field** checkbox.
4. Click **Done**.

Mark Fields as Hidden

Add a hidden field and its value in the form. These hidden values are submitted along with the web form but are hidden to the visitors who fill the form. For example, if you have hosted the same form in various web pages, the hidden field will help you identify which record is generated form a web form hosted in a specific web page.

To make fields hidden in the form

1. Move your mouse pointer to the field that you want to hide in the form.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, select the **Mark as hidden field** checkbox.
4. Specify the value for the field and click **Done**.

253

Provide Help Link

A field you provide may require data to be filled in a specific format. For example, the date format may need to be specified in DD-MM-YYYY. For such requirements, you can use the option to add a tip or hint to help the visitor who fills the form.

To provide hint or help links for fields

1. Move your mouse pointer to the field for which you want to provide hint or help link.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, select the **Include help link** checkbox.
4. Choose one of the following:
   o **Link & Text** - Specify a text for the link and provide the link URL.
   o **Link Only** - Specify the help/hint text. For example, the date field can have - MM-DD-YYYY
5. Click **Done**.

Change Button Name

By default, there are two call to action buttons - **Submit** and **Reset**. You can rename these buttons as per your requirements.

To change button names

1. Move your mouse pointer to the field that you want to rename in the form.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, modify the field name.
   The name of the field will be changed only in the form.
4. Click **Done**

Remove Field from the Form

Easily remove unwanted fields from the web form and add them whenever required.

To remove a field from the form

1. Move your mouse pointer to the field that you want to remove from the form.
2. Click on the **Delete** icon.

Preview the Web Form

Take a look at the web form before publishing it in your web site.

To preview the form

1. In the form builder, click on the **Preview** link.
   A preview of the form will be available.

Step 2: Specify Form Details

1. Enter a **Form Name** (Example: Feedback, Contact Us, etc.).
2. Specify a **Landing page URL**. The visitor who submits the form will be redirected to the URL specified here. It should start with **"http:// or https://"**.
   The length of Return URL should not exceed 255 characters. (Example: **https://www.zillum.com/thank-you.html**)
3. Specify a **Form Location URL**. This should be the webpage where the web form will be hosted. It should start with **"http:// or https://"**. (Example: **https://www.zillum.com/contact-us.html**)
   If you plan to host the web form in multiple websites or you are not sure where the web form will be hosted, enter * in this field. This prevents spam and allows only forms submitted through

the particular domain to be captured as valid information.

4. Choose one of the following options to **Assign Owner** to the records that are submitted via web form.
   - o **Choose a User** - Select from the drop-down list. All the records generated through the form will be assigned to the selected user.
   - o **Create or Choose [Module] Assignment rule** to assign ownership - Select an existing assignment rule or create a new one. Based on the rule, records will be assigned to the users. With assignment rules you can implement the **Round Robin** method to assign records to the users.
5. Enable **Notify [Record] Owner**, if required and select an email template that will be sent to the record owner.
6. Enable **Acknowledge Visitor** if you want to send an email to the person who submitted the web form.
   - o **Using Autoresponse Rule** - Use one of the existing auto response rules. Based on the details gathered using the web form, autoresponse rules can be triggered to send specific emails.
   When details gathered through the web form does not satisfy the Auto Response Rule criteria, then the email template selected in the second option will be sent as an acknowledgment email.
7. Click **Save**.

Note

- The **Request Approval** option will help you validate the generated records manually, and then add them to the corresponding module in SalesGrow CRM. If this option is not selected, all the records generated through the web form are added directly to the corresponding modules.
- If the domain name in the Location URL does not match with the URL where the web form is hosted, then the information will not be captured. Alternatively, you can enter [*] in the landing URL field to capture from other / multiple domains.

Step 3: Use Web Form Code to Embed

The code for the web form is available in 3 formats: **Source Code**, **code to Embed**, **iFrame code**. The code is also readily available for some third-party sites - WordPress, Facebook, Google Sites and Joomla. Please note that the Script and iFrame code is available only in the Paid Editions.

1. Click on **SalesGrow Sites**, **WordPress**, **Facebook**, **Google Sites**, or **Joomla** to get the respective code.
2. Copy the code and paste it in the website where you want the web form.
3. Click **Done**.

Note

- In order to avoid spam, the generated Web Form (HTML file) must be published in an active web server (Apache, Microsoft, IIS, etc.).
- The web form will not work if you submit the form values from your desktop.
- When the HTML code is generated for the web form, certain entities are hidden by default. If you remove those hidden entities, the web form will not work. Here is the code snippet that should not be removed from your web form code:

  <input type="hidden" name="xnQsjsdp" value="" /> <input type="hidden" name="xmIwtLD" value="" /> <input type="hidden" name="actionType" value="" /

9.2.2 Auto Response Rules

The Auto Response rule feature enables you to send automated emails when **leads, contacts**, **cases** or **records for the custom modules** are generated through web forms. When a lead is generated through web forms, you may want to send appropriate emails to the leads with different types of requests. In such cases, you can create an auto response rule with specific rule criteria. When the condition is satisfied, the corresponding email is sent. You can create numerous auto response rules but only one auto response rule can be active at a time.

Note

- When the details gathered through the web form does not satisfy the Auto Response Rule criteria, then the email template (acknowledgment email) selected while creating the web form will be sent.

Availability

Profile Permission Required: Users with the permission to create web forms can access this feature.

Check Feature Availability and Limits

Create Auto Response Rule

To create auto response rules for web forms

1. Click **Setup** > **Website Integration** > **Auto Response Rules**.
2. In the *Auto Response Rules* page, select the module from the drop-down list.
3. Click **Create Rule**.
   You will be able to create the auto response rule for the selected module.
4. In the *Create Auto Response Rules for Web to [Module]* page, do the following:
   o Enter the **Rule Name**.

* Rule Name: Thank You Mail

Enable this as the active Auto Response rule for Web to Lead : ☑

Save   Cancel

   o Select the check box to activate the rule.
5. Click **Save**.

Note

- Once the rule is created, you need to define the criteria (i.e. create rule entries) based on which the email template will be sent to the visitor who submits the web form.

Create Auto Response Rule Entry

To create auto response rule entry

1. Click **Setup** > **Website Integration** > **Auto Response Rules**.
2. In the *Auto Response Rules* page, click on the rule for which you want to create the rule entry.

3. In the *Auto Response Rules for Web to [Module]* page, click **Create Rule Entry**.

4. In the *Rule Entry* page, do the following:
   o Specify the **Rule Criteria**.
   o Choose an **Email Template** from the drop down list.
     If you do not have email templates created for the module, you can click on the **Create an Email Template** link.
5. Click **Save**.

Note

- When the details gathered through the web form does not satisfy the Auto Response Rule criteria, then the email template selected while creating the web form will be sent.

9.2.3 Unsubscribe Form

This feature helps you to generate the HTML code for the Unsubscribe Form. You can use the Form to provide an Unsubscribe option for the email recipients. The process to set up the form consists of three parts.

Availability

Profile Permission Required: Users with the Unsubscribe Form permission in profile can access this feature.

Part 1 - To generate an unsubscribe Form

1. Click **Setup** > **Website Integration** > **Unsubscription Form**.
2. In the *Unsubscription Form* page, do the following:
   - o Enter your website address in the Return URL field.
   - o Click **Generate HTML**.
3. Copy and paste the generated HTML code into HTML editor and save it as an HTML file.
4. Click **Finish**.

Part 2 - To publish the unsubscribe Form

When you want to publish the unsubscribe form in a web page and provide a link to the web page from an email.

1. Create a web page in your website and paste the generated HTML code in the page.
2. Get the URL for the web page that you created in your website.

Part 3 - To add unsubscribe link in the email template

1. Click **Setup** > **Templates** > **Email Template**.
2. In the *Email Templates* page, click the **Edit** link corresponding to the email template you want to provide the Unsubscribe option.
3. Click **Edit**.
4. In the **Footer** section, type your desired content. *Example*: "Click here to unsubscribe".
5. Select the **View HTML source** check box and provide a link to the page where the unsubscribe form is published. Example:
   Click here to unsubscribe.
6. Click **Save**.

Part 4 - To use unsubscribe option

1. Click the **Unsubscribe** link in an email message.
2. Enter the Email address and click **Unsubscribe**.
3. The **Email opt out** option for the **Lead** and/or **Contact** will be automatically selected.
   emails will not be sent to the Leads or Contacts, if the Email Opt Out check box is selected.

Note

- If the user enters a Secondary Email Address, then also the email opt out option will also be selected.
- The HTML code cannot be embedded directly in your email template.
- You need to save the generated code as an HTML file and use the link in the email template.

10. Customer Support

SalesGrow CRM provides the Customer Support & Service management (Help Desk) features, such as **Cases** (Trouble tickets), **Solutions** (Knowledge base), **Case Routing & Escalation** through Workflow rules, and easy to deploy **Web-to-Case** forms for capturing customer-specific cases through Websites. In addition, you can also **synchronize customer-specific email messages** as Cases from Microsoft Outlook mail client to the Cases module in SalesGrow CRM.

The Cases and Solutions functionality can be used to streamline organization-wide Customer Support processes by integrating Sales & Customer Support in a single system. Integration between Sales and Post-sales support management helps organizations in resolving the customer reported cases in the least possible time, enhancing customer satisfaction and allowing for more cross-selling and up-selling opportunities in future.

10.1 Cases

Cases refer to the feedback received from the customers on various issues pertaining to the use of products or services.

10.1.1 Create Cases

In SalesGrow CRM, you can create cases by:

- **Entering data in the case details form:** You can manually fill in the Case details gathered from various external sources.
- **Importing cases from external source:** You can gather data through various sources and import the CSV and XLS files into SalesGrow CRM.
- **Capturing cases from website:** You can create web forms and allow website visitors to submit their case details or questions directly through forms. These details submitted in the website are captured directly into the Cases module.

Note

- Some of the standard fields may not be visible or editable depending on your organization's business process.
- In case you want to add or modify fields, please contact your System Administrator for more details on the usage of other fields.

Create Cases Individually

You can create cases individually by using the following:

- Filling in the details in the case creation form.
- Cloning the case with a few changes in the existing record.

- By default, the person who creates the case owns it.
- To change owner, click the **Change** link in the **Case Owner** field from the *Case Details* page and select another user.

To create cases

1. In the **Cases** module, click **New Case**.
2. In the *Create Case* page, enter the case details.
3. Click **Save**.

To clone cases

1. Click the **Cases** tab, click a particular case that you want to be cloned.
2. In the *Case Details* page, click **Clone**.
3. In the *Clone Case* page, modify the required case details.
4. Click **Save**.

10.1.2 Associate Cases

You can create a 360-degree view of the Case to display all the associated details, such as potentials, cases, open activities, history of the completed activities, attachments, and notes.

In the *Campaign Details* page, you can associate the following records:

To associate cases with other records

- **Open Activities:** To add tasks and events
- **Closed Activities:** To display all the closed tasks and events
- **Attachments:** To attach documents
- **Notes:** To add notes

10.1.3 Approve Cases

The import feature and Web forms have an option to enable manual approval of records. When this option is enabled, records imported or gathered through web forms are not added directly to the modules. They need to be approved first for other users to access the records. Records can be approved for the **Leads**, **Contacts**, **Cases** or **any other Custom module's** records.

Availability

Profile Permission Required: Users with the Approve Records permission can access this feature.

Check Feature Availability and Limits

To approve records

1. Click the **Leads** Tab.
2. In the *[Module] Home* page, under *[Module] Tools* section, click the **Approve [Module]** link.
3. In the *[Module] Approval* page, select the records for approval.
4. Click **Approve**.

10.1.4 Standard Fields

Following are the list of SalesGrow defined standard fields available in the Cases module:

Field Name	Description	Data type	Maximum Limit
Case Number	Display the case ID after creating a case.	Number	16 digit
Product Name	Select the product name related to the case.	Lookup	-
Case Owner	Select the name of the user to whom the case is assigned.	Lookup	-
Subject*	Specify the title of the Case. This field is mandatory.	Text box	Alphanumeric(255)
Priority	Select the priority of the Case from the drop-down list.	Pick list	-
Status*	Select the status of the Case from the drop-down list.	Pick list	-
Reported By	Displays the name of the contact.	-	-
Related To	Select the name of the contact who submitted the Case.	Lookup	-
Type	Select the type of problem. It can be a general question, feature request, or real issue in your product/service.	Pick list	-
Case Origin*	Select the source from which the case has been generated. You can select Email, Phone, or Website. If you select Email, you must specify the Email ID of	Pick list	-

	the customer.		
Email	Specify the Email ID of the contact.	Email	Alphanumeric and Special characters
Account Name	Select the account related to the case	Lookup	
Potential Name	Select the Potential related to the case	Lookup	
Phone	Specify the phone number of the customer	Text box	Alphanumeric(50)
Case Reason	Specify the reason for the case	Pick list	-
Description	Specify complete details about the case.	Text Area	32000 characters
Internal Comments	Specify follow-up notes about case.	Text Area	3000 characters
Solution	Specify the solution provided	Text Area	32000 characters
Add Comment	specify the follow-up notes about the solution	Text Area	32000 characters

10.2 Solutions

Solutions refer to the resources within the organization that enables solving repetitive problems encountered by customers.

10.2.1 Create Solutions

In SalesGrow CRM, you can create solutions by:

- **Entering data in the solution details form:** You can manually fill in the Solution details gathered from various external sources.
- **Importing solutions from external source:** You can gather data through various sources and import the CSV and XLS format files into SalesGrow CRM.

Note

- Some of the standard fields may not be visible or editable depending on your organization's business process.
- In case you want to add or modify fields, please contact your System Administrator for more details on the usage of other fields.

Create Solutions Individually

You can create solutions individually by using the following:

- Filling in the details in the solution creation form.
- Cloning the solution with few changes in the existing record.

Note

- By default, the person who creates the solution owns it.
- To change owner, click the **Change** link in the **Solution Owner** field from the *Solution Details* page and select another user.

To create solutions individually

1. In the **Solutions** module, click **New Solution**.
2. In the *Solutions Home* page, enter the solution details. (Refer to the table below)
3. Click **Save**.

To clone solutions

1. Click the **Solutions** tab, click a particular solution that you want to be cloned.
2. In the *Solution Details* page, click **Clone**.
3. In the *Clone Solution* page, modify the required solution details. (Refer to the table below)
4. Click **Save**.

List of Standard Fields

Field Name	Description	Data Type
Solution Title*	Specify the subject of the solution.	Text box, Alphanumeric (255)
Solution Owner	Select the SalesGrow CRM user's name to which the solution is assigned.	Pick list
Status	Select the status from the list	Pick list
Product Name	Select the name of the product to which the solution has to be associated.	Lookup
Question*	Specify the Question.	Text box
Answer*	Specify solution details.	Text box

Note

- You can add comments only in the edit mode.
- The *Add Comment* field will not be available while creating the solution.

10.2.2 Associate Solutions

Attach Documents to the Solution

You can attach additional documents to the solution.
To attach documents
This feature allows you to attach documents, spreadsheets and presentations to the solution.

10.2.3 Standard Fields

Following are the list of SalesGrow defined standard fields available in the Solutions module:

Field Name	Description	Data type	Maximum Limit
Solution Number	Display the case ID after creating a solution	Number	16 digit
Solution Title*	Specify the subject of the solution. This field is mandatory	Text box	Alphanumeric(255)
Solution Owner	Select the name of the user to whom the solution is assigned.	Pick list	-
Product Name	Select the name of the product to which the solution has to be associated.	Lookup	-
Question*	Select the priority of the solution from the drop-down list. This field is mandatory	Text box, Alphanumeric	Alphanumeric(255)
Answer*	Specify solution details. This field is mandatory	Text Area	-
Status	Specify the status of the solution.	Pick list	-
Created By	Displays the person created the solution first time.	Date/Time format	
Last Modified By	Displays the person modified the solution	Date/Time format	
Description	Specify any other details about solution.	Text box	32000 characters
Comments	Specify additional comments about the solution.	Text box	32000 characters

11. Inventory Management

SalesGrow CRM extends beyond the traditional CRM functions and supports complete sales cycle management by integrating Inventory Management features. These include **Products, Price Books, Vendors, Sales Orders, Quotes,** and **Invoices,** along with the Sales related modules, such as Leads, Accounts & Contacts, and Opportunities.

With the SalesGrow CRM Inventory Management features you can achieve seamless integration between pre-sales and post-sales accounting activities in a single application. In addition, you can also procure goods or services from the selected list of vendor.

11.1 Products

Products refer to the goods or services sold or procured by any organization.

11.1.1 Create Products

In SalesGrow CRM, you can create products by:

- **Entering data in the product details form:** You can manually fill in the Product details gathered from various external sources.

Note

- Some of the standard fields may not be visible or editable depending on your organization business process.
- In case you want to add or modify fields, please contact your System Administrator for more details on the usage of other fields.

Create Products Individually

You can create individual products by:

- Filling in the details in the product creation form.
- Cloning the products with a few changes in the existing product details.

To understand the SalesGrow defined standard fields in the Products module.

To create products individually

1. In the **Products** module, click **New Product**.
2. In the *Create Product* page, enter the product information.
   o Under *Product Information*, select the **Product Active** check box if you want the newly created product to be active.
      By default, the check box is selected.
3. Click **Save**.

To clone products

1. In the **Products** tab, click a particular product that you want to be cloned.
2. In the *Product Details* page, click **Clone**.
3. In the *Clone Product* page, modify the required details.
4. Click **Save**.

11.1.2 Associate Products

You can create a 360-degree view of the product to display all the associated details, such as products, trouble tickets, open activities, history of the completed activities, attachments, and notes.

In the *Product Details* page, you can update the following:

- **Price Books:** To add different list prices to the product.
- **Open Activities:** To add tasks and events to product.
- **Closed Activities:** To display the closed tasks and events to product.
- **Cases:** To add cases to the product.

- **Solutions:** To add solutions to the product.
- **Attachments:** To attach documents to the product.
- **Leads:** To add leads to the product
- **Contacts:** To add contacts to the product
- **Potentials:** To add potentials to the product
- **Accounts:** To add accounts to the product

11.1.3 Generate PO

In a typical business scenario, there is a lag between the time at which the stock is ordered and the time at which the stock is received. To handle this case, we have a Reorder Level for the products. Reorder level of the product is the point at which a new order is to be placed for the supply of products.
The reorder level is set so that products are purchased before the company runs out of stock to sell. It is always set as a number higher than zero, based on the time taken to receive the goods. In SalesGrow CRM, you can set the reorder level for each product and generate the purchase order for the products below the reorder level.

To generate PO for records below reorder level

1. Click the **Products** module.
2. In the *Products Home* page, click **Product Tools** > **Generate PO for Record below Reorder Level**.
3. In the *Generate PO for Record below Reorder Level* page, select the **Vendor** from the drop-down list.
   Note that only the vendors whose products are below the reorder level will be displayed here. The products below the reorder level will be listed on selecting the vendor.
4. Select the check box(es) of the products for which you need to generate the purchase orders.
5. Click **Generate Purchase Order**.
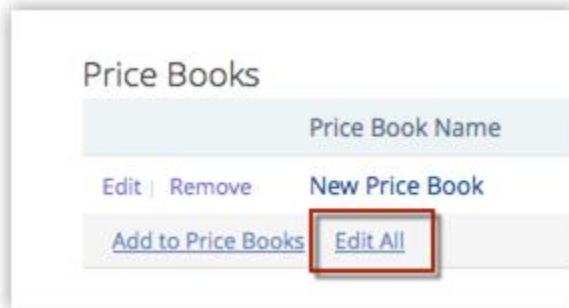   You will be directed to the *Create Purchase Order* page.

Update a Product's Multiple List Prices

A product may have multiple list prices that need to be updated often. You can edit them at any time.
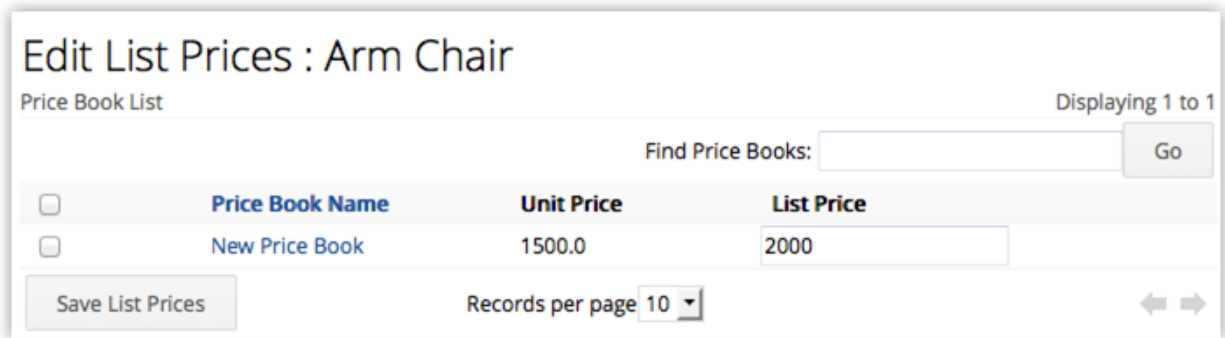
To update list prices

1. Login to your account and choose **Products**.
2. Select the product for which you wish to update the list prices.

3. In the *Price Books Related List*, click the **Edit All** link.

Price Books

Price Book Name

Edit | Remove   New Price Book

Add to Price Books   Edit All

4. In the *Edit List Prices* section, enter the new prices manually.

Edit List Prices : Arm Chair

Price Book List   Displaying 1 to 1

Find Price Books: [   ]   [Go]

	Price Book Name	Unit Price	List Price
☐	New Price Book	1500.0	2000

[Save List Prices]   Records per page 10 ▾   ⬅ ➡

5. Click **Save List Prices.**

Understand Stock Information Auto-Updates

The details of product quantity in the Stock Information section are updated automatically with reference to the sales order and purchase order and invoice. Following is the logic behind the automatic updates.

Quantity in Stock

Quantity in stock changes with respect to Invoice & Purchase Order

- Quantity in stock increases when a purchase order is delivered.
- Quantity in stock decreases when an already delivered purchase order is cancelled.
- Quantity in stock decreases with an invoice creation (this includes when a quote or sales order is converted to an invoice).
- Quantity in stock increases with an invoice cancellation.

Quantity in Demand:

- Quantity in demand increases when a sales order is created.

- Quantity in demand decreases when a sales order is delivered or cancelled.
  Quantity in demand also decreases when a sales order is converted to an invoice. The status of the sales order thus converted automatically changed to "delivered".

Quantity Ordered:

- Quantity ordered increases when a purchase order is created.
- Quantity ordered decreases when a purchases order is delivered or cancelled.

Example:
Following is an example that shows you how the quantity values vary at different stages for a given scenario.

You run a furniture business. You have 10 arm chairs in stock. Your have no sales order or purchase order. In that case, your quantity in stock would be 10, while your quantity in demand and quantity ordered would be 0.

You receive a sales order (created) for 4 chairs. Now, the quantity in demand increases. The stock information would be:

Stock Information

Usage Unit:	Box	Qty Ordered:	0.0
Qty in Stock:	10	Reorder Level:	0.0
Handler:		Qty in Demand:	4

You create a purchase order for 5 chairs. This will result in an increase in the quantity ordered.

Stock Information

Usage Unit:	Box	Qty Ordered:	5
Qty in Stock:	10	Reorder Level:	0.0
Handler:		Qty in Demand:	4

You deliver your the sales order for 4 chairs and create an invoice for the same. Here, your quantity in stock and quantity in demand decrease accordingly.

Your purchase order for 5 chairs has been delivered and your stock fills up again.

The stock flow is thus automated as you update sales order, purchase order and invoice details.

11.1.4 Standard Fields

Following are the list of SalesGrow defined standard fields available in the Products module:

Field Name	Description	Data type	Maximum Limit
Product Name*	Specify the name of the product. This field is mandatory.	Text box	Alphanumeric(50)
Product Owner	Select the name of the user to whom the product is assigned.	Pick list	
Product Code	Specify the product identification.	Text box	Alphanumeric(40)
Product Active	Specify the status of the product.	Check box	-
Vendor Name	Specify the name of the vendor.	Lookup	
Product Category	Select the category of the product.	Pick list	
Sales Start Date	Specify the date on which the product sales starts	Date	
Sales End Date	Specify the date on which the product sales ends	Date	
Created By	Displays the person created the product first time.	Date/Time format	
Modified By	Displays the person modified the product	Date/Time format	
Commission Rate	Specify the commission rate for selling the product.	Numeric	Decimal

Manufacturer	Select the name of the product manufacturer.	Pick list	-
Unit Price	Specify the unit price of the product.	Currency	
Taxable	Specify whether the product is a taxable product	Check-box	
Product Category	Select the category of the product.	Pick list	-
Support Start Date	Select the date on which the product support starts.	Date	-
Support Expiry Date	Select the date on which the product support ends.	Date	-
Usage Unit	Displays the unit price of the product.	Text box	Alphanumeric
Qty Ordered	Specify the number of units.	Text box	Integers
Qty in Stock	Displays the stock quantity	Text box	Integers
Reorder Level	Specify the Reorder value	Text box	Integers
Handler	Select the SalesGrow CRM user who is handling the product	Lookup	
Qty in Demand	Displays the demand quantity	Text box	Integers
Description	Specify any other details about product.	Text area (long text)	32000 characters

11.2 Price Books

Price Books refer to the agreed price for selling a product to a customer. Based on the agreed terms, the prices can even vary for different customers.

11.2.1 Create Price Books

In SalesGrow CRM, you can create price books by:

- **Entering data in the price book details form**: You can manually fill in the Price Book details.
- **Importing price books from external sources**: You can gather data through various sources and import CSV and XLS files into SalesGrow CRM.

Note

- Some of the standard fields may not be visible or editable depending on your organization's business process.
- In case you want to add or modify fields, please contact your System Administrator for more details on the usage of other fields.

Create Price Books Individually

You can create price books individually by:

- Filling in the details in the price book creation form.

- Cloning the price book with a few changes in the existing price book details.

To create price books individually

1. In the **Price Books** module, click **New Price Book**.
2. In the *Create Price Book* page, enter the price information.
3. Click **Save**.

Note

- By default, the person who creates the price book owns it.
- To change owner, click the **Change** link in the **Price Book Owner** field and select another user.

To clone price books

1. In the **Price Books** module, click a particular record that you want to be cloned.
2. In the *Price Books Details* page, click **Clone**.
3. In the *Clone Price Books* page, modify the required details.
4. Click **Save**.

11.2.2 Associate Price Book

You can create a 360-degree view of the price book to display all the associated details. In the *Price Book Details* page, you can update the following details:

- **Products:** To add products.
- **Attachments:** To attach documents.

Update List Prices of Multiple Products

You may have one Price Book that applies for more than one product. If you wish to update the list prices of products under one price book, you can update them either manually or by using the *Import List Price* option.
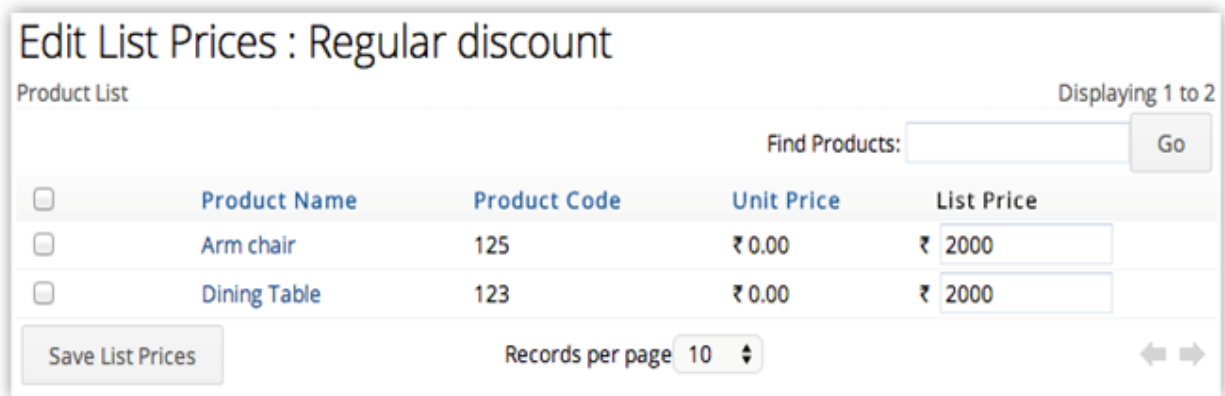
To update list price manually

1. Click the **Price Books** module.
2. Select the desired price book.

3. In the *Products* related List, click the **Edit All** link.
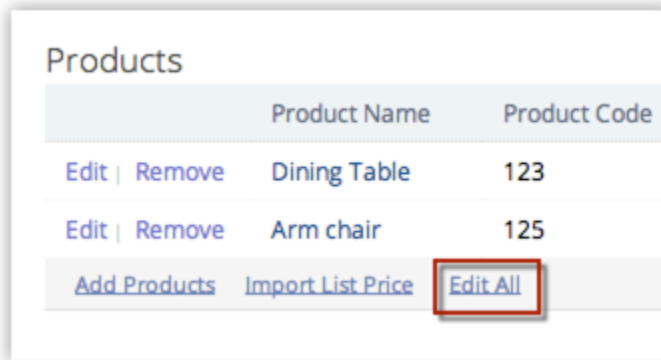
4. In the *Edit List Prices* section, enter the new prices manually.

5. Click **Save List Prices.**

To use the *Import* option,

1. Click the **Price Books** module.
2. Select the price book for which you wish to update the list prices.
3. In the *Products* related List, click the **Import List Price** link.

4. In the **Import Products** wizard, select the file with the new list prices.

Import Products

You can associate Products to a Price Book or update list price for the Products associated

Select a file to upload:
[Browse...] No file selected.
[only XLS, XLSX, CSV and VCF formats are supported]

Find Products by :

Product Name ▾
Product Name
Product Id

[Next] [Cancel]

The file formats accepted are XLS, XLSX, CSV and VCF.

5. Select a value for **Find Products by**, either Product Name or Product ID.
6. Map the fields and click **Import**.
    The **Import Summary** appears.

Import Summary of Product1.csv Undo this import

Total records in file 3

Added 0   Updated 1   Skipped 2

The list prices are updated in the Price Books. These products will also be associated with the appropriate Price Books in the Products Related List as well.

11.2.3 Set Discounts

While creating price book information, you have an option to choose your Pricing Model based on your business requirement. You can choose from the following options:

- No discount
- Flat Discount
- Differential Discount

To define the pricing model with no discount

1. In the **Price Books** module, click **New Price Book**.
2. In the *Create Price Book* page, enter a **Price Book Name**.
3. Select **Pricing Model** from the drop down list.
   By default, the Pricing Model displayed is **None**.
4. Click **Save**.

To define the pricing model with Flat or Differential discount

1. In the **Price Books** module, click **New Price Book**.
2. In the *Create Price Book* page, enter a **Price Book Name**.
3. Select **Flat**/**Differential** discount from the drop down list.
4. In the *Pricing Details* section, enter the **From Range** , **To Range** and **Discount (%)**.
5. Click **Add** to enter more slots of pricing details and discounts.
6. Click **Save**.

11.2.4 Standard Fields

Following are the list of SalesGrow defined standard fields available in the Price Books module:

Field Name	Description	Data type	Maximum Limit
Price book Owner	Select the name of the user to whom the price book is assigned.	Lookup	-
Price book Name*	Specify the name of the Price Book. This field is mandatory.	Text box	Alphanumeric(50)
Active	Select the Active check box to set the status of the Price Book as active.	Check box	-
Pricing Model	Select the model of the price book - Flat or differential	Pick list	-
Created By	Displays the person created the Price book first time.	Date/Time format	
Modified By	Displays the person modified the Price book.	Date/Time format	
Description	Specify any other details about Price Book.	Text area (long text)	32000characters
Pricing details • From Range • To Range	Specify the Pricing details	• From Range - Text box • To Range - Text box	Decimal (20)

• Discount		• Discount - Percent	

11.3 Vendors

Vendors are the companies, individuals or contractors from whom your organization procures products and/or services.

11.3.1 Create Vendors

In SalesGrow CRM, you can create vendors by:

- **Entering data in the vendor details form:** You can manually fill in the Vendor details in the form.
- **Importing vendors from external sources:** You can gather data through various sources and import the CSV and XLS files into SalesGrow CRM.

Note

- Some of the standard fields may not be visible or editable depending on your organization's business process.
- In case you want to add or modify fields, please contact your System Administrator for more details on the usage of other fields.

Create Vendors Individually

You can create vendors individually by:

- Filling in the details in the vendor creation form.
- Cloning the vendor with a few changes in the existing vendor details.

To create vendors individually

1. In the **Vendors** module, click **New Vendor**.
2. In the *Create Vendor* page, enter the vendor details.
3. Click **Save**.

To clone vendors

1. In the **Vendors** tab, click a particular vendor that you want to be cloned.
2. In the *Vendor Details* page, click **Clone**.
3. In the *Clone Vendor* page, modify the required details.
4. Click **Save**.

11.3.2 Associate Vendors

You can create a 360-degree view of the vendor to display all the associated details, such as products, activities, contacts, and purchase orders.

- **Products**: To add products purchased from vendor.
- **Purchase Orders**: To create purchase orders for getting products from the vendors.
- **Open Activities**: To add new tasks and events.
- **Closed Activities**: To track closed tasks and events.
- **Attachments**: To add files to the vendor record.
- **Contacts**: To add contacts related to vendors.

11.3.3 Standard Fields

Following are the list of SalesGrow defined standard fields available in the Vendors module:

Field Name	Description	Data type	Maximum Limit
Vendor Owner	Select the name of the user to whom the Vendor details is assigned.	Lookup	
Vendor Name*	Specify the name of the vendor. This field is mandatory	Text box	Alphanumeric(50)
Phone	Specify the phone number of the vendor	Text box	Alphanumeric(40)
E-mail	Specify the E-mail ID of the vendor	Email	Alphanumeric and Special characters(100)
Website	Specify the Web site URL of the vendor	URL	Alphanumeric and Special characters(50)
GL Account	Select the general ledger account	Pick List	-
Category	Specify the category of the vendor	Text box	Alphanumeric(40)
Created By	Displays the person created the Price book first time.	Date/Time format	
Modified By	Displays the person modified the Price book.	Date/Time format	
Vendor Address - Street - City - State	Specify the address of the vendor	- Street - Text box - City - Text box - State - Text box	- Alphanumeric(250) - Alphanumeric(30) - Alphanumeric(30) - Alphanumeric(30)

• Postal Code • Country		• Code - Text box • Country- Text box	• Alphanumeric(30)
Description	Specify any other details about vendor	Text area (long text)	32000 characters

11.4 Quotes

Quotes are legal agreements between a customer and a vendor to deliver the requested product within the specified time at the agreed upon price.

11.4.1 Create Quotes

In SalesGrow CRM, you can store quote details by manually entering the data in the quote details form.

Note

- Some of the standard fields may not be visible or editable depending on your organization business process.
- In case you want to add or modify fields, please contact your System Administrator for more details on the usage of other fields.

Create Quotes Individually

To create quotes

1. In the **Quotes** module, click **New Quote**.
2. In the *Create Quotes* page, enter the quotes details.

3. Under the *Product Details* section, click **Add Line Items.**

4. In the **Choose Products** popup, type in at least one character of the Product Name or Product Code to search for the desired product and choose it from the drop-down. The only way to add products is by choosing them from the drop-down. You cannot add them otherwise. Also, the search results are affected by words seperated by a space. For example, typing "P" will bring up "i pad", provided the product name is stored as "i pad" (as two words). If it is stored as "ipad", typing "p" will not bring up the product. To bring this up, you must type "i".

To know more about a product listed in the drop-down, point your mouse to the *Info* icon next to the product.

5. Enter the desired quantity for the chosen product.
For more info on the stock quantity of the chosen product, point the mouse to the *Info* icon next to quantity text box.

6. Add more product lines as required by clicking the **Add another line** link.
Note that you can add up to 100 line items in a quote.

282

7. Once you have added all product lines, click **Add Products** to add them to the quote. All the details required for the chosen line item (including taxes, price book discounts and product description for the chosen product) will be populated automatically.

Product Details

Product Details	List Price (INR)	Quantity	Amount (INR)	Discount (INR)	Tax (INR)	Total (INR)
Arm Chair (0001765) These leather armchairs and leather club chairs offer exceptional comfort	2000.00	4	8000.00	0.00	300.00	8300.00

Sub Total	INR 8300.00
Discount	INR 0.00
Tax	INR 0.00
Adjustment	0
Grand Total	INR 8300.00

Add Line Items

If you have more than one item, simply drag and drop line items to reorder the product lines.To view the *Product Quantity* and *Unit price*, point your mouse to the **Product Name/Product Code**. To view *Total after Discount*, point your mouse to **Discount**.

Product Details

#	Product Details	List Price (INR)
1	**Arm Chair** (0001765) These leather ar... r club chairs offe... ort and are of he...	3,000

Unit Price 2,000

Qty in Stock 7

Discount (INR)	Tax (INR)	Total (INR)
1,800 ⓘ	360	7,560

Total After Discount : 7,200

If you wish to add the list price from an associated price book, click on the *Price Book Look Up* icon to browse and select the desired price book.
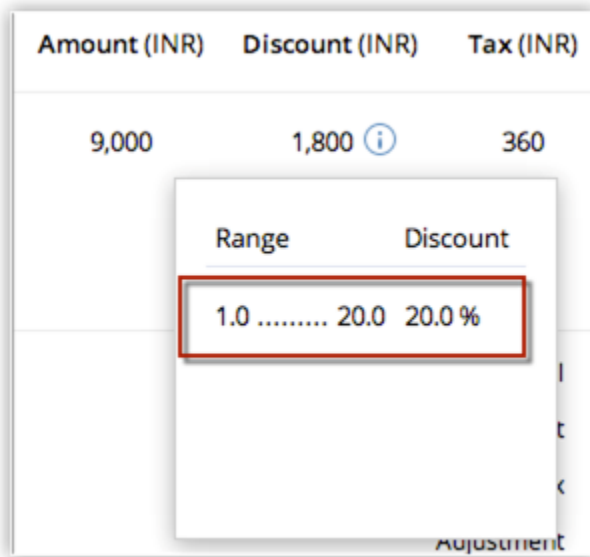

List Price ($)		Quantity	Amount ($)
2000		5	10000.00

PriceBook Name Lookup

8. To edit the details of a line item, click on the *Edit* icon that appears when you point your mouse to a value such as tax or discount. Editing a value changes any related values automatically.

Discount (USD)	Tax (USD)	Total (USD)
1800.00	360.00 ⊙	7560.00

Sales Tax

| 5 | % | 360 |

0.00

To view the Discount and Range details for the associated price book, point your mouse to the **Discount**

value and click on the *Info* icon that appears.

9. Click **Save**.

Note

- The *Product Details* section is not customizable. If you wish to add any other details in the section such as Billing info, that is not possible.

To clone quotes

1. In the **Quotes** tab, click a particular quote that you want to be cloned.
2. In the *Quote Details* page, click **Clone**.
3. In the *Clone Quotes* page, modify the required details.
4. Click **Save**.

11.4.2 Associate Quotes

You can create a 360-degree view of the quote to display all the associated details, such as sales orders, open activities, and history of the completed activities.

- **Sales Orders**: To display sales orders associated with quotes.
- **Open Activities**: To add tasks and events related to quotes.
- **Closed Activities**: To display the completed activities.
- **Attachments**: To attach documents.
- **Emails**: To view email messages.

11.4.3 Convert Quotes

Convert Quotes to Sales Order/Invoice

To convert quotes to a sales order or invoice

1. Click the **Quotes** tab.
2. In the *Quotes Home* page, select the required quote.
3. In the *Quote Details* page, click **Convert**, and then select **Sales Order / Invoice**.
   The Sales Order/Invoice Details page will be displayed.

Note

- In case you have custom fields in your quote, you must map it with the corresponding custom fields in the sales order/invoice. The mapping must be done before you convert the quote.
- To map custom fields of the Quotes module
  1. Click **Setup** > **Customization** > **Fields**.
  2. Select the **Quotes** module from the **Module list**.
  3. Click **Map Custom Field**.
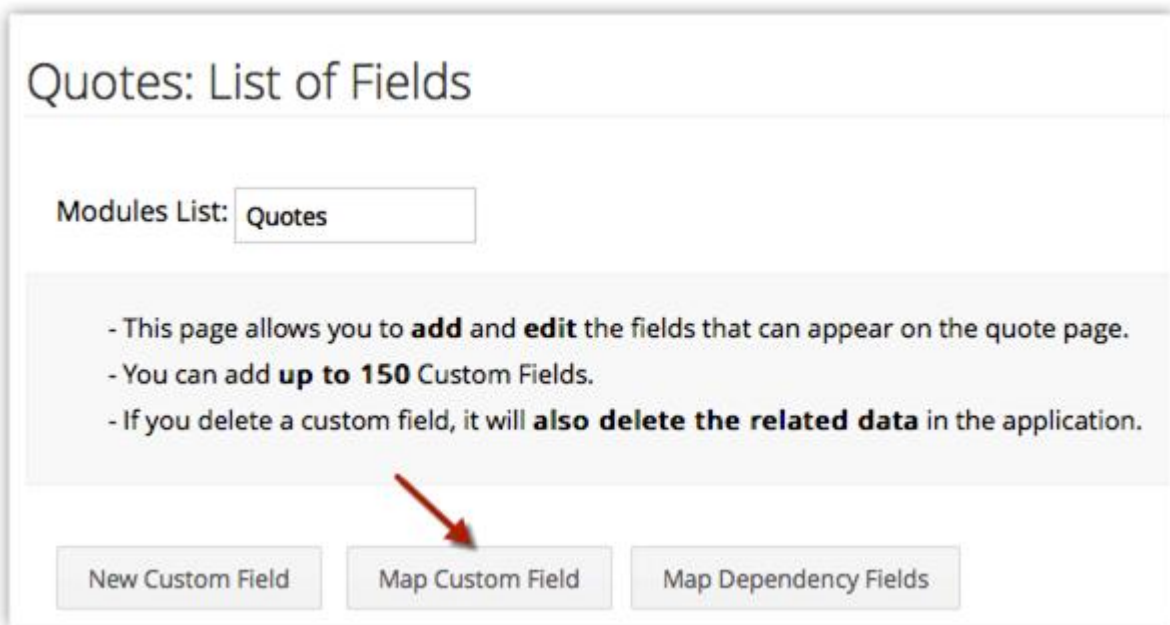
4. In the *Map Fields for Quotes Conversion* page, map the Quotes custom fields to the corresponding fields in Sales Order/Invoice.

Map Fields for Quotes Conversion

Map each of your organizations quote custom fields to each of your custom sales order, invoice fields.

These mappings will be used when you convert quote:

Mapping Information

Quote Field	Sales Order Field	Invoice Field
Quote ID:	Sales Order ID	Invoice ID
Quote verified by:	Sales Order Verified By	Invoice Verified By

Save   Cancel

5. Click **Save**.
   Now the **Quotes** custom fields are mapped with their corresponding fields in **Sales Order/Invoice**. The values will be converted accordingly on Quotes conversion.

11.4.4 Standard Fields

Following are the list of SalesGrow defined standard fields available in the Quotes module:

Field Name	Description	Data type	Maximum Limit
Quote Owner	Select the name of the user to whom the quote is assigned.	Lookup	-
Subject*	Specify the name of the quote. This field is mandatory.	Text box	Alphanumeric(50)
Potential Name	Specify the potential name for which the quote has to be created.	Text box	Alphanumeric(40)
Quote Stage	Specify the status of the quote.	Check box	-
Valid Till	Specify the date till the quote is valid after sending to the prospective customer.	Date	-

Contact Name	Specify the contact to which the quote has to be created.	Lookup	-
Account Name	Specify the account to which the quote has to be created.	Lookup	
Carrier	Select the name of the carrier manufacturer.	Pick list	-
Shipping	Select the category of the quote.	Text box	Alphanumeric(50)
Inventory Manager	Specify the person responsible for shipping the shipment to the account or contact.	Text box	Alphanumeric(50)
Account Name*	Specify the account name to which the quote has to be created. This field is mandatory	Lookup	
Created By	Displays the person created the Price book first time.	Date/Time format	
Modified By	Displays the person modified the Price book.	Date/Time format	
Billing Address • Street • City • State • Zip • Country	Specify the primary address of the contact.	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country- Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Shipping Address • Street • City • State • Zip • Country	Specify the shipping address of the contact (if any).	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country -	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)

		Text box	
Product Name *	Select the product name.This field is mandatory	Lookup	-
Quantity in Stock	Displays the stock quantity.	Numeric	Integers
Quantity*	Specify the quantity for which the sales order has to be generated. This field is mandatory	Numeric	Integers
Unit Price*	Displays the unit price of the product.	Currency	
List Price*	Select the product list price from Price Book or specify the product price. This field is mandatory	Lookup and Numeric	Integers
Total	Displays the amount of the selected products.	Text box	Alphanumeric
Terms & Conditions	Specify the terms and conditions that are associated with quote.	Text area	
Description	Specify any other details about quote.	Text area	32000 characters

11.5 Sales Orders

Sales Orders are confirmation of sales, generated after the customer sends a purchase order based on your quotes.

11.5.1 Create Sales

In SalesGrow CRM, you can store sales order details by entering data in the sales order details form.

Note

- Some of the standard fields may not be visible or editable depending on your organization business process.
- In case you want to add or modify fields, please contact your System Administrator for more details on the usage of other fields.

Create Sales Orders Individually

To create sales orders

1. In the **Sales Orders** module, click **New Sales Order**
2. In the *Create Sales Orders* page, enter the sales order details.
3. Under the *Product Details* section, click **Add Line Items.**

4. In the **Choose Products** popup, type in at least one character of the Product Name or Product Code to search for the desired product and choose it from the drop-down. The only way to add products is by choosing them from the drop-down. You cannot add them otherwise. Also, the search results are affected by words seperated by a space. For example, typing "P" will bring up "i pad", provided the product name is stored as "i pad" (as two words). If it is stored as "ipad", typing "p" will not bring up the product. To bring this up, you must type "i".

To know more about a product listed in the drop-down, point your mouse to the *Info* icon next to the product.

5. Enter the desired quantity for the chosen product.
   For more info on the stock quantity of the chosen product, point the mouse to the *Info* icon next

to quantity text box.

6. Add more product lines as required by clicking the **Add another line** link.
   Note that you can add up to 100 line items in a sales order.
7. Once you have added all product lines, click **Add Products** to add them to the sales order. All the
   details required for the chosen line item (including taxes, price book discounts and product
   description for the chosen product) will be populated automatically.

Simply drag and drop line items if you wish to reorder the product lines.To view the *Product Quantity*
and *Unit price*, point your mouse to the **Product Name/Product Code**. To view *Total after Discount*,
point your mouse to **Discount**.

If you wish to add the list price from an associated price book, click on the *Price Book Look Up* icon to browse and select the desired price book.

8. To edit the details of a line item, click on the *Edit* icon that appears when you point your mouse to a value such as tax or discount. Editing a value changes any related values automatically.

To view the Discount and Range details for the associated price book, point your mouse to the **Discount** value and click on the *Info* icon that appears.

9. Click **Save**.

Note

- The *Product Details* section is not customizable. If you wish to add any other details in the section such as Billing info, that is not possible.

To clone sales orders

1. In the **Sales Orders** tab, click a particular sales order that you want to be cloned.
2. In the *Sale Order Details* page, click **Clone**.
3. In the *Clone Sale Orders* page, modify the required details.
4. Click **Save**.

11.5.2 Associate Sales Orders

You can associate a sales order with other records such as, activities, attachments and notes.

- **Invoices:** To create invoices from the sales order.
- **Open Activities:** To add tasks related to sales order.
- **Closed Activities:** To display the closed activities.
- **Attachments:** To add files and notes to sales order.
- **Emails:** To view e-mail messages.

Convert Sales Order to Invoice

To convert sales order to invoice

1. Click the **Sales Orders** tab.
2. In the *Sales Orders Home* page, select the required sales order.
3. In the *Sales Order Details* page, click **Convert**, and then select **Invoice**.
   The Invoice Details page will be displayed.

Note

- In case you have custom fields in your Sales Order, you must map it with the corresponding custom fields in the invoice. The mapping must be done before you convert the sales order.
- To map custom fields of the **Sales Orders** module
   1. Click **Setup** > **Customization** > **Fields**.
   2. Select the **Sales Orders** module from the **Module list**.
   3. Click **Map Custom Field**.

Sales Orders: List of Fields

Modules List: Sales Orders

- This page allows you to **add** and **edit** the fields that can appear on the sales order page.
- You can add **up to 150** Custom Fields.
- If you delete a custom field, it will **also delete the related data** in the application.

New Custom Field   Map Custom Field   Map Dependency Fields

4. In the *Map Fields for Sales Orders Conversion* page, map the Sales Order custom fields to the corresponding fields in Invoice. Note that the same page is displayed for Quotes conversion as well.

Map Fields for Sales Orders Conversion

Map each of your organizations quote custom fields to each of your custom sales order, invoice fields. These mappings will be used when you convert quote:

Mapping Information

Quote Field	Sales Order Field	Invoice Field
Quote ID:	Sales Order ID	Invoice ID
Quote verified by:	Sales Order Verified By	Invoice Verified By

Save   Cancel

5. Click **Save**.
   Now the **Sales Order** custom fields are mapped with their corresponding fields in **Invoice**. The values will be converted accordingly on Sales Order conversion.

11.5.3 Standard Fields

Following are the list of SalesGrow defined standard fields available in the Sales Orders module:

Field Name	Description	Data type	Maximum Limit
Sales Order Owner	Select the name of the user to whom the sales order is assigned.	Lookup	
SO Number	Display the Sales order ID after creating a case.	Number	16 digit
Subject*	Specify the name of the sales order. This field is mandatory.	Text box	Alphanumeric(50)
Potential Name	Select the potential for which the sales order has to be generated.	Lookup	-
Customer No	Specify the customer identification number (if any)	Text box	Alphanumeric(50)
Purchase Order	Select the reference purchase order.	Text box	-
Quote Name	Select the reference quote.	Lookup	-
Contact Name	Select the contact for which the sales order has to be generated.	Lookup	-
Due Date	Select the date	Date	-
Carrier	Select the carrier's name that ships the products from your warehouse to customer site.	Pick list	-
Pending		Text box	Alphanumeric(50)
Status	Specify the status of the sales order.	Pick list	-
Sales Commission	Specify the commission to the sales person upon closing the deal.	Numeric	float
Excise Duty	Specify the excise duty for the shipment	Text Box	Numeric
Account Name*	Specify the account name to which the	Lookup	-

	sales order has to be created.This field is mandatory		
Assigned To	Select the user's name to whom the sales order handling duty is assigned.	Select option	-
Created By	Displays name of the user created the Sales order first time.	Date/Time	
Modified By	Displays name of the user modified the Sales order	Date/Time	
Billing Address • Street • City • State • Zip • Country	Specify the primary address of the contact.	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country- Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Shipping Address • Street • City • State • Zip • Country	Specify the shipping address of the contact (if any).	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Product Name *	Select the product name.This field is mandatory	Lookup	-
Quantity in Stock	Displays the stock quantity.	Numeric	Integers
Quantity*	Specify the quantity for which the sales order has to be generated. This field is mandatory	Numeric	Integers
Unit Price*	Displays the unit price of the product.	Currency	

List Price*	Select the product list price from Price Book or specify the product price. This field is mandatory	Lookup and Numeric	Integers
Tax	Specify the tax component of the products	Currency	-
Adjustments	Specify if there are any adjustments, such as discounts, or extra charges etc.	Currency	-
Total	Displays the amount of the selected line item.	Currency	-
Terms & Conditions	Specify the terms and conditions that are associated with sales order.	Text area (long text)	
Description	Specify any other details about sales order.	Text area (long text)	32000 characters

11.6 Purchase Orders

Purchase Orders are a legally bound order-placement document for procuring products or services from vendors.

11.6.1 Create Purchase Orders

In the SalesGrow CRM system, you can store purchase order details by entering data into the Purchase Order form.

Note

- Some of the standard fields may not be visible or editable depending on your organization business process.
- In case you want to add or modify fields, please contact your System Administrator for more details on the usage of other fields.

To create purchase orders

1. In the **Purchase Orders** module, click **New Purchase Order**.
2. In the *Create Purchase Order* page, enter the relevant details.
3. Under the *Product Details* section, click **Add Line Items**.

Product Details

Product Details	List Price	Quantity	Amount
		0	0

Product Description

(-)Discount 0

Total After Discount 0

(+)Tax 0

Total 0

Add Product

Sub Total: 0

(-)Discount 0

(+)Tax: 0

Adjustment: 0

Grand Total: 0

4. In the **Choose Products** popup, type in at least one character of the Product Name or Product Code to search for the desired product and choose it from the drop-down. The only way to add products is by choosing them from the drop-down. You cannot add them otherwise. Also, the search results are affected by words seperated by a space. For example, typing "P" will bring up "i pad", provided the product name is stored as "i pad" (as two words). If it is stored as "ipad", typing "p" will not bring up the product. To bring this up, you must type "i".
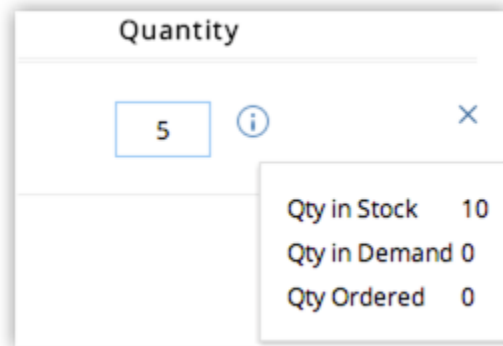
Product

Search: [_____] Search Product

Product Name ▲	Product Active	Product Code	Qty In Stock	Unit Price	Taxable
LCD	true		9900	500.00	true
Product Name	**Product Active**	**Product Code**	**Qty In Stock**	**Unit Price**	**Taxable**

Showing 1 to 1 of 1 entries   Previous 1 Next

To know more about a product listed in the drop-down, point your mouse to the *Info* icon next to the product.

5. Enter the desired quantity for the chosen product.
   For more info on the stock quantity of the chosen product, point the mouse to the *Info* icon next to quantity text box.

Quantity

5 ⓘ   ✕

Qty in Stock   10
Qty in Demand 0
Qty Ordered   0

6. Add more product lines as required by clicking the **Add another line** link.
   Note that you can add up to 100 line items in a purchase order.
7. Once you have added all product lines, click **Add Products** to add them to the purchase order. All the details required for the chosen line item (including taxes, price book discounts and product description for the chosen product) will be populated automatically.

Simply drag and drop line items if you wish to reorder the product lines. To view the *Product Quantity* and *Unit price*, point your mouse to the **Product Name/Product Code**. To view *Total after Discount*, point your mouse to **Discount**.
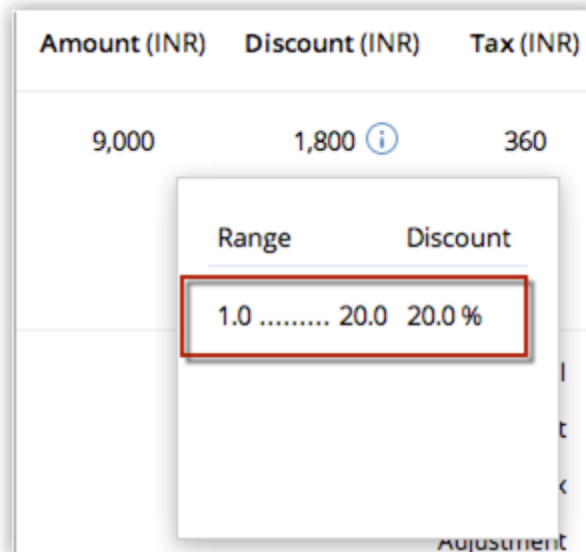
If you wish to add the list price from an associated price book, click on the *Price Book Look Up* icon to browse and select the desired price book.

8. To edit the details of a line item, click on the *Edit* icon that appears when you point your mouse to a value such as tax or discount. Editing a value changes any related values automatically.

9. To view the Discount and Range details for the associated price book, point your mouse to the **Discount** value and click on the *Info* icon that appears.

10. Click **Save**.

Note

- The *Product Details* section is not customizable. If you wish to add any other details in the section such as Billing info, that is not possible.

11.6.2 Associate Purchase Orders

By default, you can associate a purchase order with other records such as, activities, attachments, and notes.

In the *Purchase Order Details* page, you can update the following:

- o **Activities**: To add tasks related to purchase orders
- o **Attachments**: To attach files to purchase orders
- o **Emails**: To view emails

11.6.3 Standard Fields

Following are the list of SalesGrow defined standard fields available in the Purchase Orders module:

Field Name	Description	Data type	Maximum Limit
Purchase Order Owner	Select the name of the user to whom the purchase order is assigned.	Lookup	
PO Number	Display the Sales order	Number	16 digit

	ID after creating a case.		
Subject*	Specify the name of the purchase order. This field is mandatory.	Text box	Alphanumeric(50)
Vendor Name*	Specify the name of the vendor.	Text box	Alphanumeric(20)
Requisition No	Specify the number in which the purchase order is requested	Text box	Alphanumeric(20)
Tracking Number	Specify the number to track the purchase order	Text box	
Contact Name	Specify the contacts name to which the invoice has to be created.	Lookup	
Carrier	Select the carrier's name that ships the products from your warehouse to customer site.	Pick list	-
Purchase Order Date	Specify the date on which purchase order is created.	Date	-
Due Date	Select the due date.	Date	-
Excise Duty	Specify the excise duty for the shipment	Text box	
Sales Commission	Specify the commission to the sales person upon closing the deal.	Currency	Float
Status	Specify the status of the purchase order.	Check box	-
Assigned To	Select the SalesGrow CRM user name to whom the purchase order handling duty is assigned. This field is mandatory	Select option	-
Created By	Displays the person created the Price book first time.	Date/Time format	
Modified By	Displays the person modified the Price book.	Date/Time format	
Billing Address	Specify the primary address of the contact.	• Street - Text box	• Alphanumeric(250) • Alphanumeric(30)

		City - Text box	Alphanumeric(30)
• Street • City • State • Zip • Country		• City - Text box • State - Text box • Code - Text box • Country- Text box	• Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Shipping Address • Street • City • State • Zip • Country	Specify the shipping address of the contact (if any).	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Product Name *	Select the product name.This field is mandatory	Lookup	-
Quantity in Stock	Displays the stock quantity.	Numeric	Integers
Quantity*	Specify the quantity for which the sales order has to be generated. This field is mandatory	Numeric	Integers
Unit Price*	Displays the unit price of the product.	Currency	
List Price*	Select the product list price from Price Book or specify the product price. This field is mandatory	Lookup and Numeric	Integers
Total	Displays the amount of the selected products.		
Terms & Conditions	Specify the terms and conditions that are associated with purchase order.	Text area (long text)	
Description	Specify any other details about purchase order.	Text area (long text)	32000 characters

11.7 Invoices

Invoices are bills issued by the vendor to the customers along with the goods or services with the purpose of receiving payment.

11.7.1 Create Invoices

In SalesGrow CRM, you can create invoices by entering data in the Invoice details form.

Note

- Some of the standard fields may not be visible or editable depending on your organization business process.
- In case you want to add or modify fields, please contact your System Administrator for more details on the usage of other fields.

Create Invoice Individually

You can create invoices individually by:

- Filling in the details in the invoice creation form.
- Cloning the invoices with a few changes in the existing invoice details.

To create invoices individually

1. In the **Invoices** module, click **New Invoice**.
2. In the *Create Invoices* page, enter the invoice details.
3. Under the *Product Details* section, click **Add Line Items**

Product Details

Product Details	List Price	Quantity	Amount
		0	0

Product Description

(-)Discount 0
Total After Discount 0
(+)Tax 0
Total 0

Add Product

Sub Total: 0
(-)Discount 0
(+)Tax: 0
Adjustment: 0
Grand Total: 0

4. In the **Choose Products** popup, type in at least one character of the Product Name or Product Code to search for the desired product and choose it from the drop-down. The only way to add products is by choosing them from the drop-down. You cannot add them otherwise. Also, the

305

search results are affected by words seperated by a space. For example, typing "P" will bring up "i pad", provided the product name is stored as "i pad" (as two words). If it is stored as "ipad", typing "p" will not bring up the product. To bring this up, you must type "i".
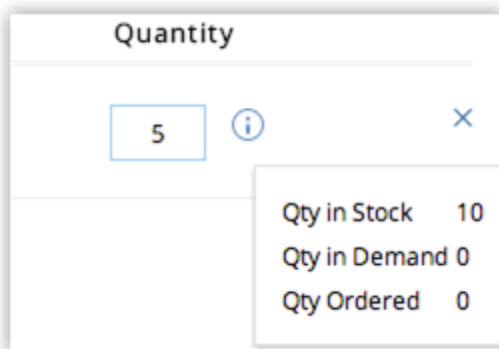
Product

Product Name ▲	Product Active	Product Code	Qty In Stock	Unit Price	Taxable
LCD	true		9900	500.00	true
Product Name	Product Active	Product Code	Qty In Stock	Unit Price	Taxable

Showing 1 to 1 of 1 entries   Previous 1 Next

To know more about a product listed in the drop-down, point your mouse to the *Info* icon next to the product.

5. Enter the desired quantity for the chosen product.
    For more info on the stock quantity of the chosen product, point the mouse to the *Info* icon next to quantity text box.

Quantity

    5   ⓘ   ✕

          Qty in Stock   10
          Qty in Demand 0
          Qty Ordered   0

6. Add more product lines as required by clicking the **Add another line** link.
    Note that you can add up to 100 line items in an invoice.
7. Once you have added all product lines, click **Add Products** to add them to the invoice. All the details required for the chosen line item (including taxes, price book discounts and product description for the chosen product) will be populated automatically.

Product Details

Product Details	List Price (INR)	Quantity	Amount (INR)	Discount (INR)	Tax (INR)	Total (INR)
Arm Chair (0001765)	2000.00	4	8000.00	0.00	300.00	8300.00
These leather armchairs and leather club chairs offer exceptional comfort						

Sub Total	INR 8300.00
Discount	INR 0.00
Tax	INR 0.00
Adjustment	0
Grand Total	INR 8300.00

Add Line Items

Simply drag and drop line items if you wish to reorder the product lines.To view the *Product Quantity* and *Unit price*, point your mouse to the **Product Name/Product Code**. To view *Total after Discount*, point your mouse to **Discount**.

Product Details

#	Product Details	List Price (INR)
1	Arm Chair (0001765)	3,000
	These leather ar... r club chairs offe... ort and are of he...	Unit Price 2,000 Qty in Stock 7

Discount (INR)	Tax (INR)	Total (INR)
1,800 ⓘ	360	7,560

Total After Discount : 7,200

If you wish to add the list price from an associated price book, click on the *Price Book Look Up* icon to browse and select the desired price book.
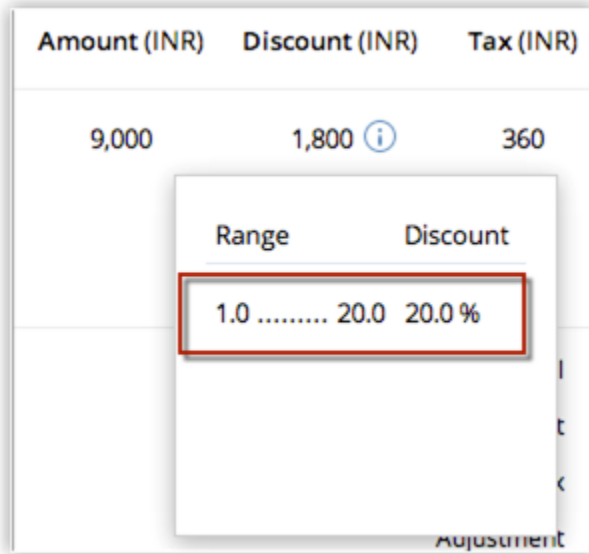
List Price ($)	Quantity	Amount ($)
2000	5	10000.00

PriceBook Name Lookup

8. To edit the details of a line item, click on the *Edit* icon that appears when you point your mouse to a value such as tax or discount. Editing a value changes any related values automatically.

Discount (USD)	Tax (USD)	Total (USD)
1800.00	360.00 ⊙	7560.00

Sales Tax

| 5 | % | 360 |

0.00

To view the Discount and Range details for the associated price book, point your mouse to the

Discount value and click on the *Info* icon that appears.

9. Click **Save**.

Note

- The *Product Details* section is not customizable. If you wish to add any other details in the section such as Billing info, that is not possible.

To clone invoices

1. In the **Invoices** tab, click a particular invoice that you want to be cloned.
2. In the *Invoice Details* page, click **Clone**.
3. In the *Clone Invoice* page, modify the required details.
4. Click **Save**.

11.7.2 Associate Invoices

You can associate an invoice with the other records such as, activities, attachments and notes.

- **Open Activities**: To add tasks and events related to invoices.
- **Closed Activities**: To display the completed activities.
- **Attachments**: To attach documents.
- **Emails**: To view email messages.

11.7.3 Standard Fields

Following are the list of SalesGrow defined standard fields available in the Invoices module:

Field Name	Description	Data type	Maximum Limit

Invoice Owner	Select the name of the user to whom the invoice is assigned.	Lookup	
Subject	Specify the name of the invoice. This field is mandatory.	Text box	Alphanumeric(50)
Sales Order	Select the reference Sales order (if any).	Lookup	-
Purchase Order	Select the reference Purchase order.	Text Box	
Customer No.	Specify the customer identification number (if any).	Text box	Alphanumeric(50)
Excise Duty	Specify the excise duty for the shipment	Text box	Numeric
Invoice Date	Specify the date on which the invoice is created.	Date	-
Due Date	Specify the invoice due date as per your payment terms.	Date	-
Sales Commission	Specify the commission to the sales person upon closing the deal.	Currency	Float
Account Name	Specify the account name to which the invoice has to be created. This field is mandatory	Lookup	-
Contact Name	Specify the contacts name to which the invoice has to be created.	Lookup	
Status	Specify the status of the invoice.	Check box	-
Created By	Displays the person who created the Invoice.	Date/Time format	
Modified By	Displays the person who modified the Invoice.	Date/Time format	
Billing Address	Specify the primary address of the	• Street - Text box	• Alphanumeric(250) • Alphanumeric(30)

• Street • City • State • Zip • Country	contact.	• City - Text box • State - Text box • Code - Text box • Country- Text box	• Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Shipping Address • Street • City • State • Zip • Country	Specify the shipping address of the contact (if any).	• Street - Text box • City - Text box • State - Text box • Code - Text box • Country - Text box	• Alphanumeric(250) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30) • Alphanumeric(30)
Product Name	Select the product name.This field is mandatory	Lookup	-
Quantity in Stock	Displays the stock quantity.	Numeric	Integers
Quantity	Specify the quantity for which the sales order has to be generated. This field is mandatory	Numeric	Integers
Unit Price	Displays the unit price of the product.	Currency	
List Price	Select the product list price from Price Book or specify the product price. This field is mandatory	Lookup and Numeric	Integers
Total	Displays the amount of the selected products.	Currency	-
Terms & Conditions	Specify the terms and conditions that	Text area	

	are associated with invoice.		
Description	Specify any other details about invoice.	Text area	32000 characters

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