Customer Relationship Management (CRM) Module Quick Reference

The CRM Module enables the management of all interactions between your organization and current, as well as potential, customers.

1. **Overview**

   a. *Opportunity Manager* – Enables the management of sales opportunities.

   b. *Account Manager* – Enables the management of customer accounts.

   c. *Contact Manager* – Enables the management of contacts.

   d. *Campaign Manager* – Enables the management of sales campaigns.

   e. *Aircraft Manager* – Enables the management of aircraft.

   f. *Aircraft Forecast* – Enables forecasting of scopes having a particular scope code(s) that are assigned to aircraft of a particular model(s).

   g. *Literature Manager* – Enables the management of literature items developed for sales purposes.

   h. *Communication Manager* – Enables the management of communication developed for sales purposes.

   i. *Case Manager* – Enables the management of customer issues.

   j. *Scheduler* – Enables the management of your schedule and employed resources.

2. Setup

a. Administration Tables – From the **Main Menu** toolbar, left-click **CRM**. The CRM toolbar will appear. Left-click **Administration** and select **Table List by Code**.
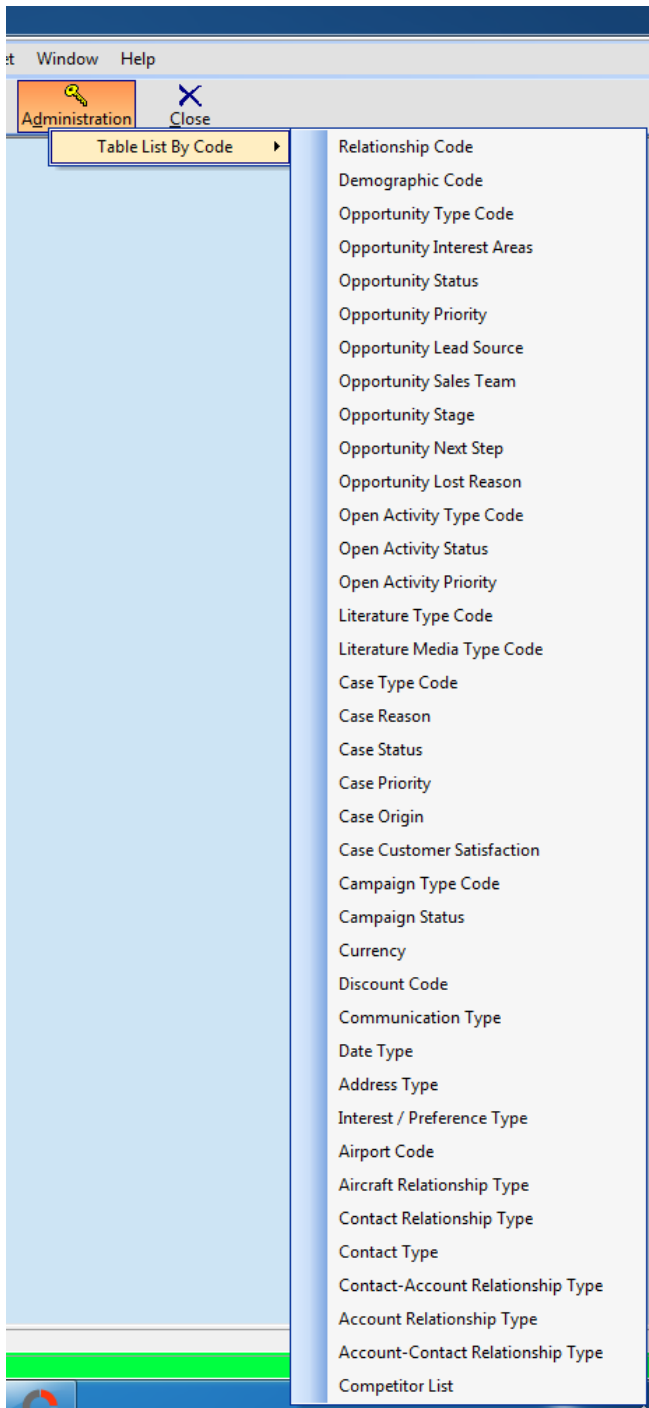
The matrix below identifies which sections use each table.

| Table	Opportunity Manager	Account Manager	Contact Manager	Campaign Manager	Aircraft Manager	Aircraft Forecasting	Literature Manager	Communication Manager	Case Manager	Scheduler
Relationship Code										
Demographic Code										
Opportunity Type Code	X									
Opportunity Interest Areas	X									
Opportunity Status	X									
Opportunity Priority	X									
Opportunity Lead Source	X									
Opportunity Sales Team	X									
Opportunity Stage	X									
Opportunity Next Step	X									
Opportunity Lost Reason	X									
Open Activity Type Code	X								X	
Open Activity Status	X								X	
Open Activity Priority	X								X	
Literature Type Code							X			
Literature Media Type Code							X			
Case Type Code									X	
Case Reason									X	
Case Status									X	
Case Priority									X	
Case Origin									X	
Case Customer Satisfaction									X	
Campaign Type Code				X						
Campaign Status				X						
Currency		X*								
Discount Code										
Communication Type								X		
Date Type			X							
Address Type			X							
Interest / Preference Type			X							
Airport Code			X*							
Aircraft Relationship Type		X	X							
Contact Relationship Type			X							
Contact Type			X							
Contact-Account Relationship Type			X							
Account Relationship Type		X								
Account-Contact Relationship Type		X								
Competitor List	X									

* Not Unique to CRM Module

b. Scheduler Resources – From the CRM toolbar, left-click the **Scheduler** button and left-click **My Resources**.
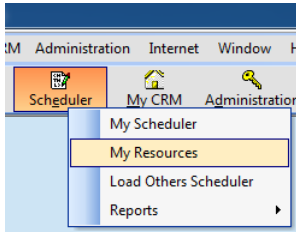
i. The **Scheduler Resources** search window will appear.
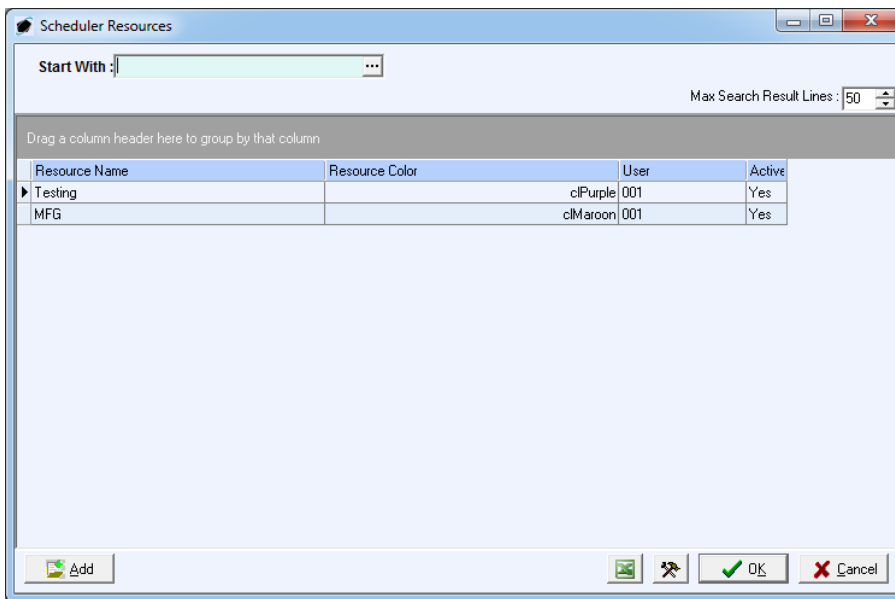
ii. Left-click the **Add** button.

iii. The **CRM Scheduler Resources** window will appear.
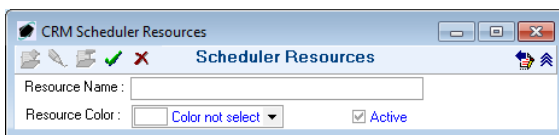
1. **Resource Name** field – Enter the resource name.

2. **Resource Color** field – Select the color that the resource should appear on the scheduler.

3. **Active flag** – Ensure flag is marked as "checked" to identify the resource is currently active.

iv. Left-click the green arrow in the **CRM Scheduler Resources** window toolbar to save the record.

3. Opportunity Manager

Enables the management of sales opportunities, related information (including interests, open activities, and information regarding opportunity loss), associated interactions (including sales quotes, component work orders, maintenance work orders and aircraft).

a. From the CRM toolbar, left-click the **Opportunities** button and left-click **Opportunity Management**.
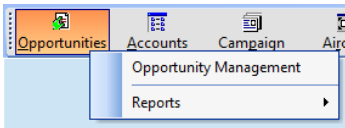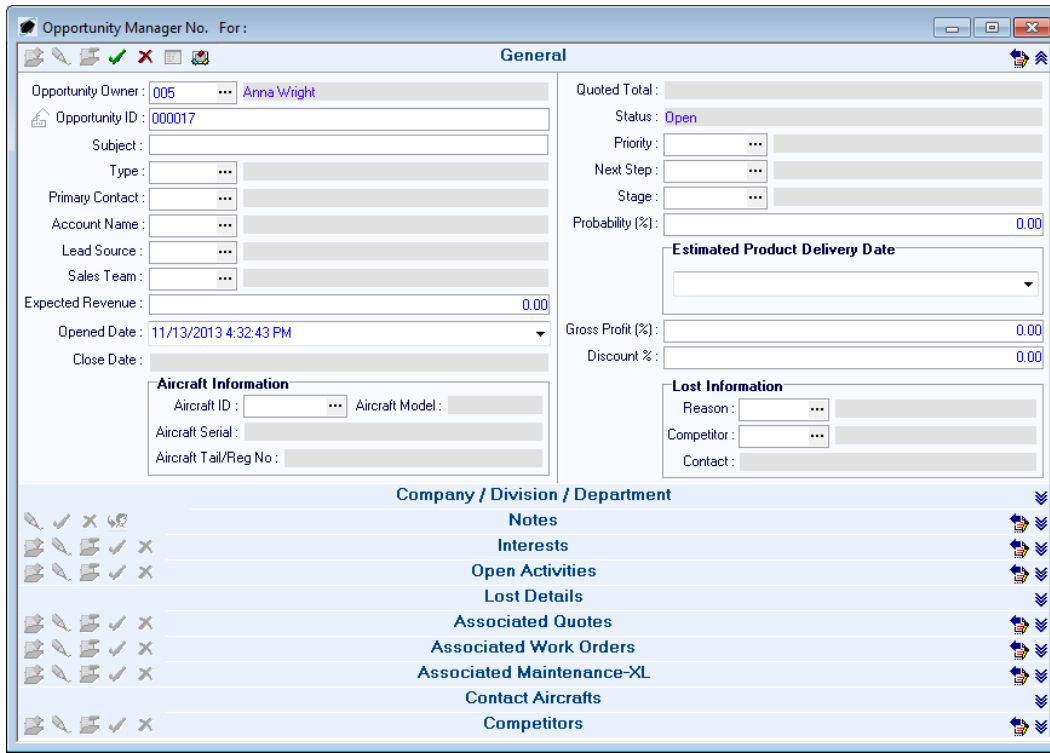
b. The **Opportunity Manager** search window will appear.
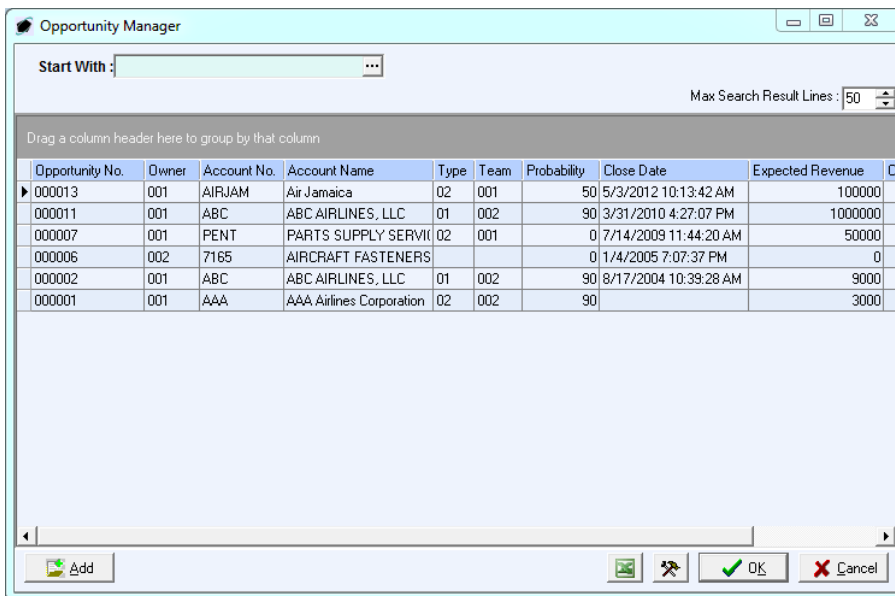
c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.

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d. The **Opportunity Manager** window will appear.

i. **General** section

1. Displays general information about each opportunity.

2. Enables classification of each opportunity.

3. Enables link to a particular aircraft.

4. Enables classification of loss information.

ii. **Company / Division / Department** section – Enables identification of the company, division, and department with which the opportunity is associated.

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iii. **Notes** section – Enables general notes to be recorded about the opportunity; a change history of those notes is also included.
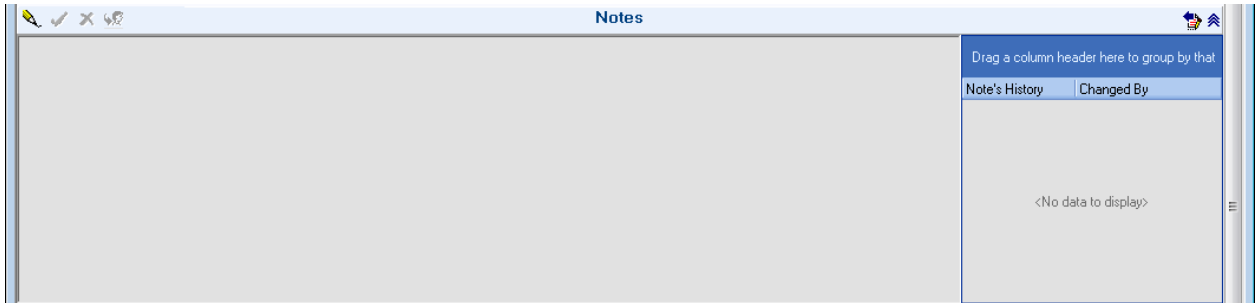
iv. **Interests** section – Enables recording details of the interests of the customer.
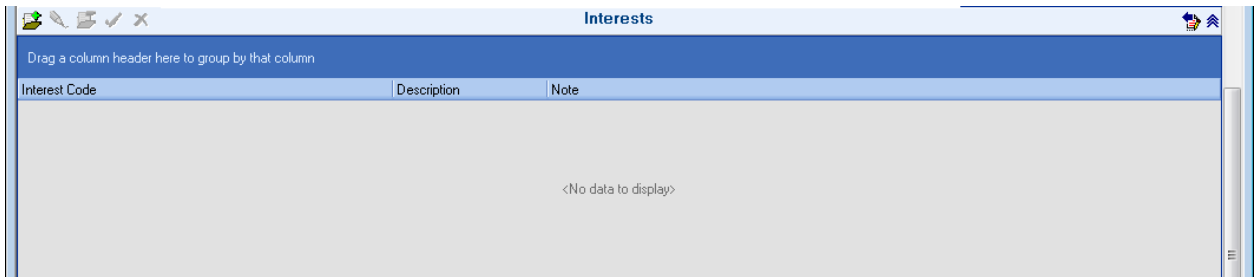
v. **Open Activities** section – Enables recording of pending activities related to the opportunity.
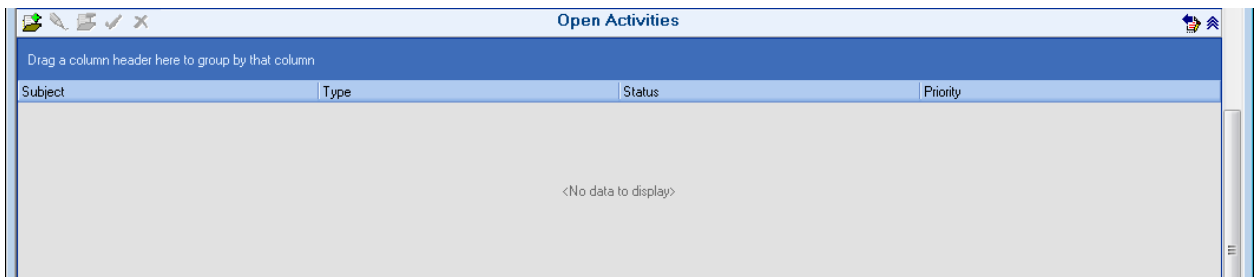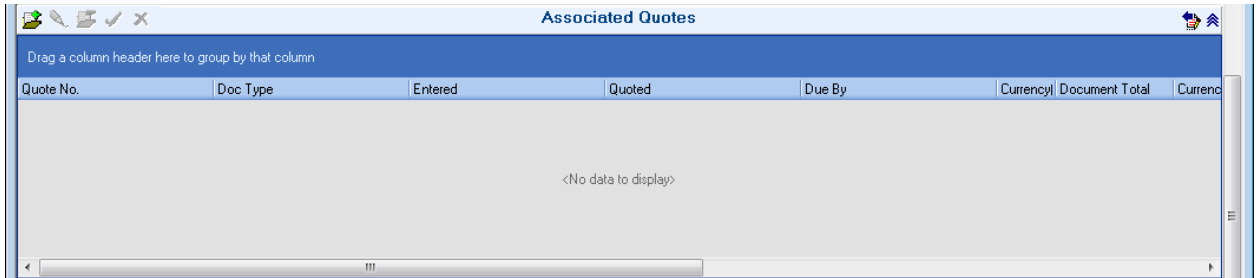
vi. **Lost Details** section - Enables notes to be recorded about the details of the opportunity if it was lost.
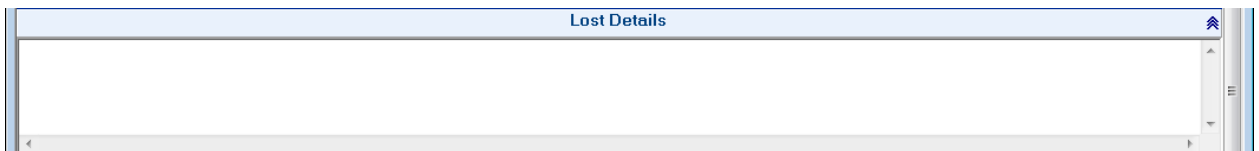
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vii. **Associated Quotes** section – Enables link to particular sales quotes associated with the selected customer.
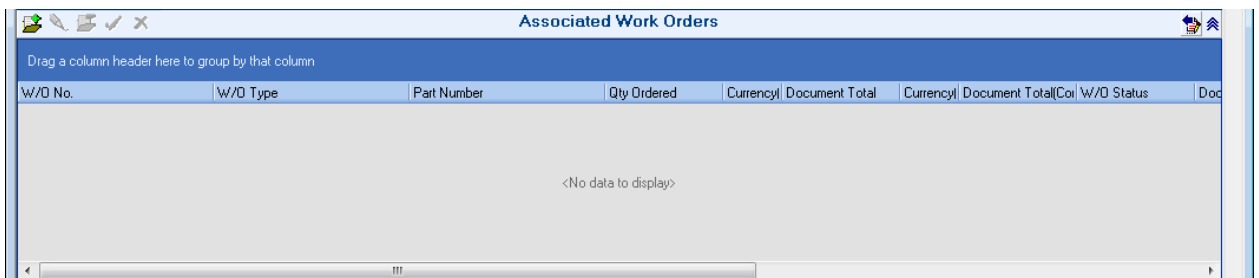
viii. **Associated Work Orders** section - Enables link to particular component work orders associated with the selected customer.
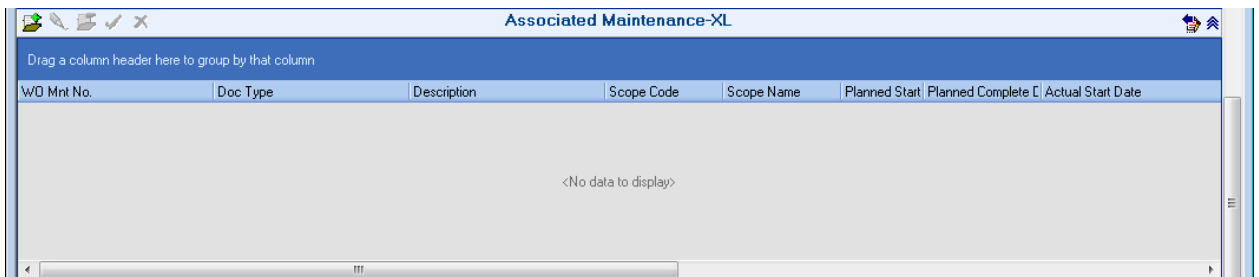
ix. **Associated Maintenance-XL** section - Enables link to particular maintenance work orders associated with the selected customer.

x. **Contact Aircrafts** section – Displays aircraft associated with the selected customer.

xi. **Competitors** section – Enables recording a list of possible competitors for the opportunity.
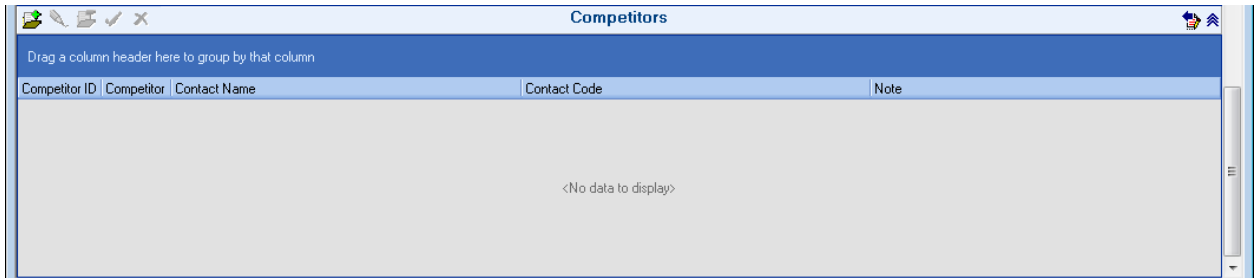
e. Reports - From the CRM toolbar, left-click the **Opportunities** button and left-click **Reports**.
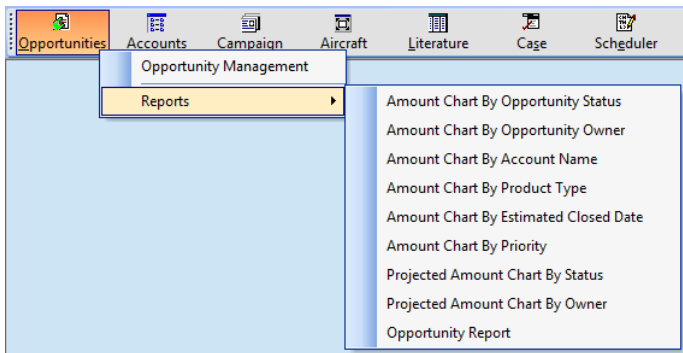
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4. Account Manager

Enables the management of customer accounts (displays much of the information from the Customer Record), associated interactions (including opportunities, cases, communications, call tracking and emails) and relationships (to other accounts, contacts, aircraft and aircraft billing).

a. From the CRM toolbar, left-click the **Accounts** button and left-click **Accounts**.
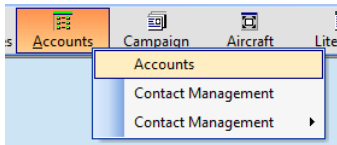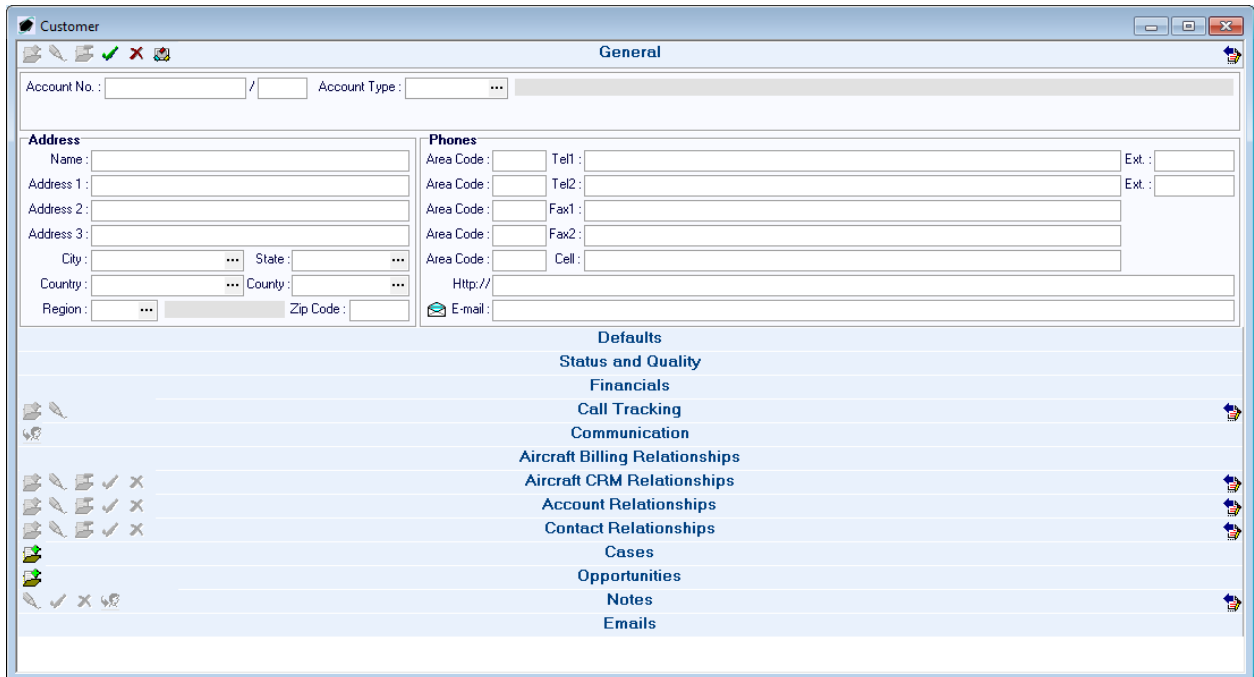
b. The **Customers List** search window will appear.
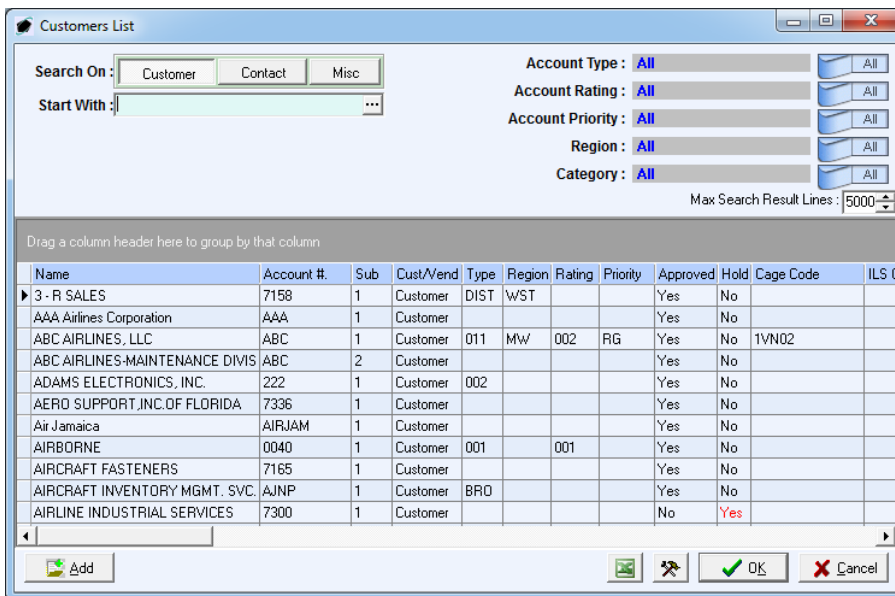
c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.
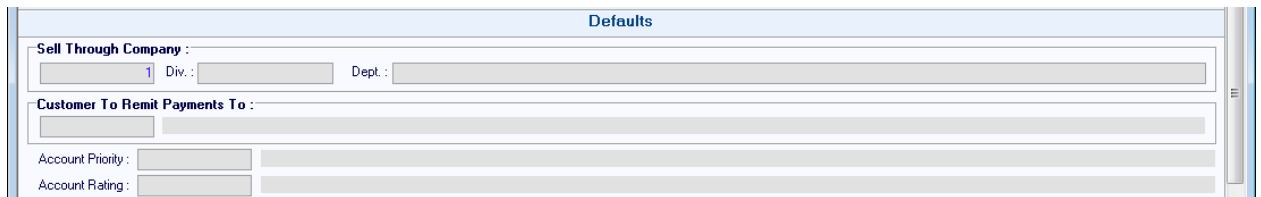
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d. The **Customer** window will appear.

i. **General** section – Displays general information about the customer

ii. **Defaults** section
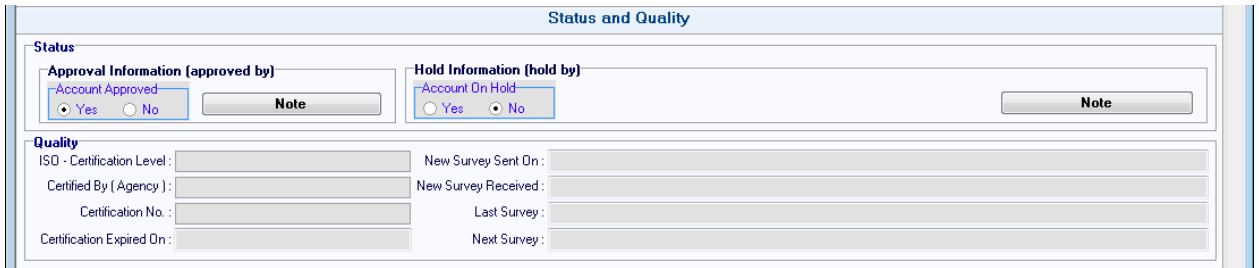
1. Enables identification of the default company, division, and department that is assigned to documents associated with the customer.

2. Enables identification of the default **Remit To** address.

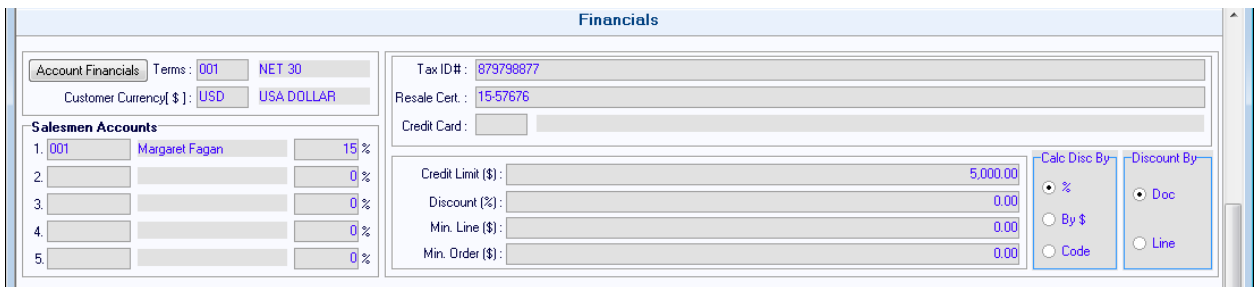3. Enables identification of the customer priority and rating.
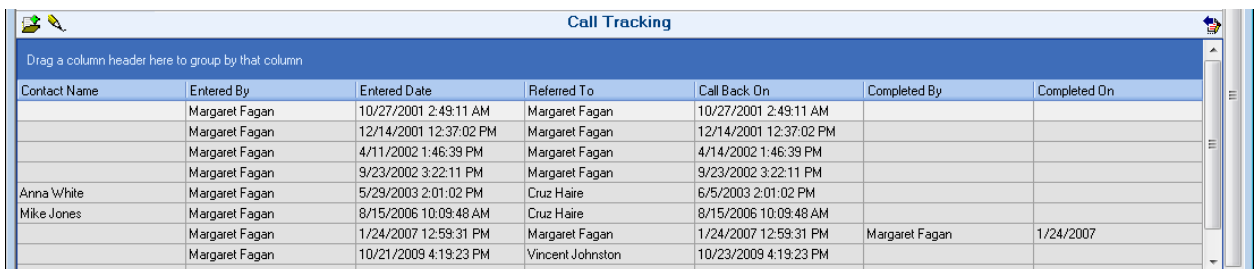
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iii. **Status and Quality** section

1. Displays customer approval and hold information

2. Displays customer quality information

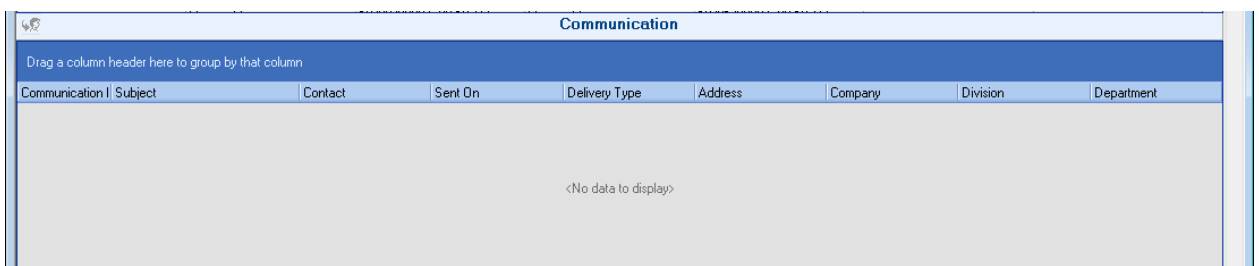iv. **Financials** section – Displays customer financial information including default salesmen and credit limit.

v. **Call Tracking** section – Displays all calls related to the selected customer.

vi. **Communication** section – Displays all communications related to the selected customer.

vii. **Aircraft Billing Relationships** section – Displays any aircraft with which the selected customer is associated on the aircraft record.

Aircraft ID	Model	Serial no.	Description	Type	Contact	Note

Aircraft Billing Relationships
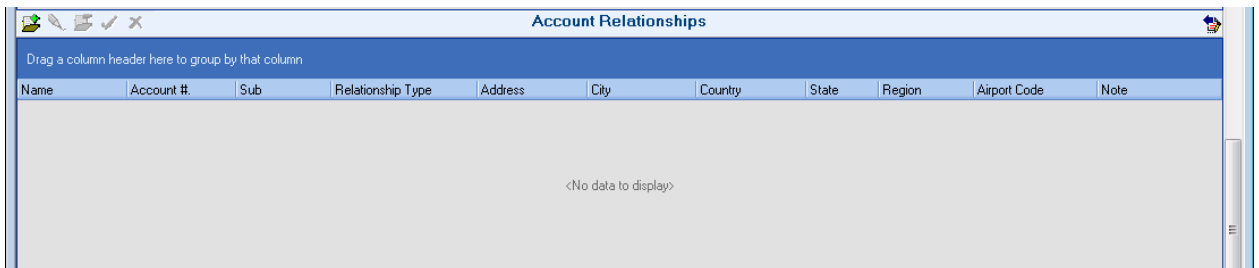
Drag a column header here to group by that column

<No data to display>

viii. **Aircraft CRM Relationships** section – Enables link to particular aircraft that are not identified on the aircraft record.

Aircraft CRM Relationships

Drag a column header here to group by that column

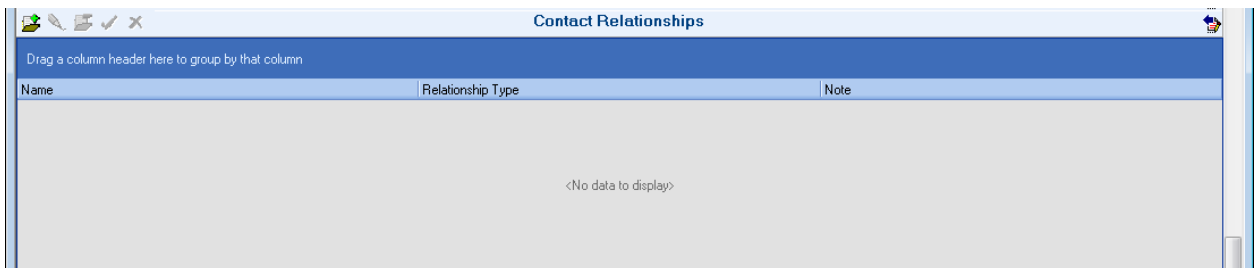| Aircraft ID	Relationship	Model	Serial No.	Description	Aircraft Type	Note

<No data to display>

ix. **Account Relationships** section – Enables link to other customer accounts and the ability to identify the type of relationship between the two.

Account Relationships

Drag a column header here to group by that column

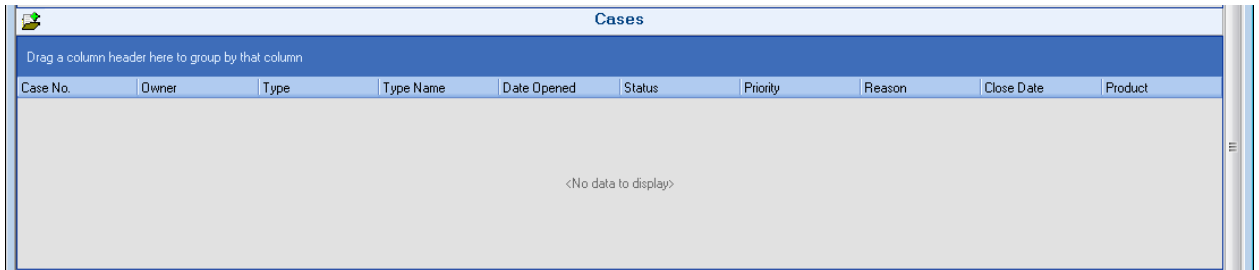| Name	Account #.	Sub	Relationship Type	Address	City	Country	State	Region	Airport Code	Note

<No data to display>

x. **Contact Relationships** section – Enables link to contacts and the ability to identify the type relationship.

Contact Relationships

Drag a column header here to group by that column

Name	Relationship Type	Note

<No data to display>

xi. **Cases** section – Displays all cases related to the selected customer.

xii. **Opportunities** section - Displays all opportunities related to the selected customer.

xiii. **Notes** section – Enables general notes to be recorded about the customer; a change history of those notes is also included.

xiv. **Emails** section – Displays emails related to the selected customer.

5. Contact Manager
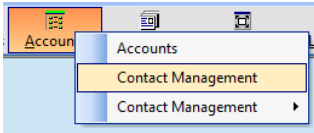
Enables the management of contacts, related information (including addresses, special dates and preferences), associated interactions (including opportunities, call tracking and emails) and relationships (to accounts, other contacts and aircraft).

a. From the CRM toolbar, left-click the **Accounts** button and left-click **Contact Management**.


b. The **Contacts** search window will appear.
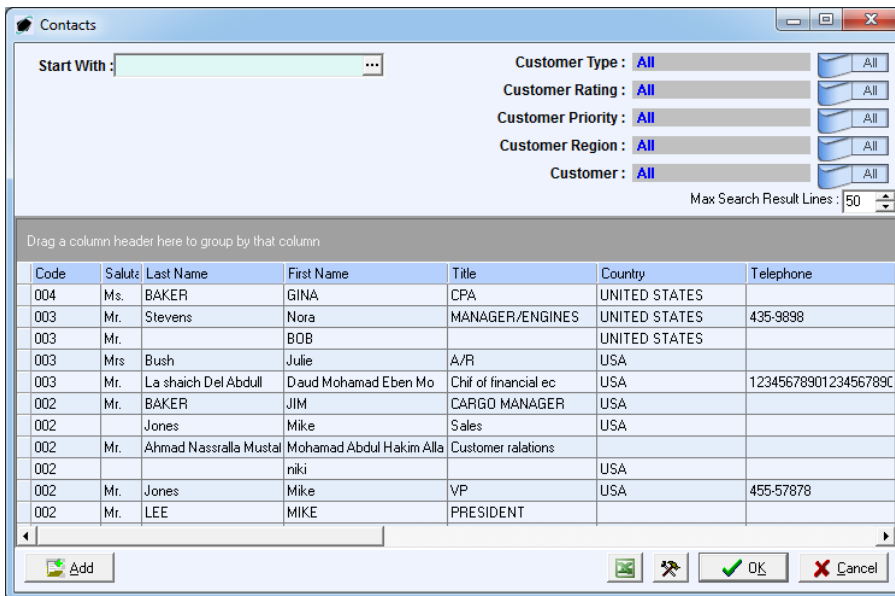
c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.
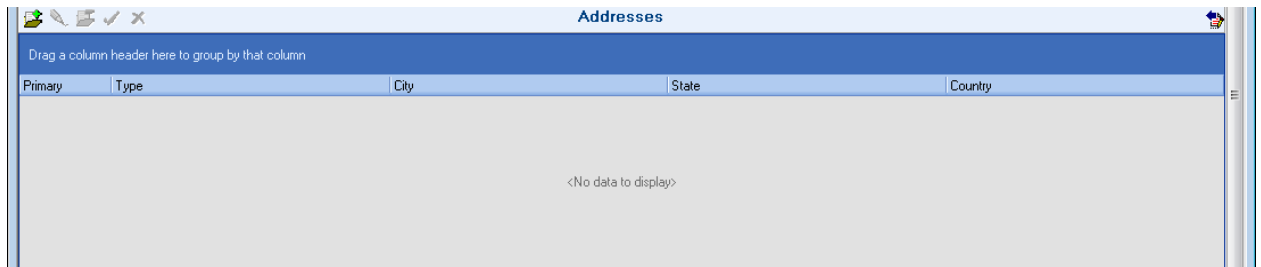
CONTINUE TO NEXT PAGE

d. The **Contact** window will appear.
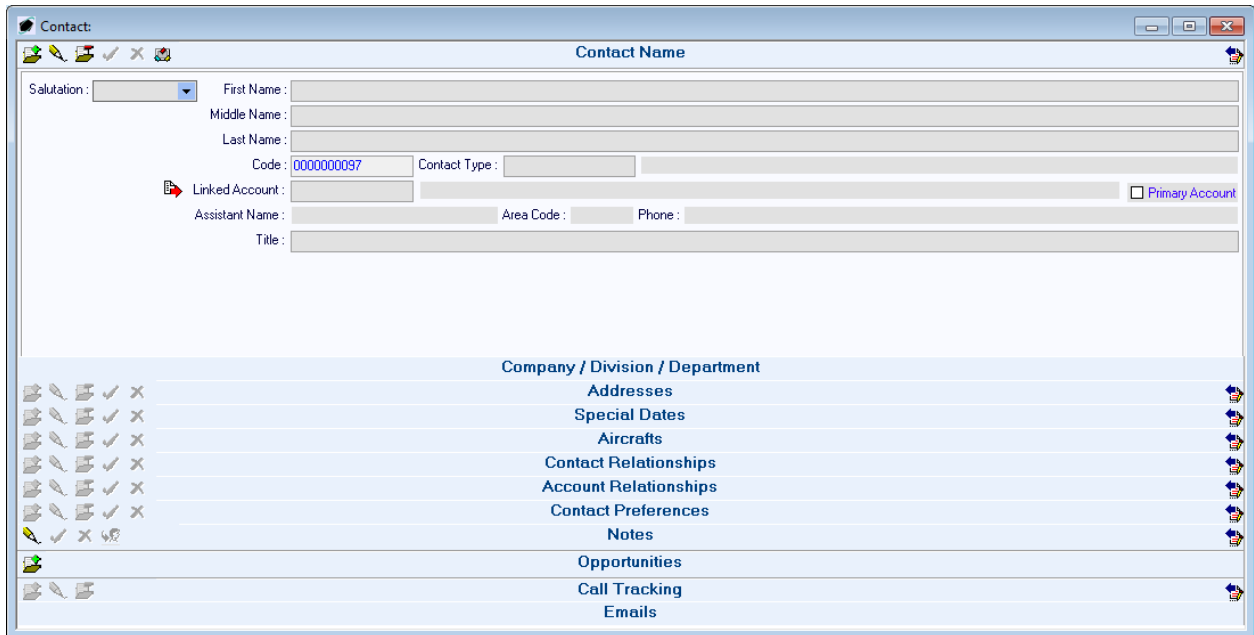
i. **Contact Name** section – Displays general information about the contact.

ii. **Company / Division / Department** section – Enables identification of the company, division, and department with which the contact is associated.
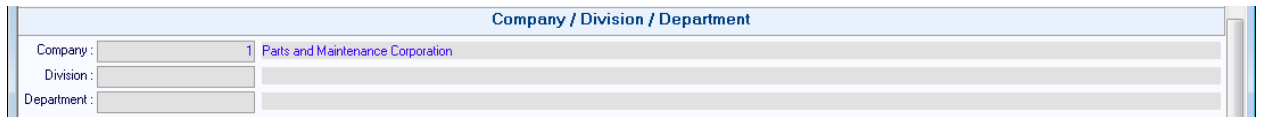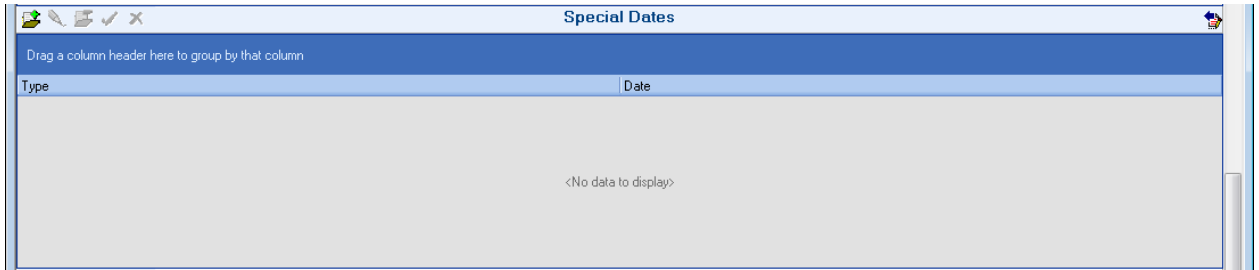

iii. **Addresses** section – Enables identification of multiple addresses associated with the contact.

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iv. **Special Dates** section – Enables identification of dates associated with the contact that should be remembered.

v. **Aircrafts** section – Enables link to particular aircraft with which the contact is associated.

vi. **Contact Relationships** section – Enables link to other contacts and the ability to identify the type relationship.

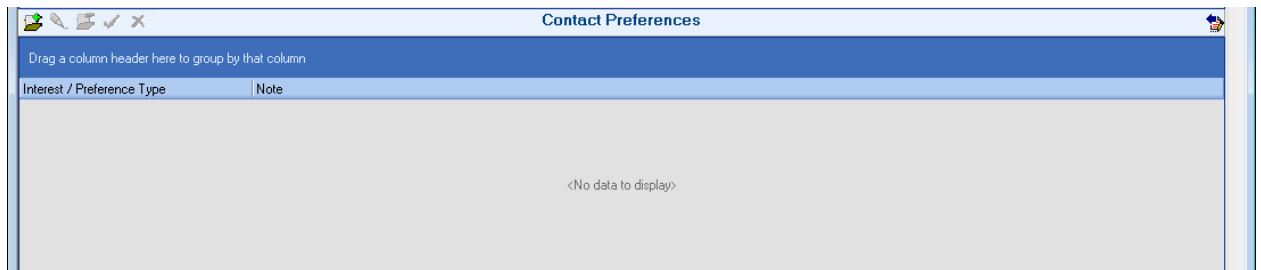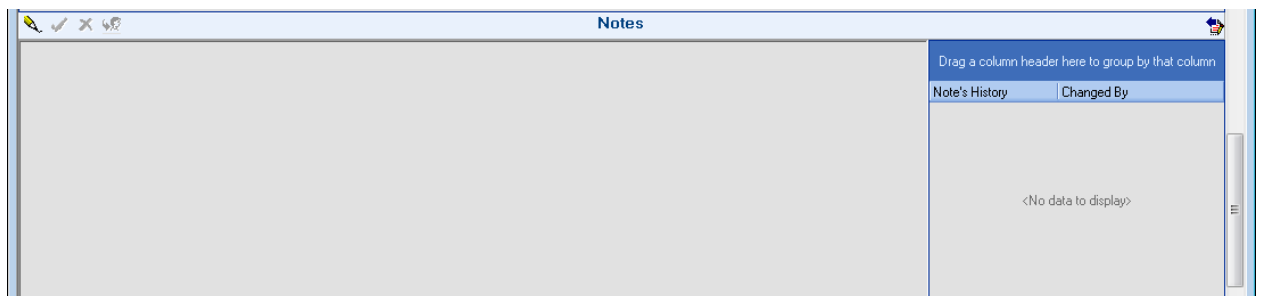vii. **Account Relationships** section – Enables link to customers and the ability to identify the type relationship.

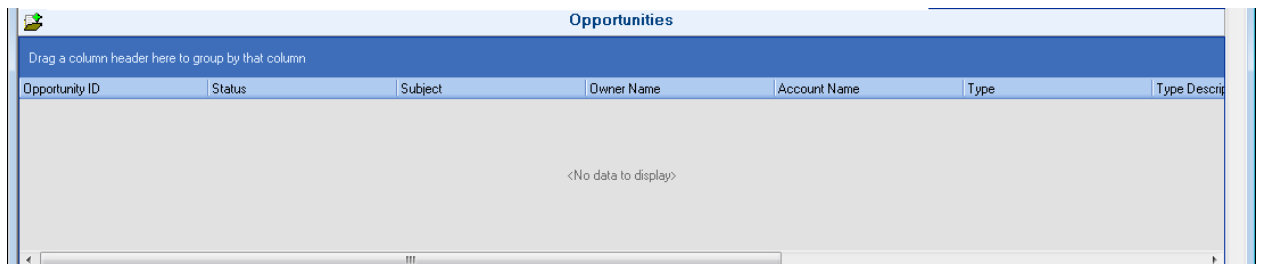viii.   **Contact Preferences** section – Enables recording interests and/or preferences of the contact.

ix.   **Notes** section – Enables general notes to be recorded about the contact; a change history of those notes is also included.

x.   **Opportunities** section - Displays all opportunities related to the selected contact.

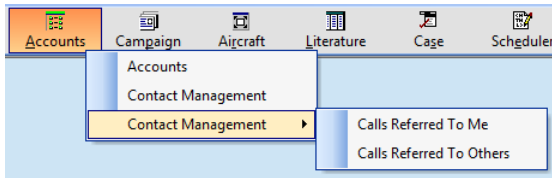xi.   **Call Tracking** section – Displays all calls related to the selected contact.
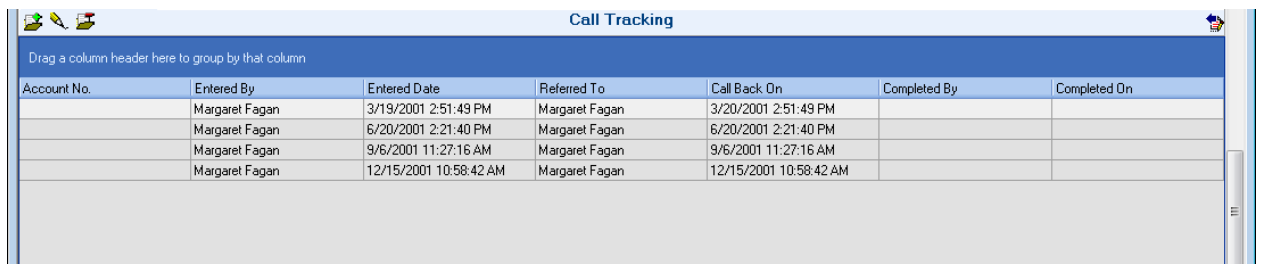
xii. **Emails** section – Displays emails related to the selected contact.
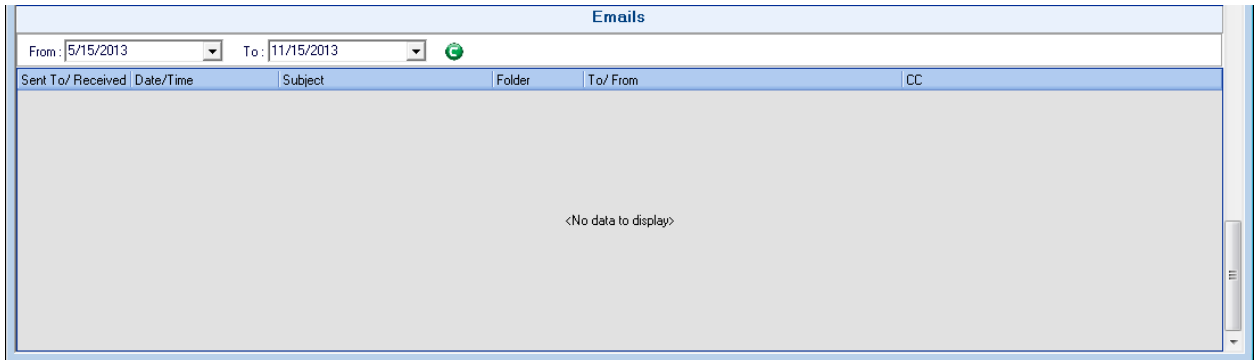
e. Call Tracking - From the CRM toolbar, left-click the **Accounts** button, select **Contact Management** (the one on the bottom) and left-click either **Calls Referred To Me** or **Calls Referred To Others**.
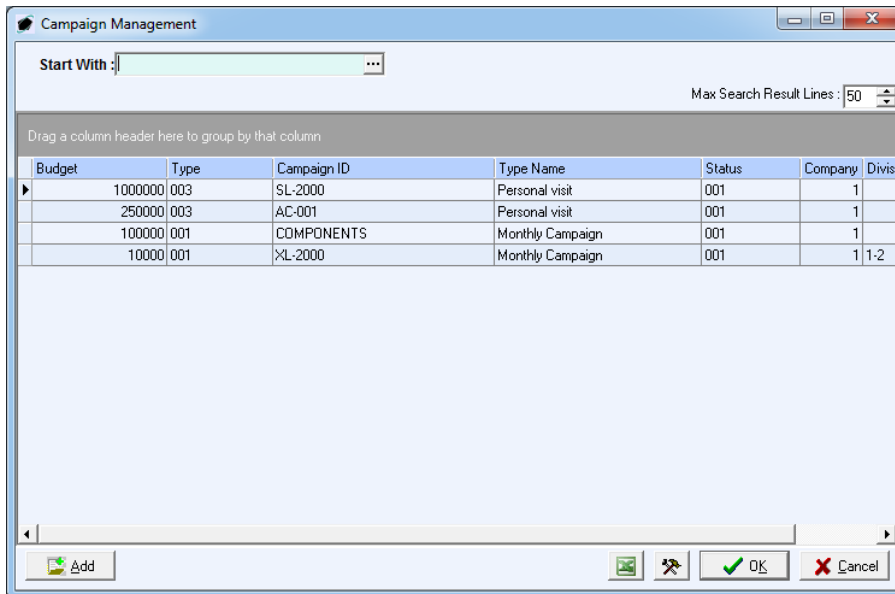

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6. Campaign Manager

Enables the management of sales campaigns (i.e. for the sale of a particular product or line of products, to increase customer base, to increase sales base to current customers), associated interactions (including opportunities, cases, literature and communication) and relationships (to accounts).

a. From the CRM toolbar, left-click the **Campaign** button and left-click **Campaign**.
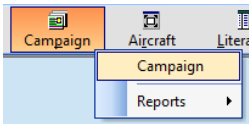
b. The **Campaign Management** search window will appear.

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.

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d. The **Campaign Management** window will appear.
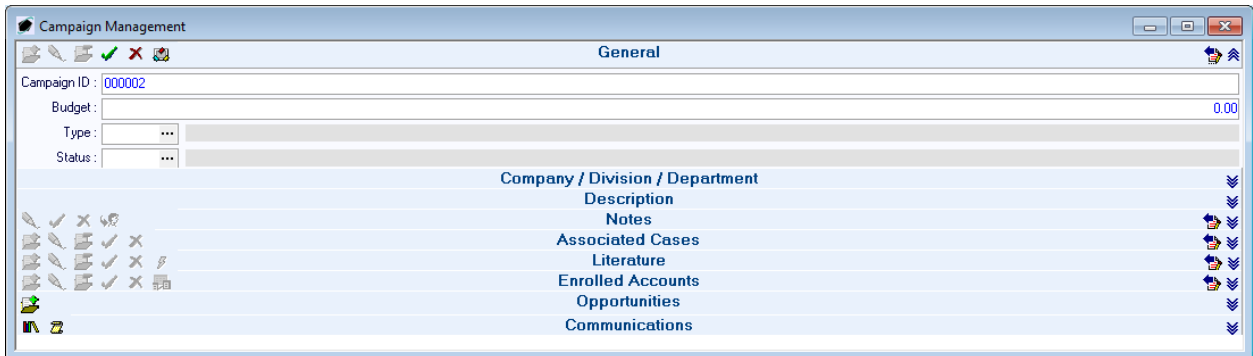
i. **General** section – Displays general information about the campaign.

ii. **Company / Division / Department** section – Enables identification of the company, division, and department with which the campaign is associated.
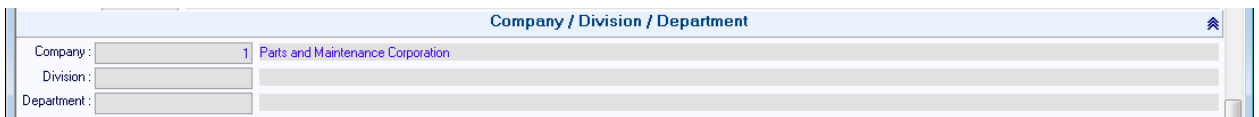
iii. **Description** section – Enables general information to be recorded about the nature of the campaign.
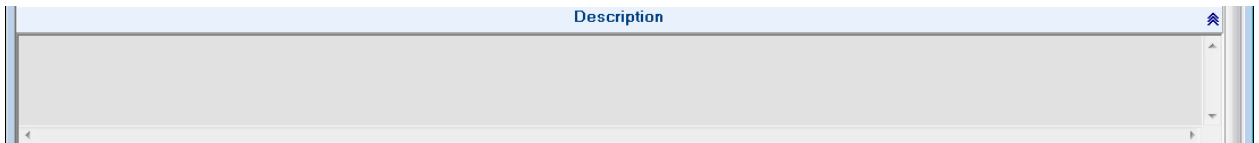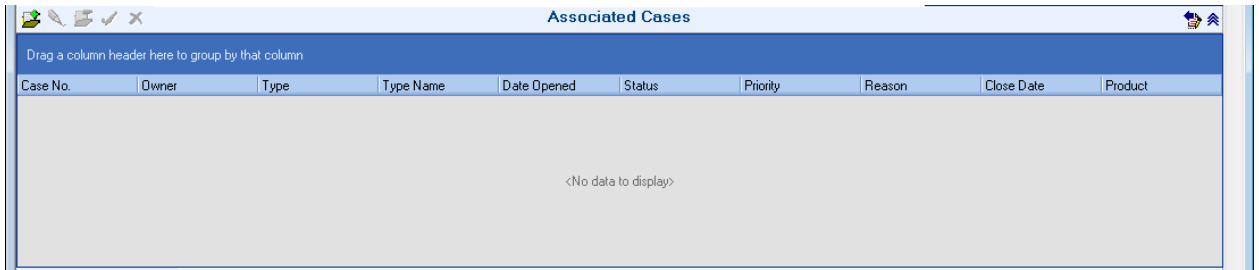
iv. **Notes** section – Enables general notes to be recorded about the campaign; a change history of those notes is also included.
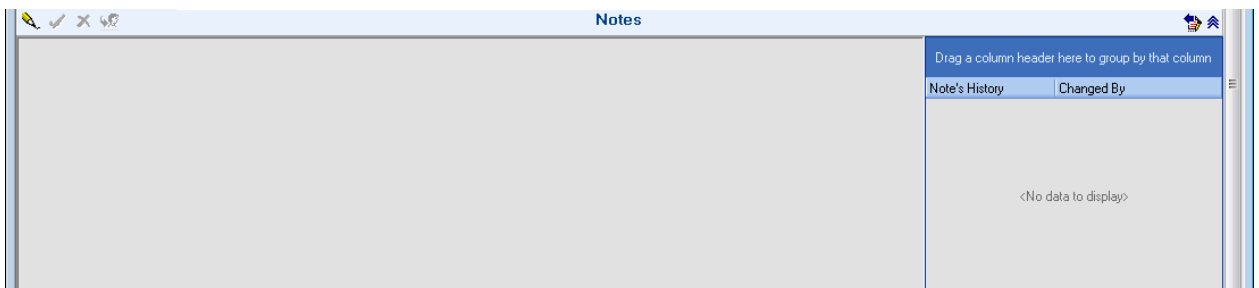
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v. **Associated Cases** section – Enables link to cases related to the campaign.

vi. **Literature** section – Enables link to literature related to the campaign.
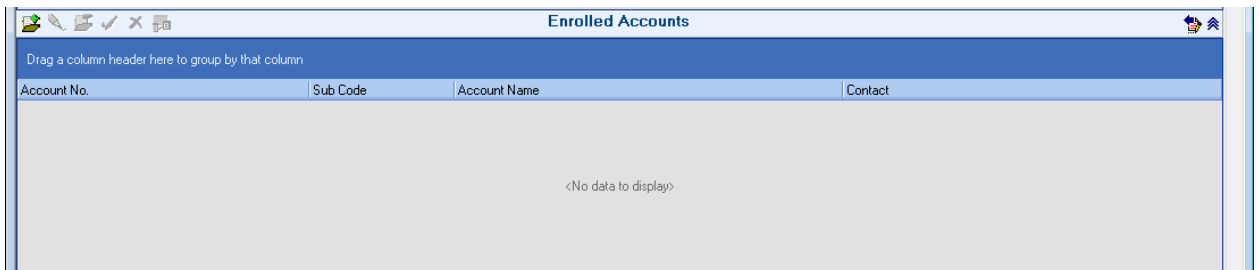
vii. **Enrolled Accounts** section – Enables link to customers targeted by the campaign.

viii. **Opportunities** section – Displays all opportunities related to the selected campaign.

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ix. **Communications** section – Displays all communications related to the selected campaign.
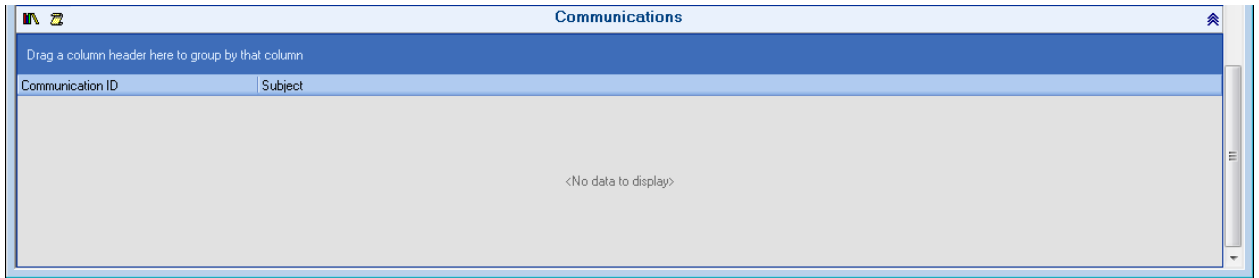
e. Reports - From the CRM toolbar, left-click the **Campaign** button and left-click **Reports**.
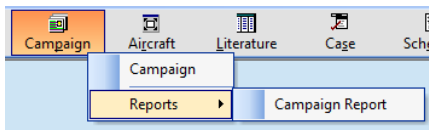
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7. Aircraft Manager

Enables the management of aircraft, associated interactions (including opportunities, cases, component work orders and maintenance work orders) and relationships (to accounts and contacts).

a. From the CRM toolbar, left-click the **Aircraft** button and left-click **Aircraft List**.
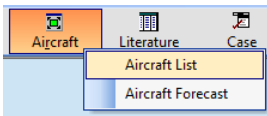
b. The **Aircraft** search window will appear.
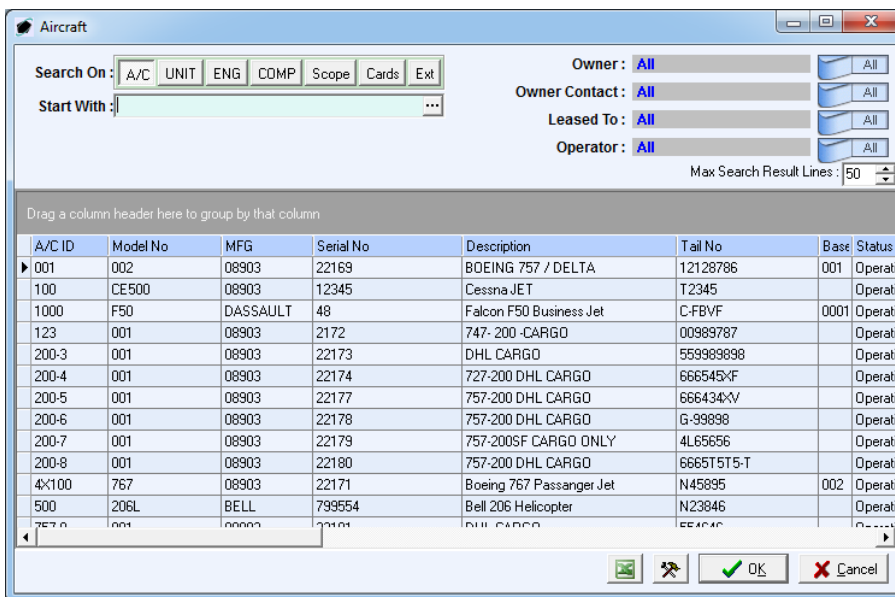
c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.

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d. The **Aircraft** window will appear.
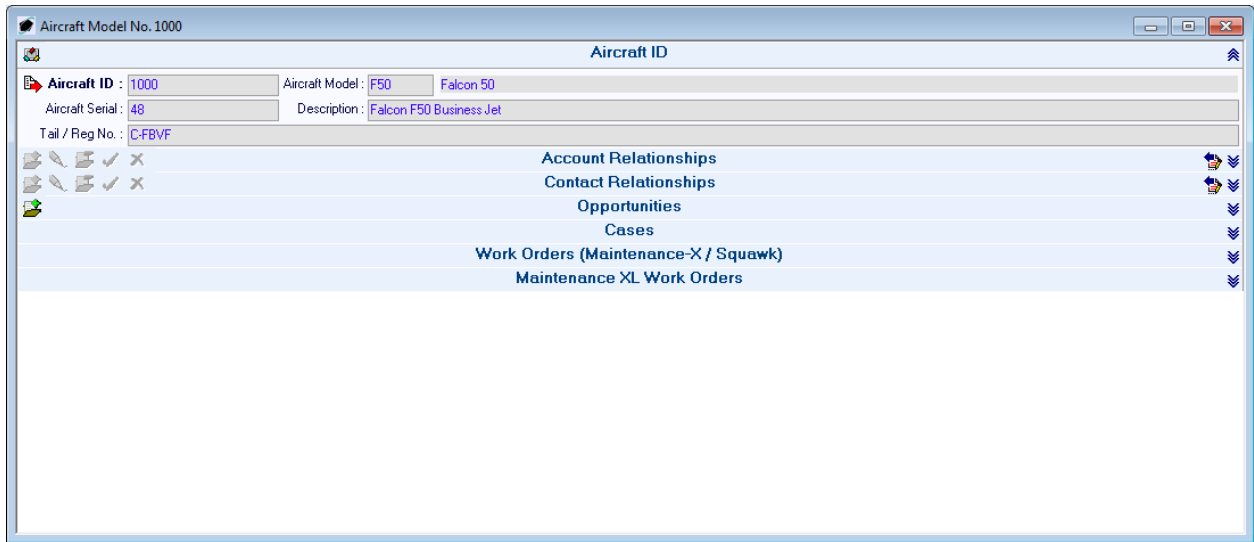
i. **Aircraft ID** section – Displays general information about the aircraft.

ii. **Account Relationships** section – Enables link to customers and the ability to identify the type relationship.
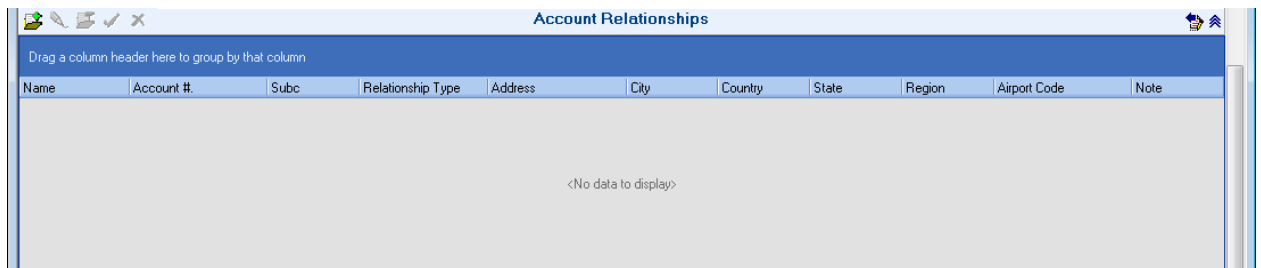
iii. **Contact Relationships** section – Enables link to contacts and the ability to identify the type relationship.
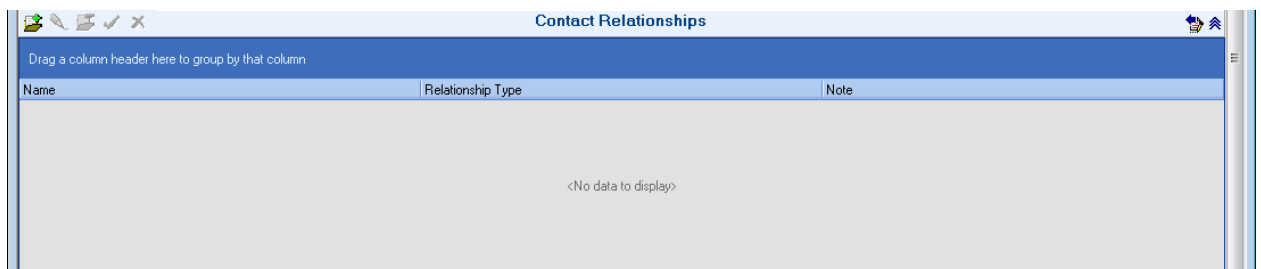
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iv. **Opportunities** section – Displays all opportunities related to the selected aircraft.

		Opportunities				✕
Drag a column header here to group by that column						
Opportunity ID	Status	Subject	Owner Name	Account Name	Type	Type Descrip

<No data to display>

v. **Cases** section – Displays all cases related to the aircraft.

			Cases					✕
Drag a column header here to group by that column								
Case No.	Owner	Type	Type Name	Date Opened	Status	Priority	Reason	Close Date	Product

<No data to display>

vi. **Work Orders (Maintenance-X / Squawk)** section – Displays all component work orders associated with the aircraft.

		Work Orders (Maintenance-X / Squawk)						✕
Drag a column header here to group by that column								
W/O No.	W/O Type	Part Number	Qty Ordered	W/O Status	Doc Status	Serial No	Ordered	Due

<No data to display>

vii. **Maintenance-XL Work Orders** section – Displays all maintenance work orders associated with the aircraft.

		Maintenance XL Work Orders							✕
Drag a column header here to group by that column									
WO Mnt No.	Doc Type	Description	Doc Status	Scope Code	Scope Name	WO Status	Planned Start	Planned Complete	
000159	Actual	A Check	Open	A	A CHECK		Jan-12-2009	Feb-13-2009	

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8. Aircraft Forecast

Enables forecasting of scopes having a particular scope code(s) that are assigned to aircraft of a particular model(s).

a. From the CRM toolbar, left-click the **Aircraft** button and left-click **Aircraft Forecast**.

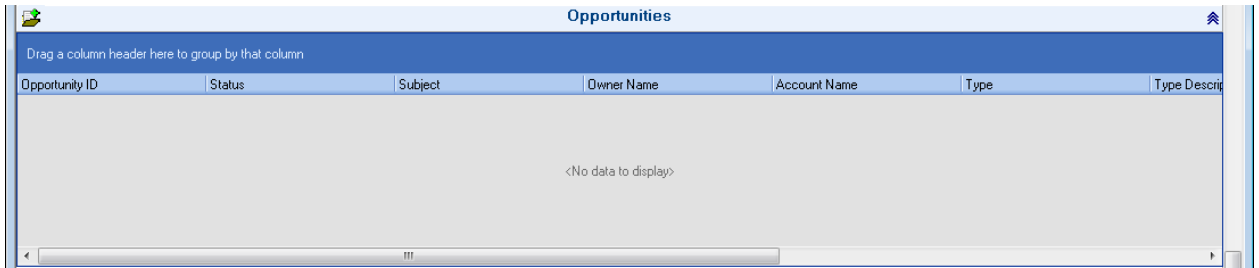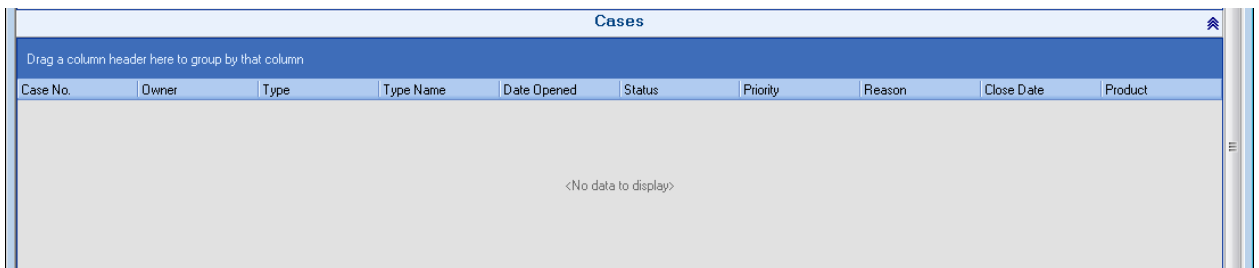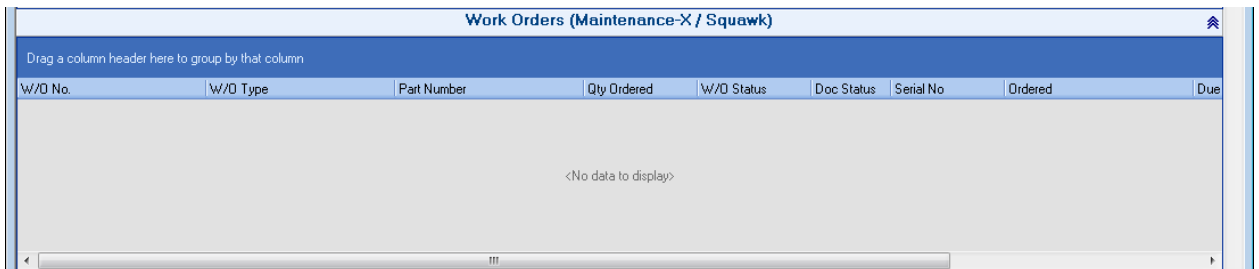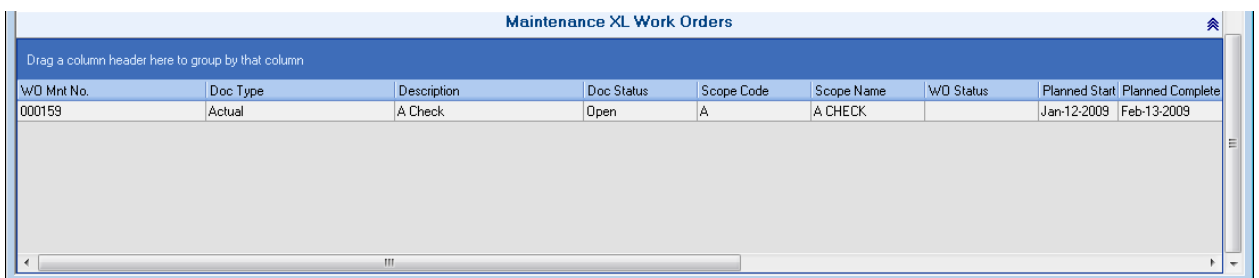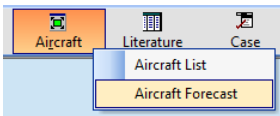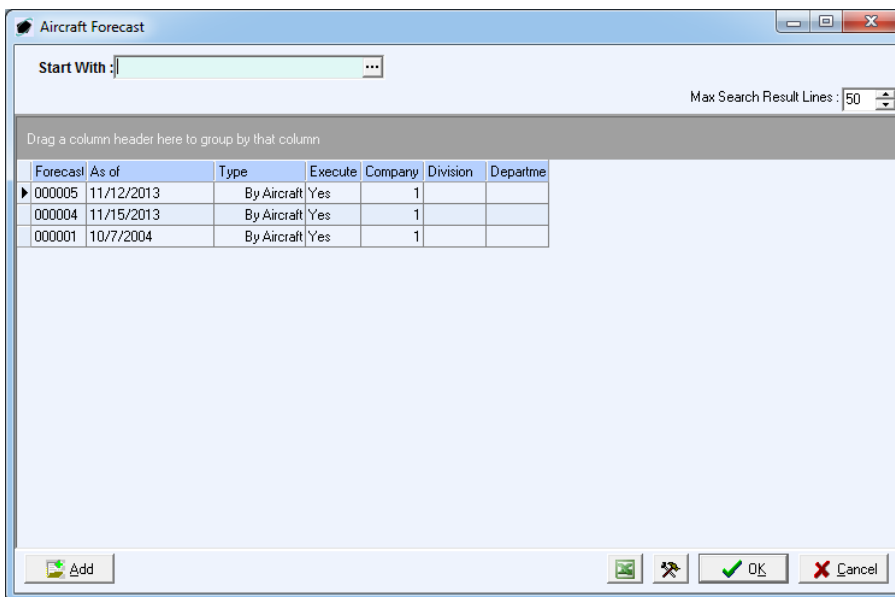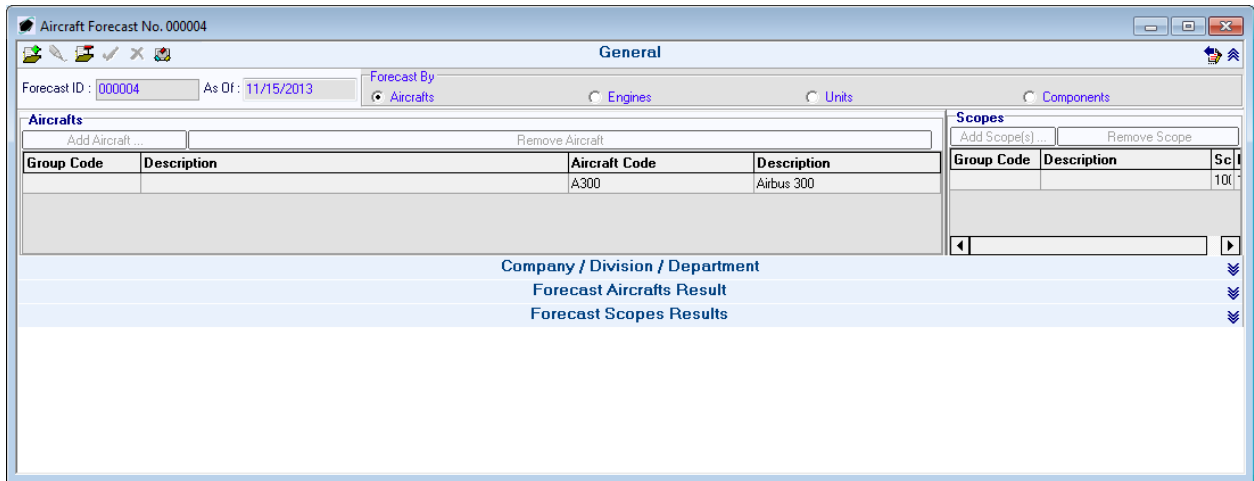

b. The **Aircraft Forecast** search window will appear.

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.
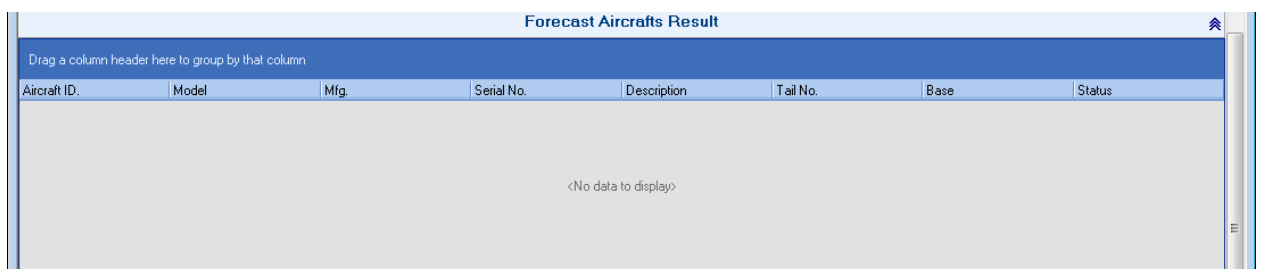
CONTINUE TO NEXT PAGE

d.   The **Aircraft Forecast** window will appear.

i.   **General** section – Enables setup of the forecast by choosing the type of forecast and applicable aircraft models and/or scope codes.

ii.   **Company / Division / Department** section – Enables identification of the company, division, and department with which the aircraft is associated.
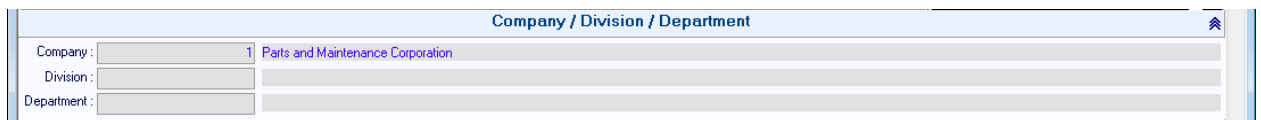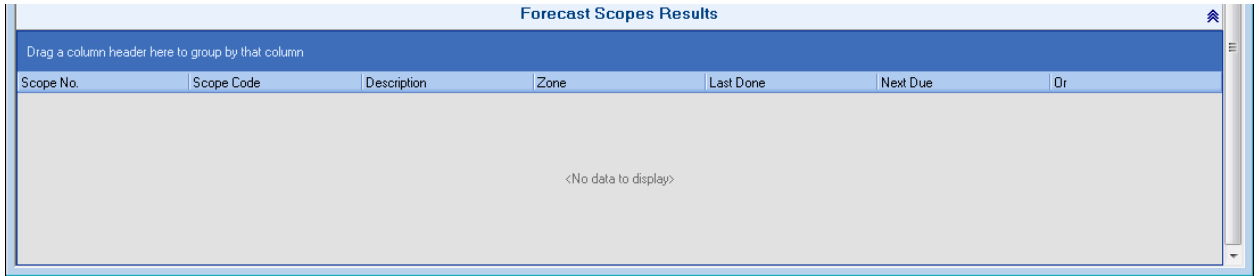

iii.   **Forecast Aircrafts Results** section – Displays all aircraft for which the forecast applies and applicable maintenance is due as of the forecast date.

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iv. **Forecast Scopes Results** section – Displays all scopes due meeting the forecast criteria and for the aircraft selected in the **Forecast Aircrafts Results** section.
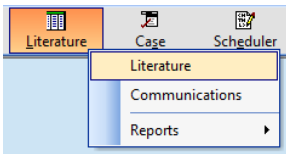
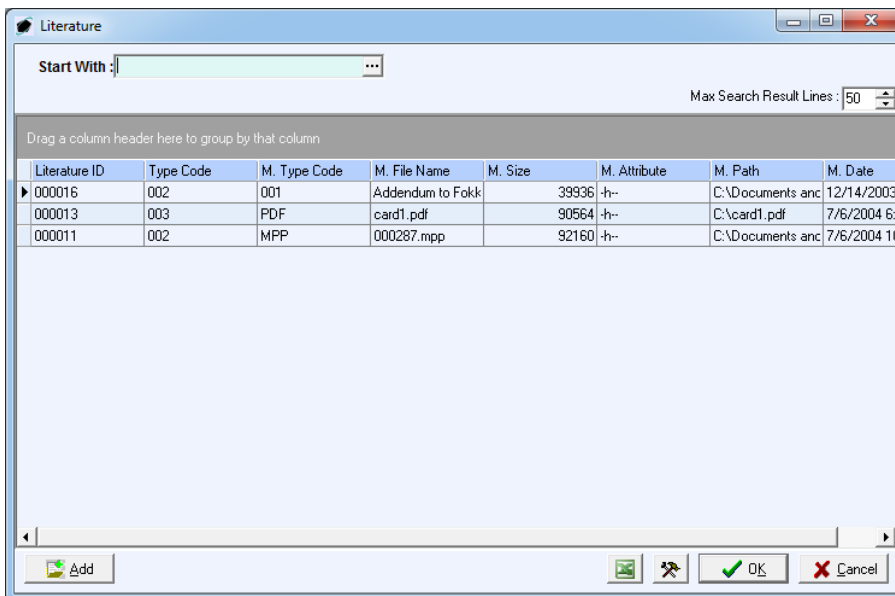| Scope No.	Scope Code	Description	Zone	Last Done	Next Due	Or

<No data to display>

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9. Literature Manager

Enables the management of literature items developed for sales purposes and associated interactions (communications).

a. From the CRM toolbar, left-click the **Literature** button and left-click **Literature**.

b. The **Literature** search window will appear.

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.
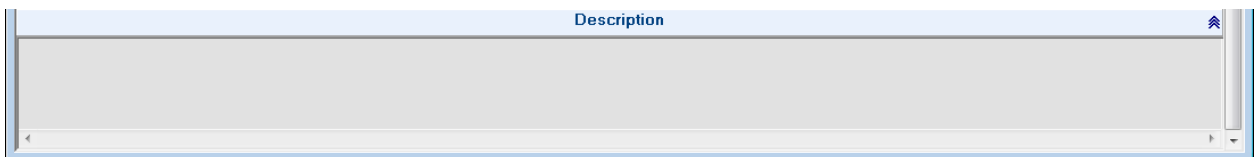
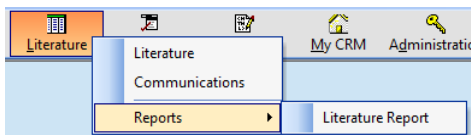*CONTINUE TO NEXT PAGE*

d. The **Literature** window will appear.
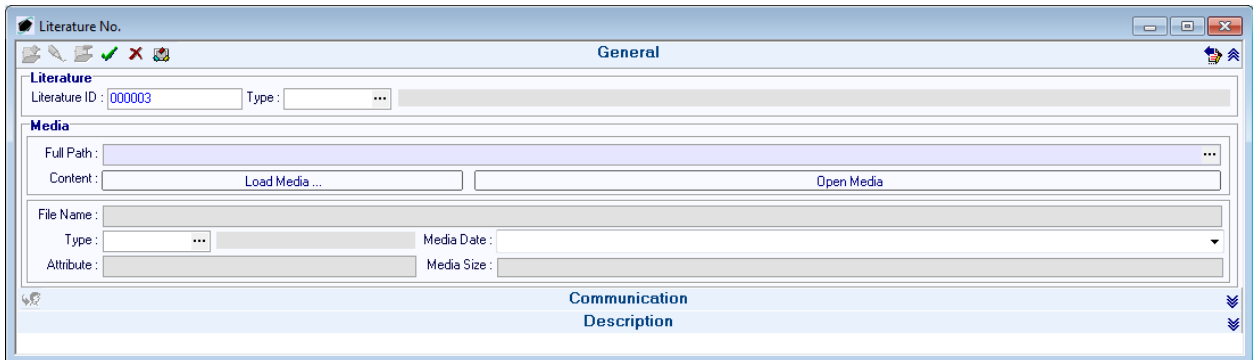
i. **General** section - Displays general information about the literature item.

ii. **Communications** section – Displays all communications related to the literature item.

iii. **Description** section – Enables general information to be recorded about the literature item.

e. Reports - From the CRM toolbar, left-click the **Literature** button and left-click **Reports**.
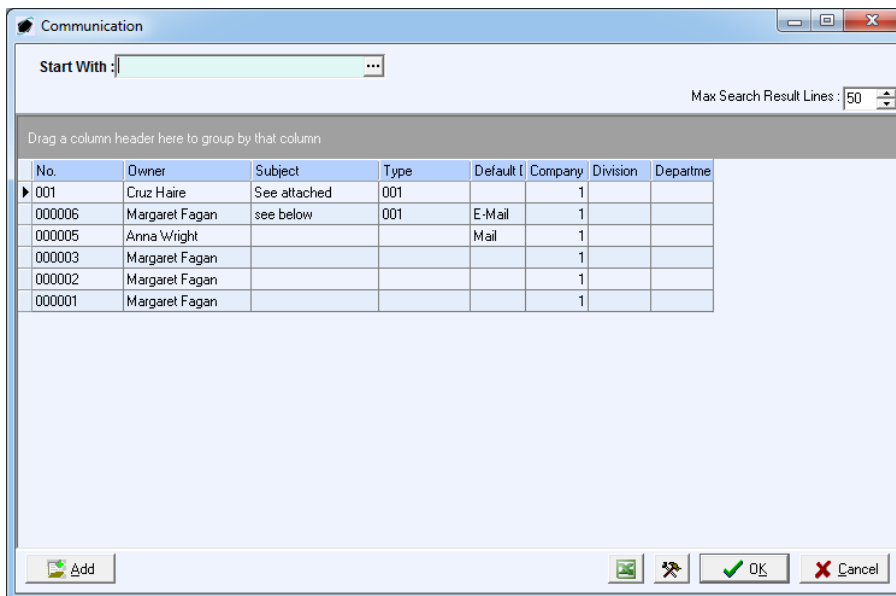

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10. Communication Manager

Enables the management of communication developed for sales purposes, associated interactions (literature) and the delivery of the communications.

a. From the CRM toolbar, left-click the **Literature** button and left-click **Communications**.
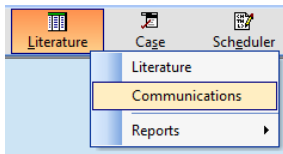

b. The **Communication** search window will appear.

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.
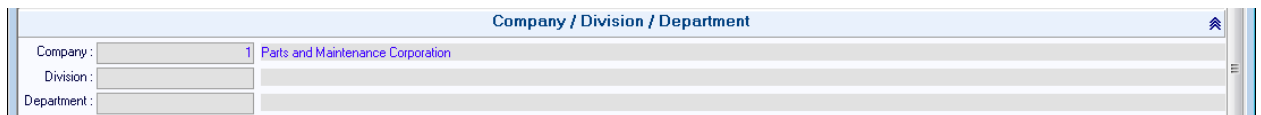
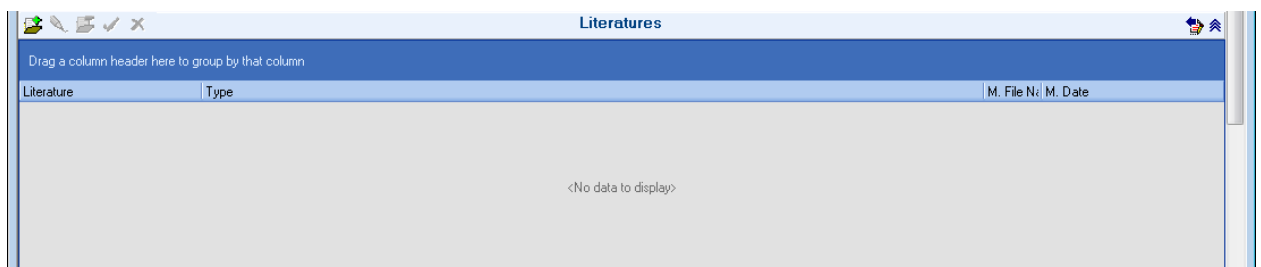*CONTINUE TO NEXT PAGE*

d. The **Literature** window will appear.

i. **General** section - Displays general information about the communication.

ii. **Message** section – Displays the message that will accompany the communication.
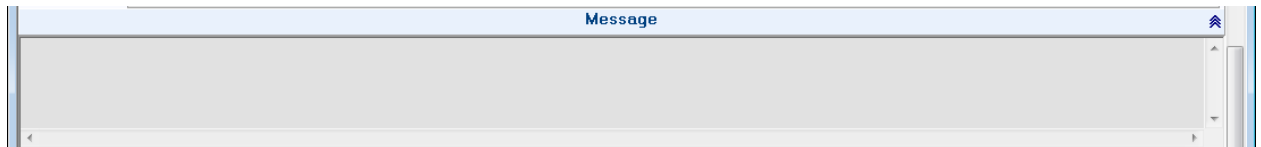
iii. **Company / Division / Department** section – Enables identification of the company, division, and department with which the communication is associated.
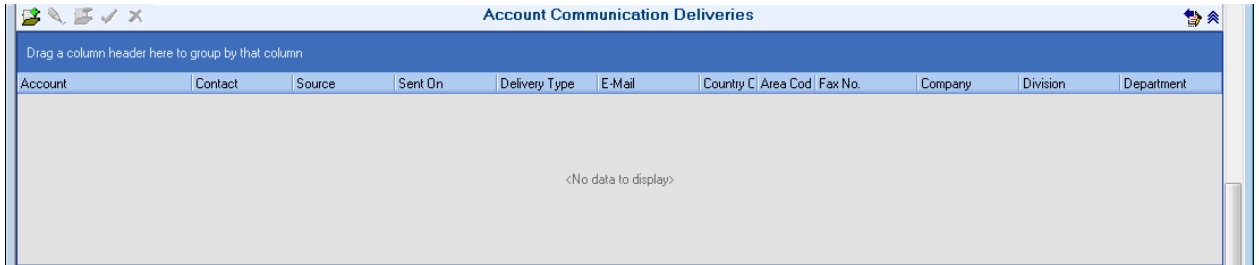

iv. **Literatures** section – Displays all literature items related to the communication.

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v. **Account Communication Deliveries** section – Displays information related to delivery of this communication to customers.

vi. **Contact Relationships** section – Displays information related to delivery of this communication to contacts.
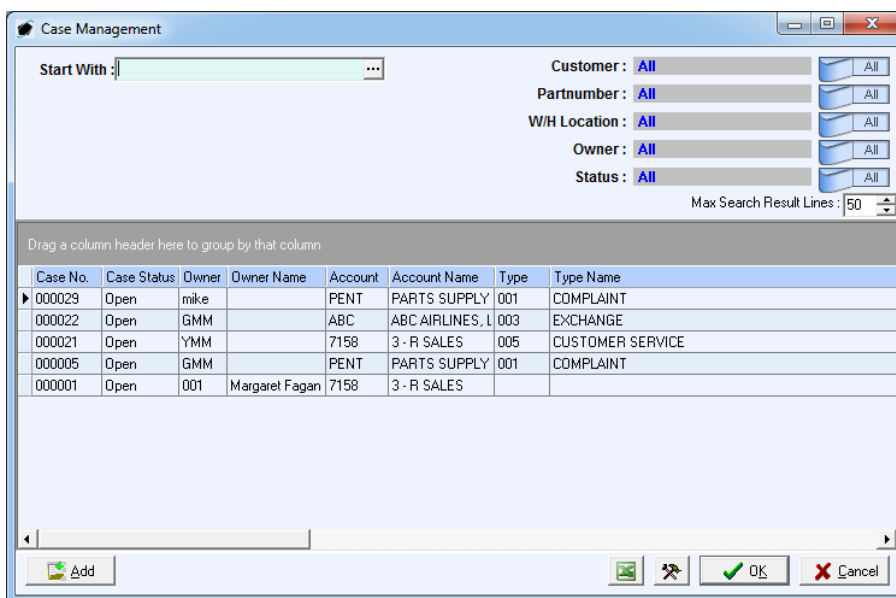

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11. Case Manager

Enables the management of customer issues, related information (including account and contact information and open activities) and associated interactions (including literature, communication and emails).

a. From the CRM toolbar, left-click the **Case** button and left-click **Case Management**.
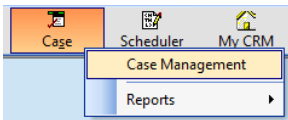
b. The **Case Management** search window will appear.

c. Open an existing record (left-click the line within the search window and left-click OK; or double-click the line within the search window) or left-click the **Add** button to create a new record.
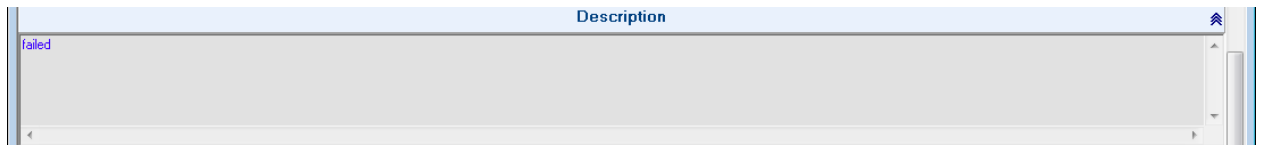
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d. The **Case Management** window will appear.
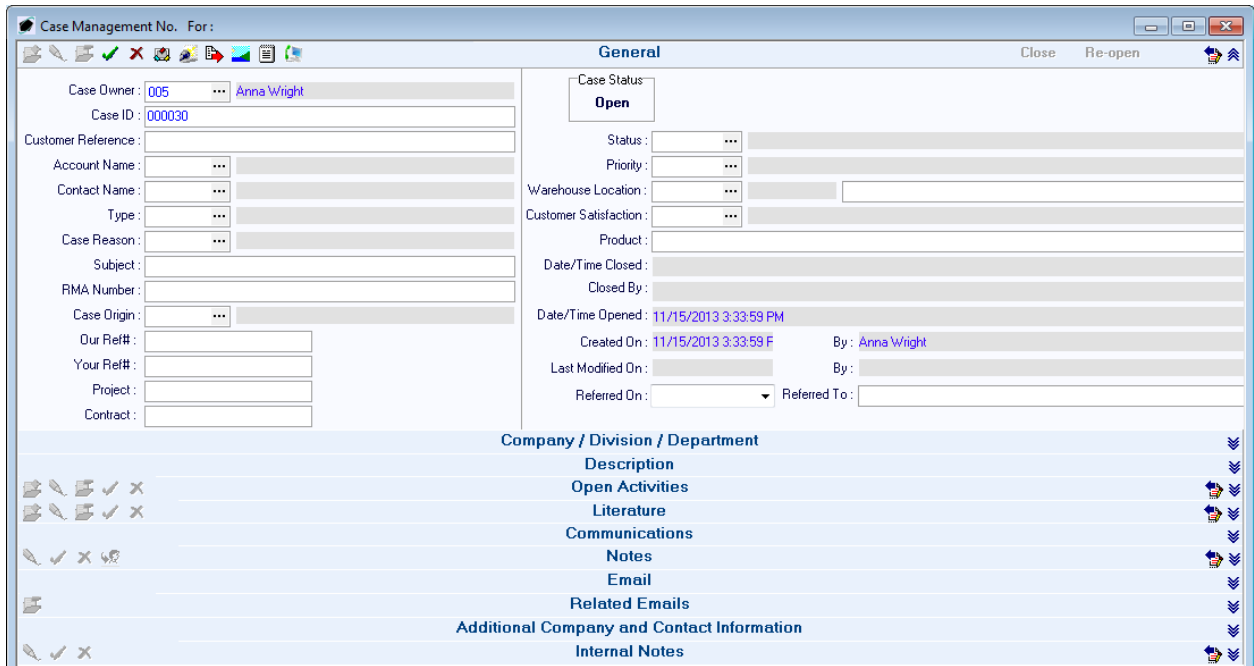
i. General section – Displays general information about the case.

ii. **Company / Division / Department** section – Enables identification of the company, division, and department with which the case is associated.
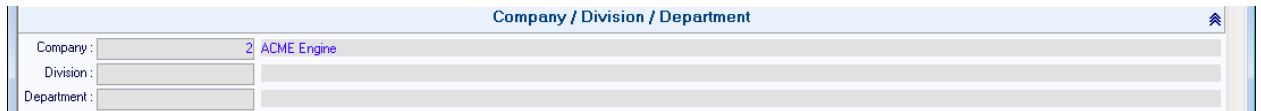
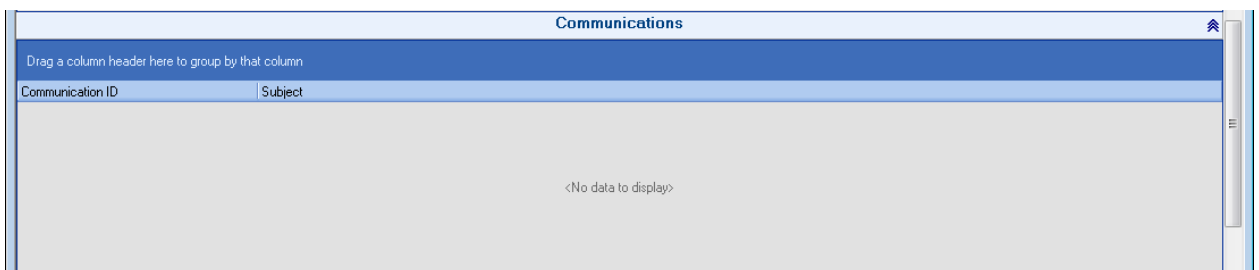iii. **Description** section – Enables general information to be recorded about the case.

iv. **Open Activities** section – Enables recording of pending activities related to the case.
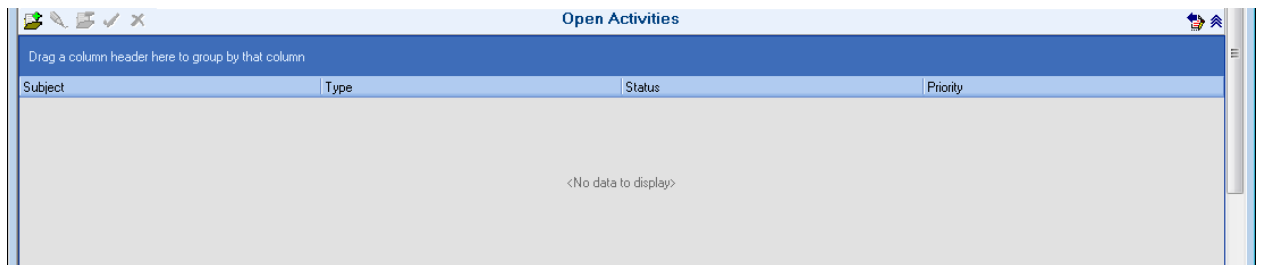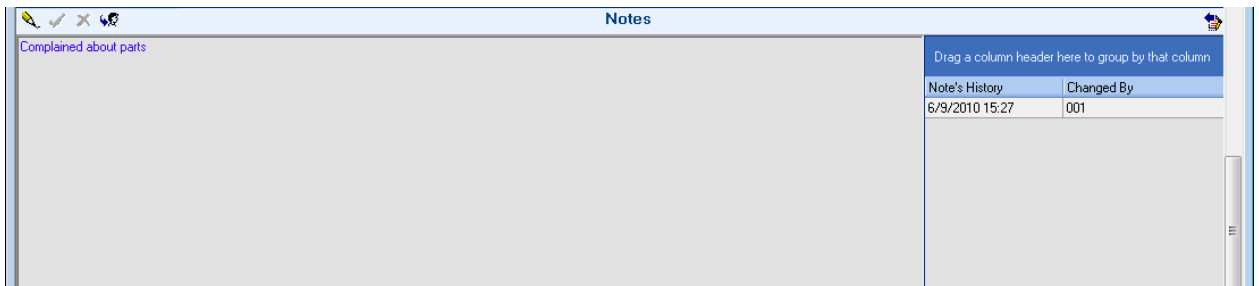
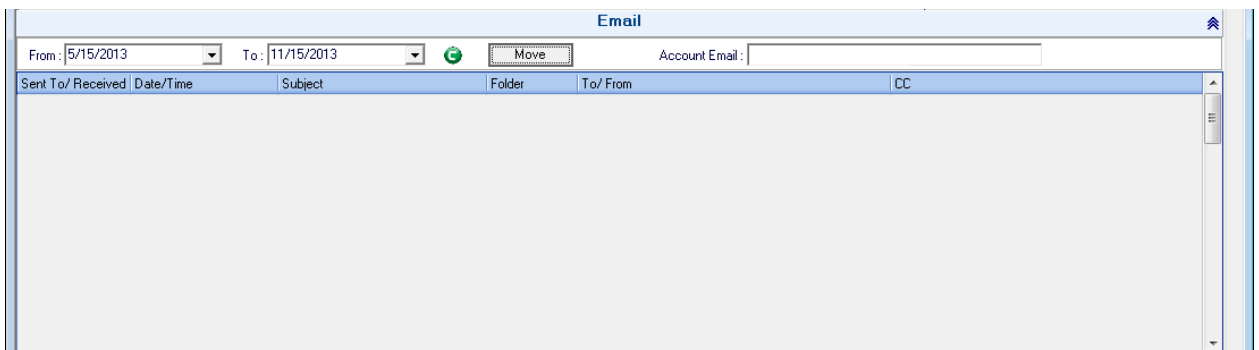v. **Literature** section – Displays all literature items related to the case.

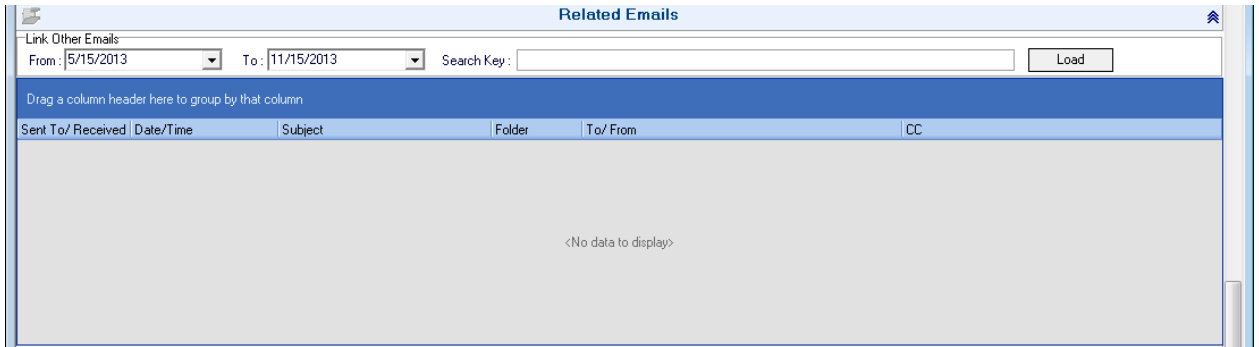vi. **Communications** section – Displays all communications related to the case.

vii. **Notes** section – Enables general notes to be recorded about the case; a change history of those notes is also included.
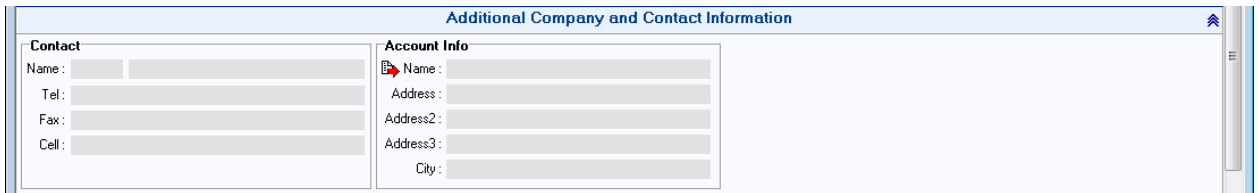

viii. **Emails** section – Displays emails related to the case.

ix. **Related Emails** section – Displays emails related to the case.

x. **Additional Company and Contact Information** section – Displays information related to the customer account and contact identified in the general section of the case.

xi. **Internal Notes** section – Enables general notes to be recorded about the case; a change history of those notes is also included. These notes are not printed on the case report.
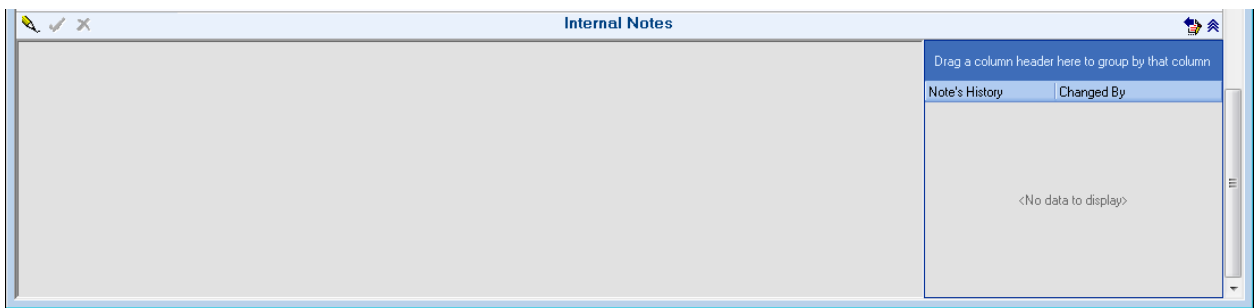
e. Reports - From the CRM toolbar, left-click the **Case** button and left-click **Reports**.
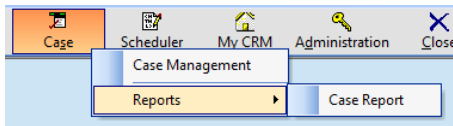
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12. Scheduler

Enables the management of your schedule and employed resources.

a. From the CRM toolbar, left-click the **Scheduler** button and left-click **My Scheduler**.
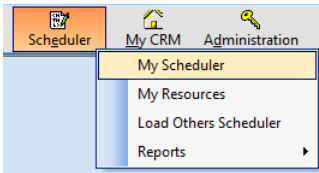

b. The **Scheduler** window will appear. Events may be added and may be assigned to resources.

c. Loading other users schedulers – From the CRM toolbar, left-click the **Scheduler** button and left-click **Load Others Scheduler**

d. Reports - From the CRM toolbar, left-click the **Scheduler** button and left-click **Reports**.

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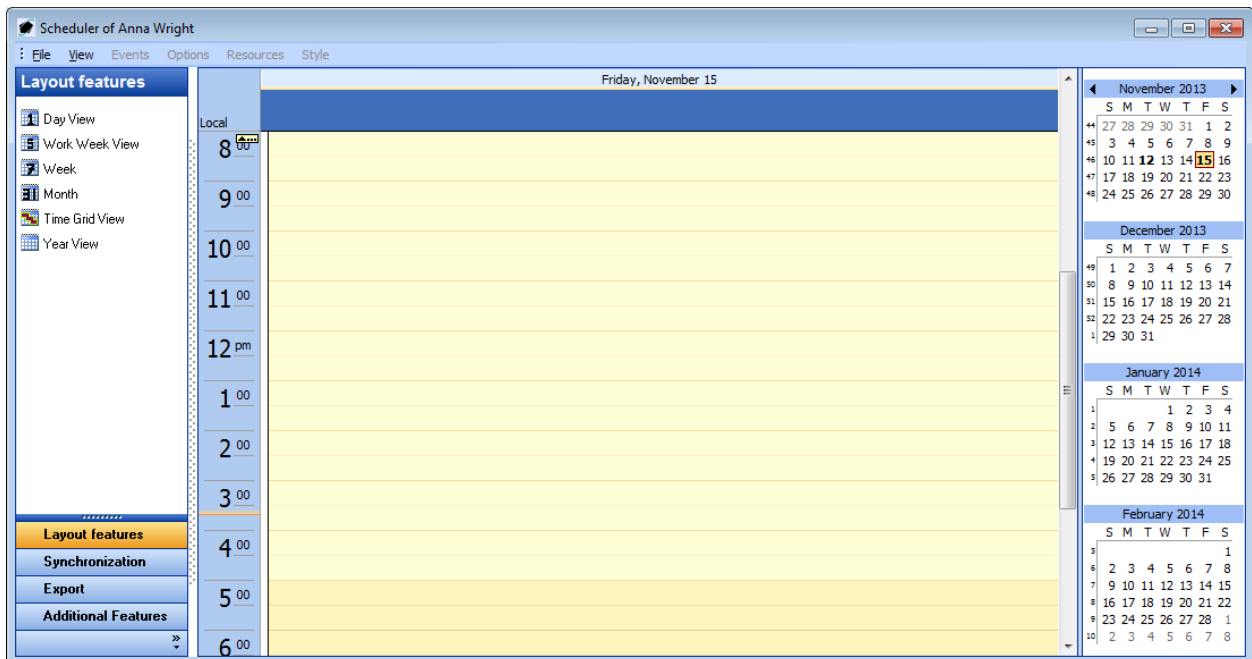## 13. My CRM

Enables the user the ability to easily access documents that are directly related to the user.
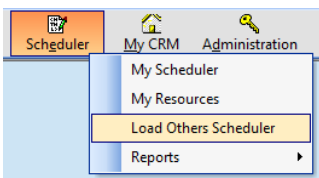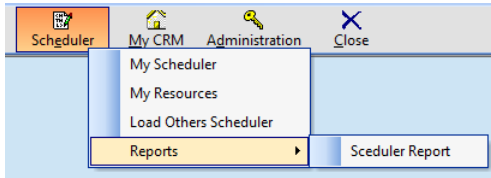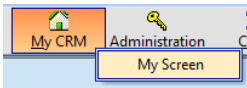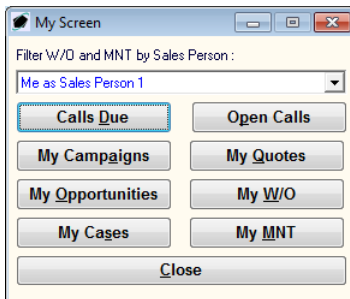
a. From the CRM toolbar, left-click the **My CRM** button and left-click **My Screen**.

b. The **My Screen** window will appear.

    i. **Filter W/O and MNT by Sales Person** field – Identifies the field within component and maintenance work orders that the user should be identified in order for the WO or MNT to appear in the search window when the **My W/O** or **My MNT** buttons are selected.

    ii. **Calls Due** button – Left-click to view the calls that have been referred to the user.

    iii. **Open Calls** button – Left-click to view the calls that were created by the user.

    iv. **My Campaigns** button – Left-click to view campaigns created by the user.

    v. **My Opportunities** button – Left-click to view opportunities where the user is identified as owner.

    vi. **My Cases** button– Left-click to view cases where the user is identified as owner.

    vii. **My Quotes** button – Left-click to view sales quotes prepared by the user.

    viii. **My W/O** button – Left-click to view component work orders where the user is identified as the sales person identified in the **Filter W/O and MNT by Sales Person** field.

    ix. **My MNT** button – Left-click to view maintenance work orders where the user is identified as the sales person identified in the **Filter W/O and MNT by Sales Person** field.

END OF DOCUMENT