

Exact Synergy Enterprise

User Guide

Customers

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1. INTRODUCTION

After installing Exact Synergy Enterprise as instructed in the Exact Synergy Enterprise **Implementation Manual**, the next step is to implement other functionalities offered by the software that caters to your business needs.

The objective of this manual is to help you implement the customer relationship management (CRM) applications which are available in the **Customers** module. As the implementation instructions are presented in easy and quick steps, this manual is meant for consultants as well as end-users. In general, the manual is created with the primary focus of helping everyone including users with minimal CRM knowledge to implement the CRM solution and subsequently run the processes involved.

Each chapter starts with a brief introduction explaining the objectives of the chapter.

Should you require more information about the applications, you can click  **Help** at the title bar to view the online help documents in Exact Synergy Enterprise.

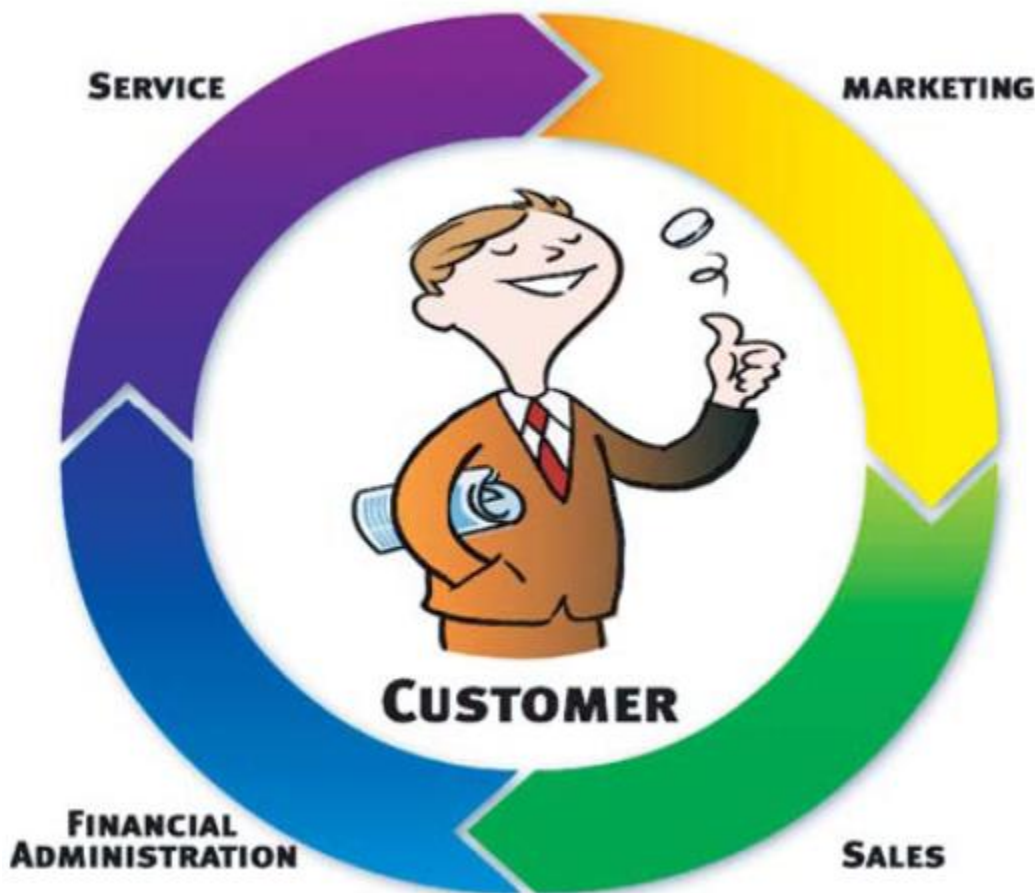
We are confident that this manual will help your company get started with Exact Synergy Enterprise and we believe your organization will benefit from the product very quickly.

2. WHAT IS CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Customer Relationship Management (CRM) is a business strategy that will put the customer at the heart of your organization's processes, activities, and culture. Software is an important supportive tool for that CRM strategy.

As an integrated part of the Exact Synergy Enterprise business suite, the **Customers** solution from Exact Synergy Enterprise empowers business users to monitor, understand, manage, and maximize sales performance, and leverage customer information into long-term customer loyalty and retention. These are achieved by seamlessly integrating customer data across the organization into one database for increased productivity, improved communications and technology-related savings.

The first point that needs to be addressed is the fact that CRM is a strategy that must be embraced by all employees and departments within your organization. It is not enough to let your sales and marketing people implement CRM while your service personnel do not. CRM can best be explained with the following image:



Exact Synergy Enterprise **Customers** serves as the foundation for campaign management, sales force automation and service and support management, providing the best solution for Small and Medium Business (SMB) organizations in the areas of customer lifecycle marketing, multi-channel selling, and service management.

To reflect this, the manual is divided into the following sections:

- Centralized customer information
- Marketing automation
- Sales automation
- Support management.

In the image, you can see that the customer is at the heart of your business' main processes. Furthermore, the first activity of a sales cycle should be marketing. Via marketing, you inform existing and potential customers of the products and services that you offer.

Your sales team will then follow up on the basis laid by your marketing campaigns. They need to create business to make up for all the effort in marketing activities that helps to promote your brand, products, and services. This is done by pursuing opportunities arising from the marketing campaigns.

Finally, after the deals are successful, the support and service department will handle any questions or complaints from your customers. These activities will generate a lot of information about your customers that you can then use to start new marketing activities.

To support the above activities, the following key features are available in Exact Synergy Enterprise:

- Account card — All the information, communication, and activities with customers, partners, vendors, associates and prospects are linked and can be accessed through the account card.
- Easy and efficient accounts entry — The **Accounts Import Wizard** allows you to import Microsoft Excel (or another application's) files saved in comma separated value (CSV) format into the database and an accounts batch entry page allows you to quickly enter multiple accounts using a matrix entry grid.
- Segmentation and tracking of accounts origin — The accounts can be categorized into various categories to enable a detailed analysis through flexible reporting. The method of account acquisition can be recorded for analysis of effectiveness of marketing campaigns.
- Deduplication tool — It is important to maintain a clean database to ensure that the information of all accounts is accurate. The deduplication tool allows you to find and merge duplicate accounts automatically, based on user-defined settings. This leads to better management of your accounts.
- Sales cycle management — Setting up your sales processes into templates allows you to manage your sales processes by classifying them into predefined sales stages. This allows you to manage all your sales activities from the moment of first contact until the moment the customer signs the contract. Sales process templates assure you that all required activities are performed to give you the best chance of winning the deal. This results in better streamlining of all sales processes, and thus, never forgetting a sales lead and in the end, resulting in an increase of revenue.
- Opportunity card — The opportunity card captures important information of accounts, such as products interested in, size of the business deal, key decision makers, expected closing date, competitors, sales team members and other relevant information. You are allowed to customize the opportunity card to ensure only the appropriate details are captured or viewed.
- Integrated portal — Built-in web portals provide ongoing and active communications with all customers, partners and vendors. Secure private logins allow for one-to-one client interactions.
- Dashboard reports — The advanced dashboard reporting functionality identifies and visualizes bottlenecks, captures diagnostic data, and provides real-time views of multi-channel customer activities.
- Customer service and support — Servicing and supporting customers by managing their enquiries and feedback through requests will enhance business relationships. The customers are able to monitor the statuses of these requests. In addition, they can search for information, such as best practices and Frequently Asked Questions (FAQ) from the knowledge base. Reports generated from customer support requests can be used to analyze various performance levels, including average service response time, customers or products with the most enquiries, outstanding requests and others. Analyzing these elements can help to improve overall service quality.

The **Customers** module within Exact Synergy Enterprise provides end-users with an easy-to-use integrated system to leverage their marketing, sales, and service support activities. The end-to-end insight into an entire customer lifecycle empowers the right decision-making to grow the business.

3. ACCOUNTS MANAGEMENT

The first step in implementing Exact Synergy Enterprise as the support tool for your customer relationship management strategy is making sure that all information you have about your accounts is entered into the system. This information will be the basis for all your sales and marketing activities and therefore great attention must be given to this part of the implementation.

This section will describe how an account is created in Exact Synergy Enterprise and also how existing accounts from a Microsoft Excel sheet are uploaded. You will learn how to use free fields that can be customized for capturing information about your accounts that are specific to your company's needs. In addition, you will also learn how to create contact persons for your accounts. Finally, this section will show you how you can organize your accounts using the various marketing variables which enable you to classify and target specific groups of accounts in reports.

Entering information for all new accounts in the system might be overwhelming initially, but you will soon realize the benefits of capturing information for your accounts management. For example, you will be able to target accounts with information that is specific to them, send invoices to the correct addresses, and save all correspondence under one account so it can be easily retrieved in future.

Business benefits:

- Provides a single source of data that is convenient for you to create, update, and track information related to your accounts.
- Provides powerful tools that can be used for the analysis of marketing data, and generating sales and marketing reports.
- Enables you to easily manage your business sales cycle and provides you with the ability to track and update your sales and marketing workflow.
- Provides data security by authorizing and limiting access to the relevant individuals based on the user roles, system rights, and security settings of the application.
- Provides the flexibility of customizing the presentation and information available for specific business requirements.
- Allows you to save time and effort on accounts management by providing several methods of entering and updating accounts information.
- Allows you to easily maintain the integrity of your accounts information.

3.1 ORGANIZING ACCOUNTS AND CONTACTS

It is preferable to classify your accounts into different groups based on their core business before entering your accounts, adding information in the free fields, and adding extra contacts. This will help you target them with information that is specific to their activities and determine whether you have the products or services that can provide solutions to their problems. It also allows you to organize your sales personnel into groups that target specific areas of your product market.

Classifications can be done based on the size of the company or the business sector that the organization belongs to. Classifications make it easier to view information that is needed for the marketing personnel to formulate marketing strategies that target specific markets and for sales personnel to set their sales targets and measure their sales performance.

Before you can classify your leads and customers, you need to set up the variables that you can use. In Exact Synergy Enterprise, there are five classification variables available for your accounts:

- Classifications
- Sources
- Sectors
- Subsectors
- Sizes
- Ratings

3.1.1 Accounts master data

Classifications

Classifications can be used to determine the different customer portals that customers can access to. Therefore, it is necessary to set up a suitable classification that can be used to control customer access to the correct customer portal so that the right information can be made available to the right people.

You can define the classifications based on the size of your accounts, for instance from small enterprises to multi-national corporations. You can also choose to classify your accounts based on functional areas, such as retail, services, distribution, or manufacturing.

To create classifications, function right **319 — Maintain classifications** is required. Users with the **Customer manager** role have this function right.

To create classifications:

1. Go to Modules → Marketing → Setup → General → Classifications, and click **New**. You will see the following page:

2. Under the **Classifications** section, type a unique ID and a suitable description at **ID** and **Description** respectively to identify the classification.
3. At **Type**, select the type of the new classification. The type of classification can be used to indicate the type of account that is allowed to use the classification. For example, if you select **Customer** at **Type**, this classification can only be linked when the account type is **Customer**.
4. Next, type a number for the order of the classification within the list of classifications at **Order**. This is useful if you want to list the classifications in the order of importance.
5. Select a policy for the classification at **Policy**.
6. Click **Save** to save the new classification, which will be displayed in the list of available classifications.
7. Click **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

Sources

Another property that can be defined for your accounts is their source. This property indicates how the account was found or where the account originated from. You can use this information to come up with ways to create more accounts and determine more effective communication methods to win over potential customers. Like classifications, sources can be created and modified.

To create sources, function right **604 — Maintain opportunity master data** is required. Users with the **General manager**, **Customer manager**, and **Marketing manager** roles have this function right.

To create sources:

1. Go to Modules → Marketing → Setup → General → Sources, and click New. You will see the following page:

2. Under the **Source** section, type a unique code and a suitable description for the new source at **Code** and **Description** respectively.
3. Click **Save** to save the new source, which will be displayed in the list of available sources.
4. Click **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

Sectors

Another way of classifying your accounts is by sectors. With sectors, you can indicate what the core activity of an account is. This may help you send out information that is specific to the core activity of a group of accounts and improve your chances of expanding your business opportunities.

Like all other entities discussed in this section, sectors must be defined before they are used. When defining the sectors, keep in mind that like classifications, sectors can also be used to determine the access by customers to specific customer portals.

To create sectors, function right **305 — Maintain sectors and subsectors** is required. Users with the **Customer manager** role have this function right.

To create sectors:

1. Go to Modules → Marketing → Setup → General → Sectors, and click **New**. You will see the following page:

2. Under the **Sector** section, type a unique code and a suitable description for the new sector at **Code** and **Description** respectively. Select a policy for your sector at **Policy**.
3. Click **Save** to save the new sector, which will be displayed in the list of available sectors, and then click **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

Subsectors

To extend the segmentation based on the sector an account operates in, you can also define subsectors for each individual sector. This allows you to target an even more specific group of customers within a specific sector, with information that is tailor-made for them.

To create subsectors, function right **305 — Maintain sectors and subsectors** is required. Users with the **Customer manager** role have this function right.

To create subsectors:

1. Go to Modules → Marketing → Setup → General → Subsectors, and click New. You will see the following page:

2. Under the **Subsector** section, by default, the first sector in a list of available sectors will be selected at **Sector**. You can type or select a sector that will be the general categorization of the subsector that you want to create.
3. Type a unique code and a suitable description for the new subsector at **Code** and **Description** respectively.
4. Select a policy for your subsector at **Policy**.
5. Click **Save** to save the new subsector, which will be displayed in the list of available subsectors.
6. Click **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

Sizes

Another variable that you can use to segment your customers is their size. In Exact Synergy Enterprise, you can define ranges for the sizes of your accounts and you can divide your accounts into certain ranges of sizes. This allows you to plan separate marketing events for large and small accounts, depending on which accounts you want to focus on and the policies of handling different types of accounts. You can also apply different marketing strategies based on the account size.

To create sizes, function right **119 — Maintain company size** is required. Users with the **Administrator** and **Marketing manager** roles have this function right.

To create account sizes:

1. Go to Modules → Marketing → Setup → General → Sizes, and click **New**. You will see the following page:

2. Under the **Size** section, type a unique code and a suitable description for the new account size at **Code** and **Description** respectively.
3. Finally, click **Save** to save the new account size, which will be displayed in the list of available sizes, and then **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

Ratings

The last variable that you can use to organize your accounts is rating. Ratings are used to segment your accounts based on the total value of the contracts of the accounts that contributes to your company's revenue. Before you can use the ratings to segment your accounts, you need to determine the ranges of values for the ratings that will be used to classify your accounts. There are two ways to use the rating variable. In the first method, you determine the ranges of values for the ratings, and then link the ratings manually in the account cards.

With the second method, you will determine the ranges of values for the ratings in the same way as for the first method. However, in the second method, you apply a rating to an account using a scheduled background job **CRMRating**. This background job will apply the rating based on the total value of all the contracts that are linked to a certain account and the subsidiaries of the account (child accounts that are linked to the main account). Based on the settings for the ratings in Exact Synergy Enterprise, a rating of 1 to 7 will be given to each account that is linked to the contracts.

These conditions must be met before you can use the background job **CRMRating**:

- The account must be linked to at least one contract.
- The account type is **Customer** or **Reseller**.

To be able to use this method it is important to create contracts for your accounts. To learn how to create contracts for your accounts, see *Chapter 6.1 Contract Management*. Setting up ratings for your accounts using the background job **CRMRating** is described in the Exact Synergy Enterprise **Implementation Manual**.

To set up and modify customer ratings, function right **261 — Maintain rating rules** is required. Users with the **Customer manager** role have this function right.

To set up or modify customer ratings:

1. Go to Modules → Marketing → Setup → Rating: Rule → Customer. You will see the following page:

Rating: List - Rule (Customers) ☆ ?				
Close Validation				
Rating	Type	Amount: Start	Amount: End	Currency
1	Customer	100,000.00	10,000,000.00	EUR
2	Customer	50,000.00	99,999.00	EUR
3	Customer	25,000.00	49,999.00	EUR
4	Customer	10,000.00	24,999.00	EUR
5	Customer	5,000.00	9,999.00	EUR
6	Customer	1,000.00	4,999.00	EUR
7	Customer	0.00	999.00	EUR
Rating: Last update		Unknown		

2. By default, there are seven ratings that are available for you to set up your customer accounts. To set up or modify the details of a rating, click the relevant number in the **Rating** column. You will see the following page:

Rating: Amount 🗄️ ☆ ?		
Close Save		
Rating: Amount		
<div> <div>Rating 1</div> <div>Type Customer</div> <div>Start <input type="text" value="100,000.00"/> x EUR</div> <div>End <input type="text" value="10,000,000.00"/> EUR</div> </div>		
Rating: Amount		
Customer: Rating		
Rating	Amount: Start	Amount: End
1	EUR 100,000.00	EUR 10,000,000.00
2	EUR 50,000.00	EUR 99,999.00
3	EUR 25,000.00	EUR 49,999.00
4	EUR 10,000.00	EUR 24,999.00
5	EUR 5,000.00	EUR 9,999.00
6	EUR 1,000.00	EUR 4,999.00
7	EUR 0.00	EUR 999.00

3. Type the start and end amounts to define the range for the rating at **Start** and **End** respectively.
4. Click **Save** to capture the information for the rating. You will see the updated changes in the list of ratings.
5. Next, click **Close** to exit.

Applying your marketing variables

When you are working with sales teams that focus on different areas, it is important to classify your leads so that the right sales team can follow-up on their assigned accounts.

To modify accounts, function right **524 — View account card** is required. Users with the **Customer manager** role have this function right.

To link accounts to classifications, sources, sectors, subsectors, sizes, or ratings:

1. Go to the account card for which you want to enter the marketing variables. You can find the account card by clicking **Search: Accounts** in the left-lower menu. Alternatively, you can go to Modules → Customers → Reports → Accounts → Search. Type or select the relevant criteria, and then click **Show**.
2. In the **Account name** column, click the relevant account. Then, click **Edit**. You will see the following page:

Marketing

Type
Customer

Since
19-01-1998

Status
Active

Since
27-09-2011

Security level
10

Classification
SE
Small Enterprise

Rating / Source
6
6

Sector
X-1
Unknown

Subsector
00
Unknown

Size
P0001
1 employee

Chamber of Commerce number

Document

Exclude from merging

Import

3. Under the **Marketing** section, type or select the relevant marketing variables for the account.
4. Click **Save** to save the updated information, and then click **Close** to exit.

Note:

Some fields might not be available for editing because of your rights or the customization settings of the account page. You can enable them for editing by clicking **Customize** at the title bar. Click **Advanced**, and then select **Show** in the **Mode** column to display the relevant field. On the **Setting: Card – Mandatory + Properties** page, select **292** in the **Function rights** column to allow status of customer account to be edited. Click **Save** to save the changes, and then click **Close** to exit.

3.1.2 Contacts master data

Titles

Titles are used to address your contact. It is courteous to use an appropriate title when communicating with a business contact as it denotes respect. For example, addressing a doctor using the title “Dr” is an acknowledgement of the person’s achievements.

It is also useful to segment your contacts, for example, referring to the contacts as “Mr” or “Madam” to differentiate between male and female contacts.

To create titles for contacts, function right **120 — Maintain titles** is required. Users with the **Administrator** and **Customer manager** roles have this function right.

To create titles for contacts:

1. Go to Modules → Customers → Setup → General → Titles, and click **New**. You will see the following page:

2. Under the **General** section, type a unique code for the title at **Code**.
3. Next, type a description for the title at **Description**. The description should provide information on the title, such as a definition or for whom the title will be used. This description will be displayed as a prefix to a name on the contact card.
4. At **Heading**, type the letter heading for the title. For example, if the title is for “Mr”, you may type a heading here as “Dear Sir”. This letter heading is used when you create a mail merge.
5. At **Abbreviation**, type a suitable abbreviation for the title. The abbreviation is a short form of the title and is displayed at **Title** in the contact maintenance.
6. Select the **Default** check box if you want to use this title for the language selected at **Language**. If you select the title as the default title for the language, the title will be entered automatically in the **Contacts** section when you select that language on a contact entry page. For more information, see *Chapter 3.4.1 Creating contacts*.
7. Finally, click **Save** to save the changes, and then click **Close** to exit. You can also click **Save + New** to save the changes and create another title.

Note:

All fields with the “!” icon are mandatory.

Job titles

Job titles are descriptive of the roles of the contacts within a company. If you have several contacts for an account, it is useful to know their role within the company so that you can obtain the necessary information or assistance. For example, if you want to present your software to a potential customer, you need to identify the decision maker, such as the director of the department or a senior manager who is able to decide whether the purchase is in compliance with the direction of the company objectives. You can also use the job titles information to market your products and services to the right consumer group.

To create job titles for contacts, function right **96 — Maintain job titles** is required. Users with the **HR** role have this function right.

To create job titles for contacts:

1. Go to Modules → Customers → Setup → General → Contact - Job titles, and click **New**. You will see the following page:

2. Under the **Criteria** section, type a unique code and a suitable description for the new job title at **Code** and **Description** respectively.
3. Click **Save** to save the changes, and then click **Close** to exit. You can also click **Save + New** to save the changes and create another job title.

Note:

All fields with the "!" icon are mandatory.

3.1.3 Account free fields

In Exact Synergy Enterprise, you have a predefined number of fields available on the account card that you can use to enter information about the account. Apart from those fields, you can increase the number of fields by customizing various types of free fields that will then be displayed on the account card under the **Free fields** section. This can be used to store additional information that is specific to your business.

The names of the free fields describe the type of information that they contain. The types of free fields available for customization are:

- **Date** — This free field is used for information that is related to time.
- **Amount** — This free field is used for information that is related to financial amounts or non-discrete values.
- **Text** — This free field is used for information that can be described in text.
- **Yes/No** — This free field is used to denote a positive or negative condition for the property.
- **GUID** (Globally Unique Identifier) — This free field is a unique code generated by SQL. This code is unique within the database and can be used as an identifier for entities such as, accounts.
- **Number** — This free field is used for information that is related to discrete values such as, count, quantity, and values in percentage.

Note:

You can define up to 30 fields for **Text** and up to 5 fields for the other fields. Before you can use the free fields in the accounts, you need to set up the free fields for the accounts. During the setup for the relevant free fields, you must define labels for the free fields. You can also set up indexes for the free fields. Creating indexes for free fields makes it easier for the system to identify opportunities when you are searching for the opportunities using the specified free fields in the search criteria. If an index has been created for the free field, you will see “Yes: OPPORTUNITIES_DateField1” where “DateField1” is the name of the free field in the database. After setting up the free fields, you will see the free field labels on your account cards.


To define account free fields, function right **199 — Allows to define account free fields on corporate level** is required. Users with the **Customer manager** role have this function right.

To set up free fields for accounts:

1. Go to Modules → Customers → Setup → General → Free fields - Accounts. You will see a list of free fields available for your accounts, as shown in the following page:

Accounts: Free fields - Accounts			
<div> <div>Close</div> <div>Refresh</div> <div>Clear</div> </div>			
<input type="checkbox"/> Name	Term	Label	Indexes
<input type="checkbox"/> Date 1	25756	Follow up date	No
<input type="checkbox"/> Date 2			No
<input type="checkbox"/> Date 3			No
<input type="checkbox"/> Date 4			No
<input type="checkbox"/> Date 5			No
<input type="checkbox"/> Amount 1	22370	Annual sales revenue	Yes: CICMPY_NumberField1

- In the **Name** column, click the free field that you want to set up for the accounts. You will see the following page if you have selected the **Text** free fields:

- At **Label**, type a label that describes the information contained by the free field.
- Next, select an option to specify the action to be taken for the free field index at **Indexes**:
 - Update: No** — Select this option to indicate that no action is to be taken on the existing index. If the index does not exist, there will be no action taken to delete it or create one either. This option is selected by default.
 - Delete** — Select this option to delete the index.
 - Create** — Select this option to create an index for the free field.
- If you are defining text fields, you will see the **Selection (Value:Description)** section. You can use this section to define the values available for the free field you are defining. Type the value in the database and the description for the value in the left and right boxes respectively. Then, click . You can repeat this step to add more values.
- Click **Save** to save the setup for the free field, and then click **Close** to exit.

Note:

Depending on the types of field you select, different sections will be displayed.

3.1.4 GUID free fields

Another feature in Exact Synergy Enterprise is the use of the **GUID** free fields on the account card. With a **GUID** field, you can browse for one of these entities: requests, accounts, contacts, transactions, or documents. This allows you to link extra information directly to the account card.

After setting up the **GUID** free field, you will see the free field under the **Free fields** section of the account card, as a text box with **Search**. In order to enter the information for the account, you can type or select an option available in the selection list of the **GUID** free field.

To define account **GUID** free fields, function right **199 — Allows to define account free fields on corporate level** is required. Users with the **Customer manager** role have this function right.

To set up GUID free fields for accounts:

1. Go to Modules → Customers → Setup → General → Free fields - Accounts. You will see a list of free fields available for your accounts.
2. In the **Name** column, click a **GUID** free field. You will see the following page:

3. At **Label**, type a label that describes the information contained by the **GUID** free field.
4. Next, select an option to specify the action to be taken for the free field index at **Indexes**.
5. Select an entity that you want to apply the **GUID** free field at **Reference**. This option will specify the table in the database that the **GUID** field refers to.
6. Type an SQL query at **Selection**. You can use this query to limit the selection possibilities for the entity that the **GUID** refers to.
7. Click **Show** to preview the selection available for the linked entity.
8. Click **Save** to save the setup for the **GUID** free field, and then click **Close** to exit.

3.1.5 Contact free fields

You may need additional or user specific fields to be able to capture specific information for your contacts. For this purpose, Exact Synergy Enterprise provides free fields which you can use to capture the information for the contacts. The free fields you define will be displayed under the **Free fields** section on the contact card.

To define contact free fields, function right **199 — Allows to define account free fields on corporate level** is required. Users with the **Customer manager** role have this function right.

To set up free fields for contacts:


1. Go to Modules → Customers → Setup → General → Free fields - Contacts. You will see a list of free fields available for your contacts, as shown in the following page:

Accounts: Free fields - Contacts			
<div> <div>Close</div> <div>Refresh</div> <div>Clear</div> </div>			
<input type="checkbox"/> Name	Term	Label	Indexes
<input type="checkbox"/> Date 1			No
<input type="checkbox"/> Date 2			No
<input type="checkbox"/> Date 3			No
<input type="checkbox"/> Date 4			No
<input type="checkbox"/> Date 5			No
<input type="checkbox"/> Date 6			No
<input type="checkbox"/> Date 7			No
<input type="checkbox"/> Date 8			No
<input type="checkbox"/> Date 9			No
<input type="checkbox"/> Date 10			No
<input type="checkbox"/> Amount 1			No

2. In the **Name** column, click the free field that you want to set up for your contacts. Depending on the types of field you select, different sections will be displayed. You will see the following page if you have selected the **Text** free fields:

Accounts: Free fields - Contacts (Text 1)	
<div> <div>Close</div> <div>Save</div> </div>	
Text 1	
Label	<input type="text"/>
Indexes	Update: No <input type="button" value="v"/>
Selection (Value:Description)	
Include blank	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>

3. At **Label**, type a label that describes the information contained by the free field.
4. Next, select an option to specify the action to be taken for the free field index at **Indexes**:

- **Update: No** — Select this option to indicate that no action is to be taken on the existing index. If the index does not exist, there will be no action taken to delete it or create one either. This option is selected by default.
 - **Delete** — Select this option to delete the index.
 - **Create** — Select this option to create an index for the free field.
5. If you are defining text fields, you will see the **Selection (Value:Description)** section. You can use this section to define the values available for the free field you are defining. Type the value of the field in the database and the description for the value in the left and right boxes respectively. Then, click . You can repeat this step to add more values.
 6. Click **Save** to save the setup for the free field, and then click **Close** to exit.

3.2 CUSTOMIZING ACCOUNT CARDS

Now that you have learned how to set up the master data and free fields for your accounts, it might be good to know that you can also have some influence on the layout of the account card, access to the account card itself, or access to specific information within the account card.

The customization function allows you to do the following:


- Customize the placements of different fields on the account card or hide the fields from view on the account card.
- Restrict access to the account cards to allow viewing only by personnel from the same division as the account card division.
- Set certain fields to be mandatory when an account is created.
- Restrict viewing or editing for specific fields within the opportunity card via function rights.
- Create accounts quickly by hiding fields that are not relevant for your organization.
- Improve the quality of your account information by making it mandatory for users to enter information that is important to your company.
- Maintain a high level of data integrity by allowing only a few employees to edit important fields.
- Ensure that the relevant information is accessible by the right employees.

3.2.1 Customizing account card layouts

When you customize the layout of an account card, you can change the way that the fields are presented or select certain fields to be displayed. You can customize this to a way that is more logical for your own use. If you have administrator rights, you can change the layout of a card based on the role of the user viewing the card.

Customizing the layout of account cards (new mode)

Exact Synergy Enterprise allows you to customize the layout for the account card (new mode). You can select only certain fields that you want to display, arranged into a single column or in multiple columns. You can also customize the placement of the sections on the account entry page.

The  **Customize** icon is available to all. However, to customize the layout of the account card in the new mode at the corporate level, function right **498 — Allows to update the company wide account card customization** is required. Users with the **Administrator** role have this function right. If the user does not have this function right, the user can only customize the layout of the account card (new mode) at the person level.

To customize the layout of account cards (new mode):













- 1. Go to Modules → Customers → Entry → Entry → Account. You will see the following page:

Select: Type

☆

?

Close

Type: Company	Policy
 Prospect	
 Customer	
 Associate	
 Supplier	
 Reseller	
 Division	
 Bank	
 Lead	
 Suspect	
Type: Person	Policy
 Prospect	
 Customer	
 Supplier	

Note:
The **Type: Person** section will only be displayed if you are using the **Natural person** functionality. For more information on the **Person** (or **Natural person**) functionality, see *Chapter 3.6 Activating and Exploring the Person (or Natural person) Feature*.

2. On the account entry page, click  **Customize** at the title bar. You will see the following page if you have selected **Customer** under the **Type: Company** section.

Settings: Card - Customise

Close Save Reset Advanced

Created by admin 08-09-2015 15:31
Modified by Angel Chan 01-10-2015 15:04

Card: Template ☐ Person ☒ Corporate


Columns ☐ 1 ☒ 2 ☐ 3 ☐ 4

1	2
<input checked="" type="checkbox"/> Summary <input checked="" type="checkbox"/> Code 991074 <input checked="" type="checkbox"/> Name <input checked="" type="checkbox"/> Address line 1 <input type="checkbox"/> Address line 2 <input type="checkbox"/> Address line 3 <input checked="" type="checkbox"/> Postcode <input checked="" type="checkbox"/> City <input checked="" type="checkbox"/> Country NL — Netherlands <input checked="" type="checkbox"/> State <input checked="" type="checkbox"/> Website <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> Phone <input checked="" type="checkbox"/> Extension <input checked="" type="checkbox"/> Fax <input type="checkbox"/> General <input type="checkbox"/> County <input type="checkbox"/> Phone queue <input type="checkbox"/> Remarks <input type="checkbox"/> Remarks <input type="checkbox"/> Free fields	<input checked="" type="checkbox"/> Contact <input checked="" type="checkbox"/> Title MR — Mr. <input checked="" type="checkbox"/> Initials <input checked="" type="checkbox"/> First name <input checked="" type="checkbox"/> Middle name <input checked="" type="checkbox"/> Last name -- <input checked="" type="checkbox"/> Job description -- <input checked="" type="checkbox"/> Job title <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> Valid email address <input checked="" type="checkbox"/> Email permission <input checked="" type="checkbox"/> Phone <input type="checkbox"/> Extension <input checked="" type="checkbox"/> Mobile <input type="checkbox"/> Language EN — English <input type="checkbox"/> Fax <input checked="" type="checkbox"/> Marketing <input checked="" type="checkbox"/> Type Customer <input checked="" type="checkbox"/> Type since 01-10-2015 <input checked="" type="checkbox"/> Status Active <input checked="" type="checkbox"/> Status since 01-10-2015 <input checked="" type="checkbox"/> Security level 10 <input checked="" type="checkbox"/> Classification SE — Small Enterprise <input checked="" type="checkbox"/> Rating 7 — 7 <input checked="" type="checkbox"/> Source P — Phone <input checked="" type="checkbox"/> Sector UNKNOWN — Unknown <input type="checkbox"/> Subsector


3. At **Card: Template**, select an option to apply the changes at that level:
- **Person** — Select this option to apply the customization to the account cards viewed by the user only. Everyone can customize the account card layout at the person level.
 - **Corporate** — Select this option to apply the customization to all users. Only users with the **Administrator** role have the function right and can customize the account card layout at the corporate level.
4. At **Columns**, select the number of columns that you want to use to organize the sections on your account card. You can select up to four columns.
5. Select the check boxes for the sections and fields under the respective sections that you want to display. To prevent the sections and fields under the respective section from being displayed on the account card, clear the check boxes for the respective sections and fields.
6. Click **Save** to save the customization of the new layout, which will be displayed on the account card in the new mode, and then click **Close** to exit.

Customizing the layout of account cards (view mode)

You can select certain buttons, fields, and links that will be displayed when the account card is being viewed. Similar to the customization of the account (new mode), you can specify the number of columns on the account card and the placement of the sections within the layout of the account card.

The  **Customize** icon is available to all. However, to customize the layout of the account card in the view mode at the corporate level, function right **498 — Allows to update the company wide account card customization** is required. Users with the **Administrator** role have this function right. If the user does not have this function right, the user can only customize the layout of the account card (view mode) at the person level.

To customize the layout of existing account cards:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant criteria, and then click **Show**. You will see a list of customer accounts.
2. Click the relevant account name in the **Account name** column.
3. On the account card, click  **Customize** at the title bar.

Settings: Card - Customise

Close Save Reset Advanced

Created by Angel Chan 03-09-2015 16:04
Modified by Angel Chan 01-10-2015 15:09

Card: Template ☐ Person ☒ Corporate

Columns ☐ 1 ☒ 2 ☐ 3 ☐ 4

1

☐ Buttons

☒ Edit

☐ Data: Log

☐ Actions

☒ Create letter

☐ Label

☒ Create email

☒ Customer rates

Columns ☐ 1 ☒ 2 ☐ 3 ☐ 4

2

☐ Links

☐ Map

☒ Addresses

☐ Buy D&B report

1

☒ Summary

☒ Name Cafe Hout - 60093

☒ Address line 1 Americastraat 13

☐ Address line 2

☐ Address line 3

☒ Postcode 6300

☒ Country Netherlands (NL)

☒ Website

☒ E-mail

☒ Phone

☒ Fax

☒ Code

☒ City Valkenburg LB

☒ State Limburg

☒ Extension

☒ Monitor

Columns ☐ 1 ☐ 2 ☒ 3 ☐ 4

☒ Contracts

☐ Items

☒ Workflow

2

☒ Contacts

Rows 4

☒ External References

Type Link

Rows 10

☒ Marketing

Type Customer

Status Active

Security level 10

Source Phone

Sector Unknown

Classification Café

Size Unknown

Type since 05-12-2011

Status since 05-12-2011

Subsector

Rating 7

4. At **Card: Template**, select an option to apply the changes at that level:
 - **Person** — Select this option to apply the customization to the account cards viewed by the user only. Everyone can customize the account card layout at the person level.
 - **Corporate** — Select this option to apply the customization to all users. Only users with the **Administrator** role have the function right and can customize the account card layout at the corporate level.
5. At **Columns**, select the number of columns that you want to use to organize the buttons, links, and sections on your account card. You can select up to four columns.
6. Select the check boxes for the buttons that you want to display under the **Buttons** section. To prevent the buttons from being displayed on the account card, clear the check boxes for the respective buttons.


Note:

- When you create databases from product update 250 onwards, the **Mail merge** check box under the **Buttons** section will not be available. The **Word Merge** feature has replaced the mail merge functionality.
- Existing users moving to product update 250 will still have the old mail merge functionality by default, and this can be switched to the new **Word Merge** functionality. For more information, see *Appendix F: Exact Word Merge*. When the **New Word Merge** check box is selected on the **Documents: Settings** page, the **Mail merge** check box will not be displayed under the **Buttons** section during the customization of account cards layout. Instead, the **Create letter** and **Create email** buttons will be displayed if you have selected the **Create letter** and **Create email** check boxes under the **Buttons** section.

7. Select the check boxes for the sections and fields under the respective sections that you want to display. To prevent the sections and fields from being displayed on the account card, clear the check boxes for the respective sections and fields.
8. Click **Save** to save the customization of the new layout, which will be displayed on the account card in the view mode, and then click **Close** to exit.

Customizing the layout of account cards (edit mode)

You can select only certain buttons and fields to be displayed when you are modifying the account card. In addition to that, you can determine the number of columns you want to arrange your sections in and the placement of the sections within the account card.

The  **Customize** icon is available to all. However, to customize the layout of the account card in the edit mode at the corporate level, function right **498 — Allows to update the company wide account card customization** is required. Users with the **Administrator** role have this function right. If the user does not have this function right, the user can only customize the layout of the account card (edit mode) at the person level.

To customize the layout of account cards (edit mode):

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant criteria, and then click **Show**. You will see a list of customer accounts.
2. Click the relevant account name in the **Account name** column.

3. On the account card, click **Edit**, and then click  **Customize** at the title bar. You will see the following page:

4. At **Card: Template**, select an option to apply the changes at that level.
- **Person** — Select this option to apply the customization to the account cards viewed by the user only. Everyone can customize the account card layout at the person level.
 - **Corporate** — Select this option to apply the customization to all users. Only users with the **Administrator** role have the function right and can customize the account card layout at the corporate level.
5. At **Columns**, select the number of columns that you want to use to organize the buttons, links, and sections on your account card. You can select up to four columns.
6. Select the check boxes for the buttons that you want to display under the **Buttons** section. To prevent the buttons from being displayed on the account card, clear the check boxes for the respective buttons.
7. Select the check boxes for the sections and fields under the respective sections that you want to display. To prevent the sections and fields from being displayed on the account card, clear the check boxes for the respective sections and fields.
8. Click **Save** to save the customization of the new layout, which will be displayed on the account card in the edit mode, and then click **Close** to exit.

3.2.2 Limiting access to account cards

In some organizations, every salesperson can be considered as an individual enterprise and you might want to prevent salespeople who are competing amongst each other to meet sales targets, from looking at the customer information belonging to their colleagues. Access rights allow you to restrict the use and update of information by the relevant individuals only.

In Exact Synergy Enterprise, it is possible to limit access to the entire account. Users with the function right **524 — View account card** are able to customize the function rights for the respective fields and view the fields. Users with the **Customer manager** role have this function right.

Note:

This function right and the corresponding roles are part of a default installation of Exact Synergy Enterprise.

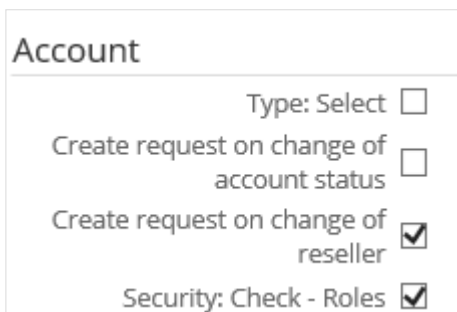
After customizing the roles for the access to the account card, you can enable the restrictions for the cards. By enabling a function to check on the user roles, you can limit the access to the account card by allowing only the users with the correct roles to access the account card. If the role checking function is disabled, the users are allowed to access the account card based on the security level of the account. When the function is enabled, the following checks apply:

- Employees without the function right will only see accounts linked to the same cost center that they are in.
- An employee who is the account manager for the accounts will see the accounts.
- An employee with a role (by default, the role is **Customer manager**) that is linked to function right **524 — View account card** at the corporate level, will be able to view all the accounts. If the role is linked to the function right at the division level, only accounts that are linked to his or her division can be viewed. If the role is linked to the function right at the cost center level, only accounts that are linked to his or her cost center can be viewed.

To enable the security check for account cards, function right **222 — Maintain CRM settings** is required. Users with the **Administrator** and **Customer manager** roles have this function right.

To enable the security check for account cards:

1. Go to Modules → Customers → Setup → Other → Settings, and then click **Edit**.
2. The **Accounts: Settings** page will be displayed.
3. Under the **Account** section, select the **Security: Check - Roles** check box.




The screenshot shows a settings window titled "Account". It contains several checkboxes: "Type: Select" (unchecked), "Create request on change of account status" (unchecked), "Create request on change of reseller" (checked), and "Security: Check - Roles" (checked).

4. Click **Save** to save the changes, and then click **Close** to exit.


Limiting access to fields in account cards

Besides limiting the access to the complete account card, you can also limit the access to specific fields based on the function right of the user who is viewing the account card. You can define function rights to restrict access to specific fields for a specific type of account card.

The  **Customize** icon is available to all. However, only users with the function right **430 — Maintain CRM account field visibility** are able to customize the function rights for the respective fields.

To limit access to fields in account cards:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant search criteria, and then click **Show**.
2. On the **Accounts: Search** page, under the **Account name** column, click the name of the relevant account.

3. On the account card, click  **Customize** at the title bar, and then click **Advanced**. You will see the following page:

Settings: Card - Mandatory + Properties

Close Save Reset

Created by Coert Hagestein 08-09-2007 02:20
Modified by Yuen Kai Yeow 23-08-2013 17:09

Type Customer
Status Active
Level Employee

Buttons	Mandatory	Mode	Function rights
Edit		Show	
Data: Log		Show	
Actions		Show	273 Allows to validate customers
Create letter		Show	
Create email		Show	
Customer rates		Show	
Label		Show	

Links	Mandatory	Mode	Function rights
Map		Show	
Addresses		Show	
Buy D&B report		Show	

General	Mandatory	Mode	Function rights
Code <input checked="" type="checkbox"/>		Edit	411 Allows to modify the account code
Name <input checked="" type="checkbox"/>		Edit	
Address line 1 <input checked="" type="checkbox"/>		Edit	
Address line 2 <input type="checkbox"/>		Edit	
Address line 3 <input type="checkbox"/>		Edit	
Zip code <input type="checkbox"/>		Edit	
City <input type="checkbox"/>		Edit	
Country <input checked="" type="checkbox"/>		Edit	
State <input type="checkbox"/>		Edit	

- At **Type**, select the type of account for which you want to apply the customization of function right.
- At **Status**, select the status of the account for which you want to apply the customization of function right.
- At **Level**, select the level of personnel for which you want to apply the customization of the function right.
- In the **Mode** column, select the mode for the function rights that you will be defining for your buttons, links, and fields. The combination of the modes and function rights will determine whether the user has access to a specific field, and whether the user is able to view the field or is able to edit the field. Fields that can be edited will have all three modes whereas hyperlinks, buttons, monitor links, and fields that cannot be edited will only have two modes: **Show** and **Hide**. The following are the modes for the fields that are available:
 - Edit** — The field can be edited when the account card is in the edit mode and viewed when the account card is in the view mode.
 - Show** — The field can be viewed when the account card is in both the view and edit modes but cannot be edited in the edit mode.
 - Hidden** — The field cannot be viewed when the account card is in either the view or edit mode.


Note:

- The associated function right also affects which mode the field is shown in. If a user has the associated function right, then the field is displayed according to the rules of the mode. If the user does not have the function right, the field is displayed according to the mode which is one level below the defined mode. For example, if a field is set to the **Edit** mode with a function right, then a user who does not have the function right, will only be able to view the field (**Show** mode) instead of viewing and editing the field (**Edit** mode).
- When you create databases from product update 250 onwards, the **Mail merge** field under the **Buttons** section will not be available. By default, the **Word Merge** feature has replaced the mail merge functionality. No settings are required.
- Existing users moving to product update 250 will still have the mail merge functionality by default, and this can be switched to the new **Word Merge** functionality. For more information, see *Appendix F: Exact Word Merge*. When the **New Word Merge** check box is selected on the **Documents: Settings** page, the **Mail merge** option on the **Settings: Card** page will be replaced by the **Create letter** and **Create email** options under the **Buttons** section.

8. In the **Function rights** column, select the function right for the related buttons, links, and fields. If you specify a function right for a specific button, link, or field, only users with that function right are able to view the buttons, links, or fields.
9. Click **Save** to save the changes, and then click **Close** to exit.

3.2.3 Mandatory fields

Since your account information is the basis for all your sales and marketing activities, you should make sure that at least a minimum amount of required information is completed when an employee creates an account. To ensure that this happens, you can make certain fields mandatory so that the new account cannot be saved until those fields are completed. This will ensure that at least the minimum amount of information that your organization needs is available in Exact Synergy Enterprise.

The  **Customize** icon is available to all users. However, only users with the function right **498 — Allows to update the company wide account card customization** are able to customize the mandatory fields.

To define mandatory fields for account cards:













- 1. Go to Modules → Customers → Entry → Entry → Account. You will see the following page:

Select: Type

☆


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Close

Type: Company	Policy
 Prospect	
 Customer	
 Associate	
 Supplier	
 Reseller	
 Division	
 Bank	
 Lead	
 Suspect	
Type: Person	Policy
 Prospect	
 Customer	
 Supplier	

Note:
The **Type: Person** section will only be displayed if you are using the **Natural person** functionality. For more information on **Person** (or **Natural person**) functionality, see *Chapter 3.6 Activating and Exploring the Person (or Natural person) Feature*.

- 2. Click the type of account for which you want to define the mandatory fields.

3. On the account entry page, click  **Customize** at the title bar. Next, click **Advanced**. You will see the following page:

Settings: Card - Mandatory + Properties

Close Save Reset

Created by Dinn Brands 15-02-2012 02:28
Modified by Dinn Brands 15-02-2012 02:28

Type
Status
Level

Summary	Mandatory	Mode	Function rights
Code <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	411 Allows to modify the account code
Name <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	
Address line 1 <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Address line 2 <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Address line 3 <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Postcode <input type="checkbox"/>	<input type="checkbox"/>	Edit	
City <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Country <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	
State <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Website <input type="checkbox"/>	<input type="checkbox"/>	Edit	
E-mail <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Phone <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Extension <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Fax <input type="checkbox"/>	<input type="checkbox"/>	Edit	

General	Mandatory	Mode	Function rights
County <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Phone queue <input type="checkbox"/>	<input type="checkbox"/>	Edit	

Contact	Mandatory	Mode	Function rights
Title <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	
Initials <input type="checkbox"/>	<input type="checkbox"/>	Edit	
First name <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Middle name <input type="checkbox"/>	<input type="checkbox"/>	Edit	
Last name <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	

- At **Type**, select the type of account for which you want to apply the customization of mandatory fields.
- At **Status**, select the status of the account for which you want to apply the customization of function right.
- At **Level**, select the level of personnel for which you want to apply the customization of the function right.
- Under the **General** section in the **Mandatory** column, select the check boxes for the relevant fields to indicate that the fields must be filled before you are allowed to save the account information.
- Click **Save** so that the mandatory fields are applied to the account entry page for the selected account type.
- Click **Close** to exit.

3.3 CAPTURING ACCOUNT INFORMATION

Capturing the account information is the first step in building the basis for your customer relationship management activities. With this information, your sales and marketing people will then plan and carry out marketing and sales activities, such as promotional events, advertising, meetings with potential customers, and conducting product presentations. Therefore, it is clear that for these activities to be successful, it is essential for you to have extensive and correct information about your accounts.

This subchapter will describe four ways of entering accounts into Exact Synergy Enterprise, maintaining data integrity for your accounts through management of duplicate accounts, and assigning accounts to reseller accounts.

3.3.1 Entering new accounts

This manual will follow an account as it starts out as a lead in your organization until it has become a valued customer.

An account type usually starts out as a **Suspect**, when opportunities have been identified for your company. You will then contact the accounts with the type **Suspect** to try and interest them in your products and services, or the business of your company.

When a suspect becomes interested in learning more about your company's products and services after the initial contact, the account type then becomes a **Lead**. The **Lead** account progresses to a **Prospect** account when the lead expresses a strong interest in conducting business with your company. At this point, you will be presenting your business proposals to try and secure the business deal. When customer meetings and negotiations are finalized and a deal is reached between the prospect and your company, the **Prospect** account becomes a **Customer** account.

In conclusion, the types of accounts in Exact Synergy Enterprise are able to capture all information about the accounts at any stage of the sales cycle. The information captured during the sales cycle is important to help you to make accurate decisions in winning business deals. Thus, the first step in this process is of course, the creation of accounts in Exact Synergy Enterprise.

All users can create accounts. Users can create **Customer** accounts directly only if the **Mandatory: Contract** check box is not selected at Modules → Customers → Setup → Other → Settings.


Note:





As of product update 250, the **Person** (or **Natural person**) feature is introduced, which allows you to create accounts based on persons, apart from the conventional company-based accounts. For more information on the **Person** (or **Natural person**) functionality, see *Chapter 3.6 Activating and Exploring the Person (or Natural person) Feature*.


To create accounts:

1. Go to Modules → Customers → Entry → Entry → Account and select the type of account that you want to create. The **Accounts: Customer** page will be displayed as shown in the following if you have selected **Customer** under the **Type: Company** section.

Summary



Code	<input type="text" value="991074"/>	
Name	<input type="text"/> 	
Address	<input type="text"/>	
Postcode / City	<input type="text"/> 	<input type="text"/>
Country / State	NL  Netherlands	<input type="text"/> 
Website	<input type="text"/>	
E-mail	<input type="text"/>	
Phone / Extension	<input type="text"/>	<input type="text"/>
Fax	<input type="text"/>	

2. On the left hand side of the **Summary** section, you can add a picture or change the existing picture of the account by hovering your mouse over the picture, and then clicking **Add picture** or **New picture** respectively. To remove a picture that has been uploaded, hover over the picture, and then click .
3. At **Code**, type a unique code to identify the account. By default, the account code is automatically generated.
4. Type the name of your account at **Name**.

5. Next, define the relevant information in the respective fields. By default, the country defined on the division card of the account (the division selected under the **Financial** section) is selected at **Country**.

Contact	
Title / Initials	MR Mr. <input type="text"/>
First name	<input type="text"/>
Middle name	<input type="text"/>
Last name	-- <input type="text"/>
Job description	-- <input type="text"/>
Job title	<input type="text"/>
E-mail	<input type="text"/>
Valid email address	<input type="checkbox"/>
Email permission	<input type="checkbox"/>
Phone	<input type="text"/>
Mobile	<input type="text"/>

6. Under the **Contact** section, define the relevant details of the main contact for the account at the respective fields. By default, the title at **Title / Initials** is automatically prefilled.

Caution:

- When creating a company-based account, it is mandatory to create at least one contact. If you save the account without entering the contact, an empty contact entry line will be saved automatically.
- The **Contact** section is available only in company account cards.

Marketing	
Type	Customer
Since	01-10-2015
Status / Since	Active 01-10-2015
Security level	<input type="text" value="10"/>
Classification	RES Restaurant
Rating	7 7
Source	P Phone
Sector	UNKNOWN Unknown
Size	UNKNOWN Unknown


7. Under the **Marketing** section, define the relevant properties of the account that can be used to categorize the account at the respective fields. By default, a security level of **10** at **Security level** and the default marketing properties are automatically selected at **Type**, **Since**, **Status / Since**, **Classification**, **Rating**, **Source**, **Sector**, and **Size**.

Note:

You can set up the default values for the marketing properties at Modules → Customers → Setup → Other → Settings.

Relations	
Manager	204524 — Paul Kaeser
Reseller	390036 
Parent account	

8. Under the **Relations** section, type or select the people or accounts that are related to the new account at **Manager**, **Reseller**, and **Parent Account**. By default, the reseller is the account on the division card and the account manager is the person defined as the account manager of the account on the division card.

Financial	
Division	036 
Customer code	390320

9. Under the **Financial** section, select or type the information related to payments from the customer accounts at the respective fields. By default, the division of the creator is selected at **Division** and the account code is entered at **Customer code**.

Note:

Depending on the type of accounts you are creating, the type of information displayed under the **Financial** section may be different.

10. Click **Save** to save the changes, and then click **Close** to exit. You can also click **Save + New** to save the changes and create another account.

Note:

All fields with the “!” icon are mandatory.

3.3.2 Accounts batch entries

In Exact Synergy Enterprise, there is a batch entry function that allows you to create multiple accounts on one single entry page. This batch entry functionality allows you to create up to 10 new accounts per batch creation. You can specify common and account-specific characteristics such as the country, language and marketing variables.

All users can access the accounts batch entry function.

Note:

This feature is available only for company accounts.

To create a batch of accounts:

1. Go to Modules → Customers → Entry → Entry → Accounts batch entry and select the type of account that you want to create. The following page is a sample of a new batch entry for the account type **Customer** selected under the **Type: Company** section:

Batch entry: Accounts: New - Customer

Created by Dinn Brands 17-11-2015 11:57

Close Save Save + New

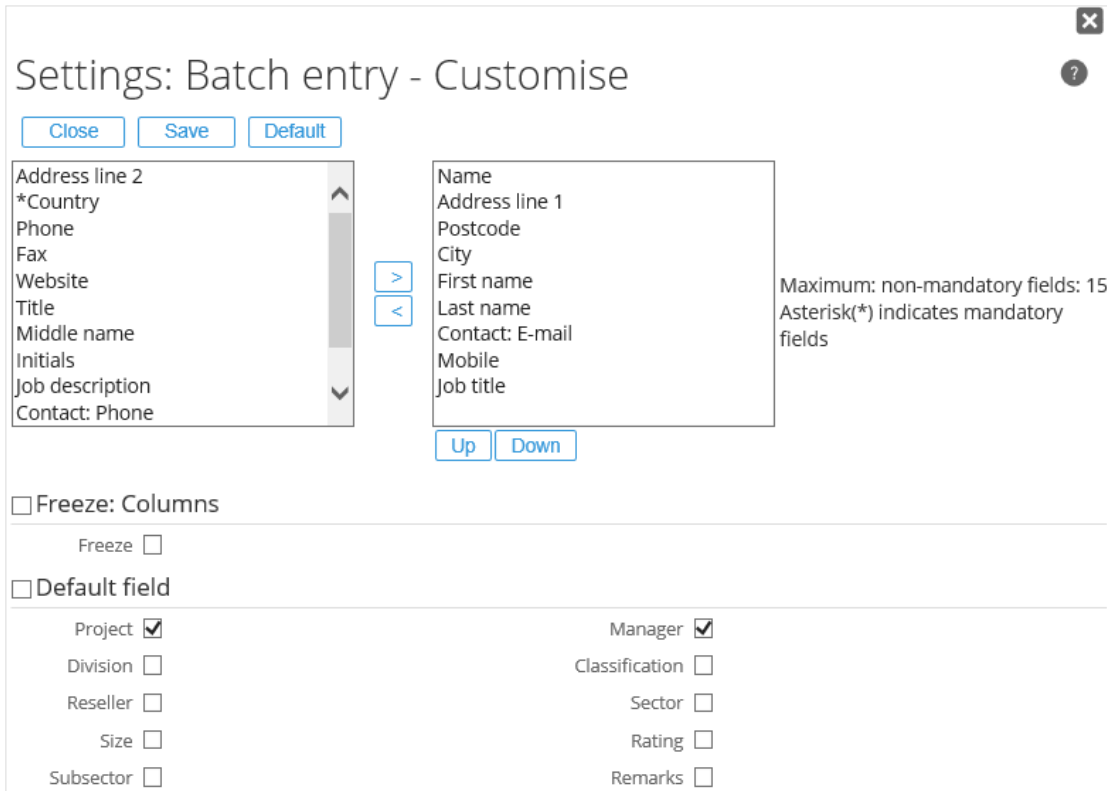
Default field

Project Manager 1 Private

	Name	Address line 1	Postcode	City	First name	Last name	Co
1	✗	⚠					
2	✗	⚠					
3	✗	⚠					
4	✗	⚠					
5	✗	⚠					
6	✗	⚠					
7	✗	⚠					
8	✗	⚠					
9	✗	⚠					
10	✗	⚠					

2. Under the **Default field** section, fill in the information that is common for the batch of accounts that you want to create. At **Project** and **Manager**, type or select the project and the manager for the new accounts. By default, the division manager of the creator's division is selected.
3. Click **Customize** at the title bar to customize the fields available in this section. Under the **Default field** section, select the required fields. For example, the **Division** field allows you to type or select the division for the new accounts at **Division**. By default, the division defined in the creator's personal card is selected. The **Reseller** field allows you to type or select a reseller code at **Reseller** to link the accounts to a reseller.
4. Define the other fields as needed.
5. In the entry line for individual accounts, define the relevant information for each of the fields for the new accounts. The account codes will be automatically generated for the new accounts. The **Name** column is a mandatory field to be filled.

6. Click  **Customize** at the title bar to customize the columns available under this section.



Settings: Batch entry - Customise

Close Save Default

Address line 2
*Country
Phone
Fax
Website
Title
Middle name
Initials
Job description
Contact: Phone

> <

Name
Address line 1
Postcode
City
First name
Last name
Contact: E-mail
Mobile
Job title

Up Down




Maximum: non-mandatory fields: 15
Asterisk(*) indicates mandatory fields

☐ Freeze: Columns

Freeze ☐

☐ Default field

Project ☒ Manager ☒
Division ☐ Classification ☐
Reseller ☐ Sector ☐
Size ☐ Rating ☐
Subsector ☐ Remarks ☐

7. Click  to add or  to remove columns from the list of available options on the left window to the required columns list in the right window. For example, the **Country** column allows you to type or select a country for the account. This is mandatory. If no country is selected, the country that is linked to the division at **Division** under the **Default field** section, will be selected by default. **Job description** allows you to describe the job of the contact person of this account.
8. Then, click **Save** to return to the **Batch entry: Accounts: New – Customer** page.
9. In the **Title** column, select a title for the contact person of this account. If no title is selected, the title that is linked to the language defined in the creator's personal card is selected by default.
10. Click  **Delete** to remove account entry lines if necessary.
11. Click **Save** to save the entries, and then click **Close** to exit. You can also click **Save + New** to save the changes and create another batch of accounts.

3.3.3 Import Wizard

There could be instances whereby you need to enter a large quantity of accounts that already exists in a file. It could be that you have acquired a large number accounts from merging with another company or received referrals from other parties such as, partners, associates, and resellers. It is also common practice for companies to purchase account data from external sources that specialize in the sales and purchase of customer data. These new accounts can be captured into Exact Synergy Enterprise manually or imported directly from a data file.

The manual method of capturing accounts is done by entering the account information directly using the account entry page, as discussed in *Chapters 3.3.1 Entering new accounts* and *3.3.2. Accounts batch entries*. To create multiple accounts in Exact Synergy Enterprise by importing an external data file, you can use the accounts import wizard. The following procedure describes how you can capture account information using the accounts import wizard.

The accounts import wizard imports data from CSV and Microsoft Excel files. In order to import the data file, you can map the account fields in Exact Synergy Enterprise to the corresponding data rows in the source file. You also need to manage the duplicate accounts if applicable. The accounts import wizard will guide you through the procedure, one step at a time. The steps taken during your import process can be saved in a template that can be used again to avoid having to repeat the same import steps for future data imports. In addition to creating accounts, the import wizard gives you the flexibility of linking the accounts to a project, for instance a marketing campaign that is the source of the accounts.

To import accounts using the import wizard, function right **383 — XML Upload: Account / Contact** is required. Users with the **Customer manager**, **XML Administrator**, and **XML User** roles have this function right.

Note:


- It is recommended to select a file that contains 20,000 records or less. If the file contains more than 20,000 records, the system may fail to import all accounts within the limit of two hours.
- All entries imported from external data files will be created by the accounts import wizard as company accounts.

New imports

To import a set of accounts:

1. Go to Modules → Customers → Entry → Entry → Accounts import wizard. You will see the following page:

Import: Accounts (Step 1 of 10)


Select: Menu

Select whether you want to start a whole new import or you want to use your import templates.


[New import](#)

[My import templates](#)

Cancel

2. Select **New import** to start the process. The following page will be displayed:

Import: Accounts (Step 2 of 10)

 File to import: Accounts

1. Source
Select the file to be imported

☒ Text file (.txt, .csv) ☐ Excel file (.xls)

File

2. Delimiter
Select the delimiter of your file or choose other and enter the delimiter.

☒ ,
☐ ;
☐ Tab
☐ Space
☐ Other

Other

3. Text qualifier
Format

3. Under the **1. Source** section, select either **Text file (.txt, .csv)** or **Excel file (.xls)** to indicate the type of file to be imported. Then, type a file name or click **Browse** to select the file that you want to import at **File**.

Note:

- It is recommended to select a file that contains 20,000 records or less. If the file contains more than 20,000 records, the system may fail to import all accounts within the limit of two hours.
- All entries imported from external data files will be created by the accounts import wizard as company accounts.


4. Under the **2. Delimiter** section, select the delimiter used to separate your data in the files. A delimiter denotes when the start of each data begins and ends so that the system knows how to read the input data. Some common delimiters are comma (,), semicolon (;), tab, space, and others. For other types of delimiters, select **Other** at **Delimiter**, and then specify the delimiter at **Other**.
5. Under the **3. Text qualifier** section at **Format**, select the symbol that you want to be recognized as text or part of the data, instead of a delimiter. For example, you might want to treat an apostrophe as part of a name or word, so you specify the apostrophe symbol (') here.

Note:

If **Excel file (.xls)** is selected, both sections, **2. Delimiter** and **3. Text qualifier**, are not applicable. Click **Next**, and then select the appropriate worksheet that you want to import.




6. Click **Next** and the following page will be displayed:

Import: Accounts (Step 3 of 10)


Select: Default value

The following selection will be used by default for the data to be imported.

Criteria

Division	<input type="text" value="036"/>	 Exact Asia Development
Project	<input type="text"/>	
Account manager	<input type="text"/>	
Account type	<input type="text" value="Associate"/>	▼
Financial account	<input type="text" value="Accounts"/>	▼


- Under the **Criteria** section, define the default values at the respective fields for the accounts that will be imported. By default, the division of the creator is selected at **Division**. Select or type another division to assign another division.
- At **Project**, select or type a project to link the new accounts to this project.
- Type or select the account manager at **Account manager**. If there is no person defined, the creator will be selected as the account manager when the accounts are successfully imported and saved.
- Next, select the type of accounts that you want to create at **Account type**. This account type will be applied to all your new accounts.
- Select the financial account type at **Financial account** to specify whether the new account is a debtor, a creditor, or is not linked to the financial administration. When you select **Accounts**, no

financial account is created. If you select **Debtor** or **Creditor**, a financial account of this type will be created.

Note:
The options available in financial account are dependent of the selected account type and follow the same logic when creating an account manually.

12. Click **Next** and the following page will be displayed:

Import: Accounts (Step 4 of 10)

 Does the file have a header?

If the file has a header with the field names select 'Yes'.

Header ☒ No ☐ Yes

Data

100;Account A;07072015

200;Account B;11112015


Back

Next

Cancel

13. Select **Yes at Header** to indicate that there are headers with field names in the file, or **No** to indicate otherwise. Click **Next** and the following page will be displayed:

Import: Accounts (Step 5 of 10)

 Map import fields


The first rows from your file are shown, in the first column you can select the target field.

Column	Row 1	Row 2
<input type="text"/>	100	200
<input type="text"/>	Account A	Account B
<input type="text"/>	07072015	11112015

[Back](#) [Next](#) [Cancel](#)

14. In the **Column** column, select the relevant fields to map them to the corresponding fields in the import file. If your import file uses a column header for each field in the data file, it will be displayed in the **Row 1 (Header)** column. The other **Row** columns display the information read from each row of data in the import file. When a field name in the **Row 1 (Header)** column matches the corresponding field name in the **Column** column, then these fields are automatically mapped. After selecting the correct field names for the corresponding data, click **Next**. You will see the following page:

Import: Accounts (Step 6 of 10)

 Confirm the types of the fields

Select the format of the numeric and data fields.

Column	Type	Format	Row 1	Row 2	Row 3	Row 4	Row 5
Code	Text		100	200			
Name	Text		Account A	Account B			
follow up date	Date	<input type="text" value="dd-mm-yyyy"/>	07072015	11112015			


[Back](#) [Next](#) [Cancel](#)

15. In the **Format** column, define the format for the corresponding data type in the **Type** column.

Note:
This step is done only when a field has the data type **Number** or **Date**. For these two field types, you can select a format to specify the number or date format used in the import file.

16. Click **Next**. You will see the following page:

Import: Accounts (Step 7 of 10)

 Do you want to update existing accounts?

Some accounts from the import file already exist in the system. These accounts are in the list below. Select the accounts that you want to update.

You are able to compare the accounts in your import file with those in the system by ticking checkbox 'Compare'.

☐ Compare

Page size [Show](#)

<input type="checkbox"/>		
<input type="checkbox"/> 100	Account A	07072015
<input type="checkbox"/> 200	Account B	11112015

[Back](#) [Import](#) [Cancel](#)

17. Select the **Compare** check box to view the duplicate accounts that already exist in Exact Synergy Enterprise. If you want to update an existing account, select the check box next to the account that you want to overwrite.

Note:
If no duplicate accounts are found, this step is skipped.

18. Click **Next**. You will see the following page:

Import: Accounts (Step 8 of 10)

Create new: Accounts

The following new accounts are found, select the rows for which you want to create a new account. Only these records will be created during import.

Page size15Show

<input checked="" type="checkbox"/>	Code	Name	Postcode
<input checked="" type="checkbox"/>	CC	Coffee	C
<input checked="" type="checkbox"/>	48372		
<input checked="" type="checkbox"/>	SF	Sanfranc	
<input checked="" type="checkbox"/>	87534		
<input checked="" type="checkbox"/>	YC	Yummy	Co
<input checked="" type="checkbox"/>	67456		

Back

Import

Cancel

19. This page gives an overview of all accounts that will be created. By default, all accounts are selected. If you wish to exclude one or more account from being created, clear the check boxes for the relevant accounts. Click **Import**. You will see the following page:

Import: Accounts (Step 9 of 10)

Import results

The file is imported

Results

Newly created 2

Updated 0

Rejected 5


View import details☒

Next









Cancel

20. Select the **View important details** check box and click **Next** to display the details of the import results as shown in the following page:

Import: Accounts (Step 9 of 10)

 Import results

The file is imported


Type	Date ▲▼	Batch	Node	Key	Description
	09-07-2015 15:39:51	209224	Account		[Line no.: 1] Mandatory: Name
	09-07-2015 15:39:51	209224	Account		[Line no.: 2] Mandatory: Name
	09-07-2015 15:39:52	209224	Account	390325	Created
	09-07-2015 15:39:53	209224	Account		[Line no.: 4] Mandatory: Name
	09-07-2015 15:39:53	209224	Account	87534	[Line no.: 5] Mandatory: Name
	09-07-2015 15:39:53	209224	Account		[Line no.: 6] Mandatory: Name
	09-07-2015 15:39:54	209224	Account		Created: 2, Updated: 0, Rejected: 5
	09-07-2015 15:39:54	209224	Account	390326	Created

Page size [Show](#)

[Next](#) [Cancel](#)


21. Click **Next** after you have finished viewing the details of the import results. The following page will be displayed:

Import: Accounts (Step 10 of 10)

 Save import definition

Enter the name of the import template and save.

Template

Name 

Save as ☒ Private ☐ Public

[Save](#) [Finish](#)

22. On this page, you have the option to save all the steps taken during the import process in a template. This template can be used to skip step 3 of 10 until step 6 of 10 in future data imports. You can save the template as **Private** if you want the template to be available only to the user who completed the import or **Public** if you want the template to be available to all users.
23. Finally, click **Save** to save the import template and complete the import process, or click **Finish** to complete the import process without saving the import template.

Note:

All fields with the "!" icon are mandatory.

Importing accounts using import templates

If you already have existing templates for importing the external data files, you can use the import templates saved during your previous data import. Import templates allow you to save the options and criteria specified in each of the steps used in a particular data import session. Using import templates enables you to reduce the number of steps that will be taken in the next data import.

To import a set of accounts using existing import templates:

1. Go to Modules → Customers → Entry → Entry → Accounts import wizard and select **My import templates**. You will see the following page:

Import: Accounts

Select an import template

Select an import template

1. Type of template

Type **Public: Division**

2. Template

☒ Import Template - Mandy

☐ Debtor template


☐ Creditor template

Rename Delete Next Cancel

2. A list of import templates that were created in previous data imports will be displayed. Under the **1. Type of template** section at **Type**, select the required template based on the template type.

3. Select an import template under the **2. Template** section. Click **Next**. You will see the following page:

Import: Accounts (Step 2 of 10)

 File to import: Accounts

1. Source
Select the file to be imported

☒ Text file (.txt, .csv) ☐ Excel file (.xls)

File [Browse...](#)

2. Delimiter
Select the delimiter of your file or choose other and enter the delimiter.

☒ ,
☐ :
 Delimiter ☐ Tab
☐ Space
☐ Other


Other

3. Text qualifier
Format

[Back](#) [Next](#) [Import](#) [Cancel](#)

4. Under the **1. Source** section, select either **Text file (.txt, .csv)** or **Excel file (.xls)** to indicate the type of file to be imported. Then, type a file name or click **Browse** to select the file that you want to import at **File**. The delimiter and the text qualifier settings under the **2. Delimiter** section and the **3. Text qualifier** section respectively, if applicable, is based on the selected template. If **Excel file (.xls)** is selected, click **Next** to select the appropriate worksheet that you want to import.
5. Click **Import**. By doing so, you will skip step 3 of 10 to step 6 of 10 of the importing procedure. If you want to change the import criteria in the current import template, click **Next**. You will then need to go through step 3 of 10 to step 6 of 10. Otherwise, you will see the following page, which is a sample of duplicate accounts found in the database:

Import: Accounts (Step 7 of 10)

 Do you want to update existing accounts?

Some accounts from the import file already exist in the system. These accounts are in the list below. Select the accounts that you want to update.

You are able to compare the accounts in your import file with those in the system by ticking checkbox 'Compare'.

☐ Compare

Page size [Show](#)

<input type="checkbox"/>		
<input type="checkbox"/> 100	Account A	07072015
<input type="checkbox"/> 200	Account B	11112015

[Back](#) [Import](#) [Cancel](#)

- 6. A list of accounts in the import file that already exist in the database will be displayed. Select the **Compare** check box to view the duplicate accounts that already exist in Exact Synergy Enterprise.

Note:
If there are duplicate accounts that need to be updated and accounts that need to be created, you will see the **Next** button so that the user can go to the list of accounts that need to be created. If there are only duplicate accounts that need to be updated, you will see the **Import** button instead so that the import can be started immediately.

- 7. Select the accounts you want to update, and then click **Next**. You will see the following page:

Import: Accounts (Step 8 of 10)

Create new: Accounts

The following new accounts are found, select the rows for which you want to create a new account. Only these records will be created during import.

☒

200

Account B


11112015

Page size 15 Show

Back Import Cancel

8. The new accounts that will be created will be listed and the corresponding check boxes next to account codes will be selected by default. Clear the relevant check boxes to remove the selection for the accounts that you do not want to create. Then, click **Import**. The Import results page will be displayed:

Import: Accounts (Step 9 of 10)

 Import results

The file is imported

Results

Newly created 0

Updated 0


Rejected 1

View import details ☒

[Next](#) [Cancel](#)



9. Select the **View import details** check box to display the details of the import results, and then click **Next**. You will see the following page:

Import: Accounts (Step 9 of 10)

 Import results

The file is imported


Page size [Show](#)

Type	Date ▲▼	Batch	Node	Key	Description
	09-07-2015 15:50:51	13	Account	200	[Line no.: 2] Error: Generate - Code (Account) Invalid URI: The format of the URI could not be determined. Please contact your system administrator for further help.
	09-07-2015 15:50:51	13	Account		Created: 0, Updated: 0, Rejected: 1

[Next](#) [Cancel](#)

10. In the **Description** column, the number of accounts and contacts created, updated, or rejected during the import are displayed. Click **Next**. You will see the following page:

Import: Accounts (Step 10 of 10)

 Save import definition

Enter the name of the import template and save.

Template

Name

Save as ☒ Private ☐ Public

11. At **Name**, type a new name to save the import template under a different name, if required. By default, the name of the current import template is displayed.
12. Next at **Save as**, select **Private** if you want the template to be available only to the user who completed the import or **Public** if you want the template to be available to all users.
13. Finally, click **Save** to save the import template and complete the import process, or click **Finish** to complete the import process without saving the import template.

Note:

All fields with the “!” icon are mandatory.

3.3.4 Double account entry management

It is possible that more than one account exists in the database for one physical account. This is in conflict with one of the objectives of Exact Synergy Enterprise, which is to have a single access point for all information about an account. The occurrence of duplicate accounts could be due to reasons, such as incorrect manual entries, imports, or organizational procedures. Duplicate accounts are unnecessary data that clutter your database.

With the inconsistency of information present in the duplicate accounts, there could be cases whereby information is sent to the wrong address, and updated for the wrong account. When information is stored in more than one account, data is incomplete or not updated. In Exact Synergy Enterprise, there are two methods of managing duplicate accounts. The methods are double accounts reports and deduplication. The difference between the deduplication method and the double accounts report are as follows:

Double accounts report	Deduplication
Limited options for specifying the criteria to validate and merge accounts.	Allows the user to define an extensive selection of criteria to validate and merge accounts.
Merging is only allowed for a pair of duplicate accounts.	Allows batch processing of the merging of accounts.
Allows the user to either add or merge the contacts during the merging of accounts. No merge conditions are available for contacts.	Allows the user to add or merge the contact found in the duplicate accounts at the same time the accounts are merged. The user can specify a variety of merge conditions for contacts.
Allows the user to generate reports on duplicate accounts, which can be used to manually merge accounts.	Allows the user the option of either simulating or actually performing the deduplication.
Accounts and contacts are automatically merged based on the user-defined criteria. The actual merging is performed by a background job.	

Double accounts report

The double accounts report and the deduplication method can both be used to merge accounts. With the double accounts report, you can manually merge a pair of duplicate accounts, whereas deduplication performs this task for a batch of duplicate accounts. Choose the method that best suits the task that you want to perform.

All users can access this report. However, to merge duplicate customer accounts using the double accounts report, function right **273 — Allows to validate customers** is required. Users with the **Customer manager** role have this function right.

To merge duplicate reseller accounts using the double accounts report, function right **274 — Allows to validate resellers** is required. Users with the **Reseller manager** role have this function right.

To manually merge duplicate accounts using the double accounts report:

1. Go to Modules → Customers → Reports → Quality analysis → Doubles - Accounts. You will see the following page:

Accounts: Doubles - Account (Name)

Close Show Reset

Criteria

Division 036 Exact

Division 036 Exact

Type

Status

Account manager

Exclude: Subsidiaries ☐

2. Under the **Criteria** section, define the relevant search criteria, and then click **Show**. The following page is a sample of duplicate records found based on the defined criteria:

Note:

You will see a list of accounts for which there are duplicate records. The accounts are grouped based on account names.

Accounts: Doubles - Account (Name) Close Refresh Reset

Criteria

Division: [Exact](#)

Division: [Exact](#)

Type:

Status:

Account manager: [Exact](#)

Exclude: Subsidiaries ☐

Page size: [Show](#)

Code	Division	Type	Status	Exclude from merging
Name: 3420 DB 96				
1582009032940	036 - Exact	Associate	Active	
1582009032941	036 - Exact	Associate	Active	
Name: 3700 AP 640				
1582009033156	036 - Exact	Associate	Active	
1582009033157	036 - Exact	Associate	Active	
Name: 6503 GE 6743				
1582009033062	036 - Exact	Associate	Active	
1582009033063	036 - Exact	Associate	Active	
Name: 6881 NK 358				
1582009032956	036 - Exact	Associate	Active	
1582009032957	036 - Exact	Associate	Active	
1582009032958	036 - Exact	Associate	Active	
Name: 7050 AC 138				
1582009032995	036 - Exact	Associate	Active	

3. In the **Code** column, click the account code of one of the duplicate accounts to see the account card. Next, click **Actions**. For example, if you have clicked **Merge: Account**, you will see the following page:

Accounts: Actions Close Advanced >> Merge Delete

Created by [Norana Abu Bakar](#) 15-09-2011 10:53
Modified by [Norana Abu Bakar](#) 15-09-2011 10:59

General

Code: 1582009033510
Name: ASOCIACION DE PEQUEÑA Y MEDIANA EMPRESA DE ARANJU
Address: 110

Zip code / City
State / Country
Country: [Malaysia \(MY\)](#)
Phone (Fax)
E-mail
Website
Remarks

Marketing

Type / Since: Customer
Status / Rating: Active
Classification: [To be classified](#)
Source: [Phone](#)
Sector / Subsector: [Need to Determine](#)
Size: [Need to determine](#)
Manager: [Paul Kaeser](#)
Reseller: [Exact Centre Sdn Bhd](#)
Division: [Exact](#)
Customer code: 1582009033510

Results - Validation

Name: ASOCIACION DE PEQUEÑA Y MEDIANA EMPRESA DE ARANJU

Name	Code	Customer code	Vendor code	Zip code	City	Contact	Type	Status	Division	Exclude from merging
ASOCIACION DE PEQUEÑA Y MEDIANA EMPRESA DE ARANJU	1582009033511	797248				--	Customer	Active	Exact	

If there are any duplicate accounts, the duplicate accounts will be displayed under the **Results - Validation** section. Select the relevant duplicate account under the **Results - Validation** section, and then click **Merge**. For example, if you have selected the company account type, you will see the following page:

Accounts: Actions ★ ?

[Close](#) [Merge](#) Created by [Norana Abu Bakar](#) 15-09-2011 10:59
Modified by [Norana Abu Bakar](#) 15-09-2011 10:59

Results - Validation

[General](#) [Marketing](#) [Free fields](#) [Contact](#)

Copy	Account: Existing
Code 1582009033510 Name <input type="checkbox"/> ASOCIACION DE PEQUEÑA Y MEDIANA EMPRESA DE ARANJU Address <input type="checkbox"/> 110 <input type="checkbox"/> <input type="checkbox"/> Zip code <input type="checkbox"/> City <input type="checkbox"/> Country <input type="checkbox"/> Malaysia Phone <input type="checkbox"/> Fax <input type="checkbox"/> E-mail <input type="checkbox"/> Remarks <input type="checkbox"/> Website <input type="checkbox"/>	Code 1582009033511 Name ASOCIACION DE PEQUEÑA Y MEDIANA EMPRESA DE ARANJU Address 130 Zip code City Country Malaysia Phone Fax E-mail Remarks Website

Note:

You can select one duplicate account. If more accounts match the criteria, you have to perform the same actions to merge a second account.

- Under the **General**, **Marketing**, and **Free fields** tabs in the **Copy** column, you can select the fields with the information you want to retain. Select the corresponding check boxes for the fields with the information you want to retain after the accounts are merged.

Note:

The information at the respective fields in the **Copy** column will be copied over to the fields in the **Account: Existing** column if the particular fields are blank.

- Under the **Contact** tab in the **Copy** column, select **Add: Contacts** or **Merge** to indicate whether the contact information should be added or merged:
 - Add: Contacts** — Select this option to add the contacts in the account in the **Copy** column to the contact information in the account in the **Account: Existing** column.
 - Merge** — Select this option to merge duplicate contacts in the account in the **Copy** column to the contact information in the account in the **Account: Existing** column. If you select this, you will see the fields under the **Contacts** section on the account card listed for both accounts under the **Contact** tab. You can select the contact in the **Contact: Existing** column to merge the particular contact with a contact in the **Copy** column. If you select the check box for the relevant fields in the **Copy** column, the information will be copied over to the contact information in the **Contact: Existing** column, if the corresponding field is blank.

Note:

This tab is available only when merging duplicate company accounts.

- Click **Merge** to start the merging of the accounts. After the accounts are merged, the account in the **Copy** column will be deleted whereas the account in the **Account: Existing** column will be retained.

Deduplication

Like the double accounts report, the deduplication method allows you to validate and merge duplicate accounts. However, this method is available only for merging duplicate company accounts. You can use this method to detect if there are any duplicate accounts in the database, and then take the necessary actions to remove the duplicate accounts. The deduplication method offers more merging conditions than the double accounts report and is able to merge a batch of multiple accounts instead of just a pair of duplicate accounts. The deduplication method automatically validates the duplicate accounts, and then merges the duplicate accounts using a background job, whereas the double accounts report requires you to manually identify the duplicate accounts that you want to merge, and then merges the accounts. To merge duplicate accounts using the deduplication method, the **Exact.Jobs.SysHrMail.dll** background job needs to be set up and configured. For more details about scheduling background jobs, see *Chapter 5 Background Jobs Configuration* in the Exact Synergy Enterprise **Implementation Manual**.

With the deduplication method, you can set a variety of merge conditions for both accounts and contacts. In addition, you can set the number of records that will limit the number of accounts to be validated. Because the deduplication process is fully automated in a background job, there is an option to preview the results of the merging before performing the actual merging process. It is advisable to generate a preview of the deduplication results before actually performing the actual merging process.

When the conditions for the validation and merging of duplicate accounts are defined and the merging process is initiated, a scheduled background job will process the batch of duplicate accounts data. After the job is executed and completed, the system will generate a Microsoft Excel report and attach the file to a request that will be sent to the workflow of the user who submitted the background job for the deduplication process. The Microsoft Excel report contains the merged results, which includes a list of all the duplicate accounts that were or can be merged, according to the validation criteria and merge conditions. If there are errors encountered at the validation stage during the deduplication process, the errors will be listed.

It is a good practice to use the deduplication method on a regular basis to maintain the integrity of the accounts data in your database.

To perform deduplication and to view the deduplication log, function right **608 — Allows to perform accounts/contact deduplication tasks** is required. Users with the **Administrator** role have this function right.

To merge duplicate accounts using the deduplication method:

1. Go to Modules → Customers → Reports → Quality analysis → Deduplication. You will see the following page:

Accounts: Deduplication
☆ ? ⚙

Close Reset Process

^ Master settings

Merge ⚠
Contacts ⚠
Comparison Within selection criteria

Batch size

^ Merge selection criteria

Type ☐ Associate ☐ Prospect ☐ Customer ☐ Supplier ☐ Reseller ☐ Division ☐ Bank ☐ Not validated ☐ Lead ☐ Suspect
Status ☐ Active ☐ Blocked ☐ Inactive ☐ Not validated ☐ Passive ☐ Pilot ☐ Reference
Division
Country
Project
Classification

^ Account merge conditions

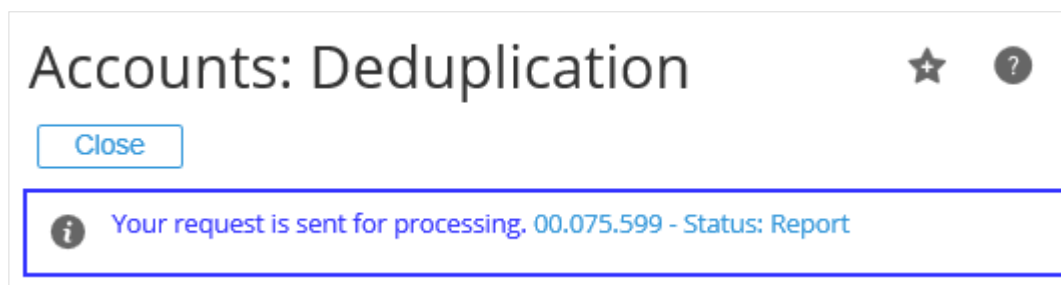
Type: Address Visit
Name (Stripped) ☐ Phone (Stripped) ☐ Zip code ☐
Address ☐

2. Under the **Master settings** section, select an option at **Merge** to define whether you want to preview the results or execute an actual merge based on your defined criteria. Select one of the following:
 - **Actual** — Select this option if you want to execute the deduplication.
 - **Preview** — Select this option if you want to preview the results of the deduplication.
3. Select an option at **Contacts** to define how you want to merge the contacts for the accounts that will be merged. Select one of the following:
 - **Merge** — Select this option if you want to merge the duplicate contact information for the accounts that will be merged. If you select this option, you will see the **Contacts merge conditions** section.
 - **Add** — Select this option if you want all contacts to be copied to the target account.
4. At **Comparison**, select an option to define how the merge conditions selected under the **Merge selection criteria** section will be applied to the database:
 - **Entire database** — This option compares the accounts selected to all accounts in the entire database.
 - **Within selection criteria** — This option compares all accounts within the selection.
5. At **Batch size**, you can limit the number of accounts that will be checked. This is useful when there is a large number of accounts that meet the selection criteria.
6. Under the **Merge selection criteria** section, define the relevant criteria on which to perform deduplication. Only accounts that match these criteria will be checked for duplicates.
7. Under the **Account merge conditions** section, you have to define at least one condition for merging accounts. This is mandatory because the accounts will not be merged if no conditions are defined. You can, for example, choose to merge accounts with the same name and zip code.
8. Under the **Contact merge conditions** section, you have to define at least one condition for merging contacts. You can, for example, choose to merge contacts with the same first, middle, and last name.

Note:

This section is available only if you have selected **Merge** at **Contacts** under the **Master settings** section.

9. Click **Process** to start the deduplication.
10. You will see a box with the message “The background job may be taking a long time to process, confirm on the selection criteria made?”. Click **Yes** to continue, or **No** to cancel the process.
11. After you have clicked **Process**, the background job will be sent for processing. The job ID will be displayed, as shown in the following page:



12. Click the job ID to view the status report on the **Accounts: Deduplication - Log** page. The following page is an example of a status report for the deduplication process:

Accounts: Deduplication - Log

CloseRefreshReset

Criteria

Creator

Date (Processed)

--

--

Status

☐ Completed

☐ Error

☐ Open

☐ Running

ID

Creator

Created

Status

Merge

Batch size

Start date

End date

Remarks

Delete

Reset

75599

Jo-Anna Goh Li Ping

01-07-2015 16:35

Open

Preview

2

-

75416

Gawri Kumar

01-12-2009 15:28

Completed

Preview

03-03-2010 17:18

03-03-2010 17:18

75341

Choon Hou Lee

08-09-2009 08:24

Completed

Actual

08-09-2009 08:24

08-09-2009 08:24

75340

Choon Hou Lee

08-09-2009 08:22

Completed

Preview

08-09-2009 08:22

08-09-2009 08:22

75339

Choon Hou Lee

08-09-2009 08:17

Completed

Actual

08-09-2009 08:17

08-09-2009 08:17

75338

Choon Hou Lee

08-09-2009 08:15

Completed

Preview

08-09-2009 08:15

08-09-2009 08:15

75337

Choon Hou Lee

08-09-2009 08:12

Completed

Preview

08-09-2009 08:12

08-09-2009 08:12

75336

Choon Hou Lee

08-09-2009 08:08

Completed

Preview

08-09-2009 08:08

08-09-2009 08:09

75333

TLH

24-08-2009 10:50

Completed

Actual

24-08-2009 10:50

24-08-2009 10:50

75332

TLH

24-08-2009 10:44

Completed

Preview

24-08-2009 10:44

24-08-2009 10:45

75331

TLH

21-08-2009 10:26

Running

Preview

21-08-2009 17:47

21-08-2009 16:48

-

Page size

15

Show

All users can access the accounts validation report.

To validate accounts:

1. Go to Modules → Customers → Reports → Quality analysis → Validation. You will see the following page:

Accounts: Validation

Close Show Reset

^ Criteria

Division Country

Type ☐ Associate ☐ Bank ☐ Customer ☐ Division ☐ Lead ☐ Not validated ☐ Prospect ☐ Reseller ☐ Supplier ☐ Suspect

Status ☐ Active ☐ Blocked ☐ Inactive ☐ Not validated ☐ Pilot ☐ Reference ☐ Passive

Error: Contains Error: Contains

Check Group by

2. Under the **Criteria** section at **Type**, select the relevant account type check boxes to specify the type of accounts that you want to check. If no account type is selected, all types of account will be checked.
3. Select the relevant account status check boxes at **Status** to specify the status of the accounts that you want to check. If no account type is selected, accounts with all statuses will be checked.
4. Next, select the type of error at **Error: Contains** to display the accounts with the specified type of error.
5. Select the information that you want to check on the account card at **Check**. Leave this option blank to display all errors that are found. The following options are available:
 - **Account** — Select this option to display the errors related to the account information, such as the account classification, rating, vendor code, and customer code.
 - **Contact** — Select this option to display the errors related to the account information, such as the contact's e-mail, job title, and phone number.
 - **Address** — Select this option to display the errors related to the address information, such as the account's address.

6. Click **Show** to display the results based on the defined criteria. The following page is a sample of the results:

Accounts: Validation

Close Refresh Reset

Criteria

Division Country

Type ☐ Associate ☐ Bank ☒ Customer ☐ Division ☐ Lead ☐ Not validated ☐ Prospect ☐ Reseller ☐ Supplier ☐ Suspect

Status ☐ Active ☐ Blocked ☐ Inactive ☐ Not validated ☐ Pilot ☐ Reference ☐ Passive

Error: Contains Error: Contains

Check Group by

Page size 15 Show

Name	City	Country	Type	Status	Error
' SPRESSO	LOVENDEGEM	Belgium	Customer	Active	Mandatory: SalesPersonNumber Invalid: Tax - Schedule
TURES DE LOS ANDES LTDA. TURA	ZIPAQUIRA	Colombia	Customer	Active	Mandatory: SalesPersonNumber Invalid: Tax - Schedule
!GO the resource company	OOSTERHOUT	Netherlands	Customer	Inactive	Mandatory: SalesPersonNumber Invalid: Tax - Schedule
"14014" Taxi Ruf Bremen	BREMEN	Germany	Customer	Inactive	Mandatory: SalesPersonNumber Invalid: Tax - Schedule
"Aldik" Sp. z o.o.	LUBLIN	Poland	Customer	Active	Mandatory: SalesPersonNumber Invalid: Tax - Schedule Mandatory: E-mail - Contact
"arena" SMW Sport + ModeVertriebsges. mbH & Co.KG	BAYREUTH	Germany	Customer	Passive	Mandatory: SalesPersonNumber Invalid: Tax - Schedule

Note:

- You will see an overview of the accounts with the respective errors found in the accounts. The errors are listed in the **Error** column and the information type, such as account, contact, or address is listed along with the field that contains the error. To correct the errors on the account card, click the relevant account card in the **Name** column.
- For person accounts, you can perform validation via Modules → Customers → Reports → Accounts → Search. On the person account card, click **Actions**. A list of validated results will be displayed under the **Results – Validation** section.

7. Click **Close** to exit.

3.3.6 Linking accounts to reseller organizations

When you are dealing with a lot of customers, you might want to create a reseller organization to act on behalf of the company. Resellers acts as middle men to your customers and they can generate revenue by marketing and selling your products and services. They are different from your other customers because in addition to purchasing your products and subscribing to your services, they are allowed special access to information about your products and services, and are entitled to privileges, such as full time technical support. A reseller can be an existing customer who has established a long term relationship with your company, or a new organization with which you have just started doing business with.

Note:

This feature is available only for company accounts.

Changing customer accounts to reseller accounts

First of all, you want to register the resellers in Exact Synergy Enterprise so that you know who they are and how to contact them.

To modify account types, function right **524 — View account card** is required. Users with the **Customer manager** role have this function right.

To change existing customer accounts to reseller accounts:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant search criteria, and then click **Show**.
2. In the list of search results, click the name of the customer account that you want to change to a reseller. Next, click **Edit**. The following page is a sample of the **Marketing** section of a customer account card:

Marketing

Type

Customer

Since

19-01-1998

Status

Active

Since

27-09-2011

Security level

10

Classification

SE

Small Enterprise

Rating / Source

6

6

I — Import

Sector

G-1

G- Retail Trade

Subsector

Size

P0001

1 employee

Chamber of Commerce number

Document

Exclude from merging

3. At **Type**, select **Reseller** as the account type, and then click **Save** to save the changes.

Registering customer accounts to reseller accounts

Now that you have successfully created your resellers in Exact Synergy Enterprise, you may also want to register the customers that they will be dealing with. You can register this on the account card of particular customers.

To register customer accounts to reseller accounts, function right **524 — View account card** is required. Users with the **Customer manager** role have this function right.

To register customers for reseller accounts:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant search criteria, and then click **Show**.
2. In the list of search results, click the name of the customer account you want to register with a reseller. Next, click **Edit**. The following page is a sample of the **Relations** section of a customer account card:

Relations	
Manager	178995 — Ralph Versweyveld
Cost center	126SMLOC — BU Sales Local
Reseller	<input type="text" value="200023015"/> PACOM B.V.B.A.
Parent account	<input type="text"/>

3. At **Reseller**, select the reseller account that you want to link the customer to, and then click **Save** to save the changes.

Getting overviews of accounts linked to reseller accounts

A reseller can serve a lot of accounts. Reports are available to give insight to this kind of information. All users can access the reseller account report.

To get overviews of reseller accounts:

1. Go to Modules → Customers → Reports → Resellers → Accounts. You will see the following page:

Reseller: Accounts					
<div> <input type="button" value="Close"/> <input type="button" value="Show"/> <input type="button" value="Reset"/> </div>					
<div> <div> <div>^</div> <div>Reseller (1)</div> </div> <div> <div>Reseller</div> <div><input type="text"/></div> <div></div> </div> </div>					
<div> <div> <div>^</div> <div>Reseller (more)</div> </div> <div> <div> <div>Division</div> <div><input type="text"/></div> <div></div> </div> <div> <div>Status</div> <div><input type="text"/></div> <div></div> </div> <div> <div>Classification</div> <div><input type="text"/></div> <div></div> </div> </div> <div> <div>Postcode</div> <div><input type="text"/></div> </div> <div> <div>Rating</div> <div><input type="text"/></div> <div>—</div> <div><input type="text"/></div> </div> </div>					
<div> <div> <div>^</div> <div>Account</div> </div> <div> <div> <div>Account: Type</div> <div><input type="text"/></div> </div> <div> <div>Account: Status</div> <div><input type="text"/></div> </div> </div> <div> <div>Account: Classification</div> <div><input type="text"/></div> <div></div> </div> </div>					

2. Under the **Reseller (1)** section at **Reseller**, type or select the reseller for which you want to view the accounts the reseller is responsible for.
3. Next, under the **Reseller (more)** section, type or select a division at **Division** to view the accounts that are managed by all resellers in that division.
4. Click **Show** to view the results based on the defined criteria, and then click **Close** to exit.

Note:

- All fields with the “!” icon are mandatory.
- You can click  **Export: Excel** at the title bar to view the list of accounts in a Microsoft Excel file, or  **Printable** to print the report.

3.4 CAPTURING CONTACT INFORMATION

Now that you have entered your accounts into Exact Synergy Enterprise, it is important to take a look at the contact persons that are linked to those accounts. When you are dealing with large accounts, you might have more than one contact within that account that you need to deal with. In this case, you want to make sure you are communicating with the right contact person every time, instead of communicating irrelevant questions and information to the wrong contact.

In Exact Synergy Enterprise, it is possible to link more than one contact to each account. In addition, you can enter specific information, such as the title, job title, job description, contact number, and e-mail address for each contact.

Note:

Contacts or contact persons are created in company accounts, and can be linked to person accounts and contacts. For more information on person accounts, see *Chapter 3.6 Activating and Exploring the Person (or Natural person) Feature*.

3.4.1 Creating contacts

When creating an account, it is mandatory to have at least one contact. If you do not add a contact, a contact card without information will be saved and linked to the account automatically. You can also specify a main contact if you have more than one contact linked to the account.

By default, all users who can view the account can create contacts accounts.


To create contacts:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant search criteria, and then click **Show**. On the search results page in the **Account name** column, click the name of the relevant account. You will see the following page:

Accounts: Customer

Close Edit Create letter Create email Customer rates

Created by admin 05-12-2011 10:29
Modified by Angel Chan 03-09-2015 16:05



Cafe Hout - 60093

Address: Americastraat 13
Postcode / City: 6300 Valkenburg LB
Country / State: Netherlands (NL) Limburg

Website
E-mail
Phone / Extension
Fax

Contracts **Workflow** **Projects**
Documents **Transactions** **Sales invoice**
Opportunities **Quotations** **Reports**

Remarks - None

Contacts All Add

Mevr. Brouw --

External References Add

Type	Link
Marketing	
Type / Since	Customer 05-12-2011
Status / Since	Active 05-12-2011
Security level	10
Source	Phone
Sector	Unknown
Classification / Rating	Café 7
Size	Unknown

Relations

Manager
Cost centre
Reseller
Parent account
Subsidiaries (0)

2. Click **Add** under the **Contacts** section. You will see the following page:

Contacts

Title

MR

Mr.

Initials

First name

Middle name

Last name

--

Suffix

Job description

--

Job title

Phone

Extension

Mobile

Fax

E-mail

Valid email address

☐

Email permission

☐

Financial contact person

☐

Language


EN

English

Main

☐

3. Under the **Contacts** section, type or select a title for the contact person at **Title**. By default, the title linked to the language defined on the creator's personal card is selected.
4. Type a last name for the contact person at **Last name**.
5. Next, type a first name for the contact person at **First name**.
6. At **Job description**, type a job description for the contact person. The job description states the job scope of the contact person within the company. This information is displayed next to the contact name on the account card. It is useful to know the function of the person within the company so that you know the right person to contact to obtain certain information or decision.
7. Type or select a job title for the contact person at **Job title**. The job title is the formal title of the contact within the contact's company. For example, the Head of the IT department is also called the Chief Information Officer.
8. Type a phone number at **Phone** and a direct extension of the contact at **Extension**, if any. By default, the phone number of the account will be filled in at **Phone**.
9. Type a mobile number of the contact at **Mobile**.
10. Type an e-mail address of the contact at **E-mail**.
11. Select the **Main** check box if this contact is the main contact for the account.

Marketing	
Account manager	
Job title (Account manager)	
Manager (Contact)	178995  Ralph Versweyveld
Job title (Contact: Manager)	
Portal access	<input type="checkbox"/>
Last: Login None	

12. Under the **Marketing** section, select or type an employee ID at **Manager (Contact)** if the contact is required to liaise with another employee other than the manager of the account. This person is responsible for communications with the contact person of the account. By default, the manager of the account will be selected.
13. Select the **Portal access** check box if you want to allow the contact to access the system using the customer portal. For more information on the customer portal, see *Chapter 7.2 Customer Portals*.
14. Click **Save** to save the changes, and then click **Close** to exit. You can also click **Save + New** to save the changes and create another contact.

3.4.2 Changing the main contact

In Exact Synergy Enterprise, there is a difference between the main contact and the other contacts. The importance of the main contact for an account will be discussed in detail when you are assigning portal access to your customers. For more information, see *Chapter 7.2.1 Setting up default customer portal*.

The main contact will be listed at the top of the list of all contacts and is the main point of communications for all matters that concerns the account. Over time, you might want to identify a new main contact after adding more contacts to that account. Your main contact will change based on the amount of correspondence with a new contact person, changes in the role of the main contact, or based on the fact that the original main contact has left that company.

By default, all users who can view the accounts can modify the contacts for accounts.

To change the main contact:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant search criteria, and then click **Show**. On the search results page in the **Account name** column, click the name of the relevant account. You will see the following page:

Accounts: Customer

Close Edit Mail merge Customer rates

Created by 01-12-2010 10:39
Modified by Dinn Brands 02-10-2015 15:49

Cafe Hout - 60093

Address: Americastraat 13
Postcode / City: 6300
Country / State: Netherlands (NL)
Valkenburg LB Limburg

Website
E-mail
Phone / Extension
Fax

Contacts

All Add

Mr. James Brouw - Sales manager brouw.kl@gmail.com
Mr. Joshua Cheng - --

External References

Add

Type	Link
in	https://www.linkedin.com/pub/james-brouw/64/6b6/64b

Marketing

Type / Since	Customer	01-12-2010
Status / Since	Active	01-12-2010
Security level	10	
Source	Phone	
Sector	Unknown	
Classification / Rating	Café	7
Size	Unknown	

Remarks - None

2. Under the **Contacts** section, the main contact person is indicated with . Click the name of a different contact that you want to indicate as the main contact, and then click **Edit**. You will see the following page:

Contact: Joshua Cheng

Close Save Delete Inactive vCard >

Customer: Cafe Hout
Status: Active Rating: 7
Created by Dinn Brands 01-10-2015 16:50
Modified by Dinn Brands 01-10-2015 17:01

Contacts

Title: MR Mr.
Initials:
First name: Joshua
Middle name:
Last name: Cheng
Suffix:
Job description: --
Job title:
Phone:
Extension:
Mobile:
Fax:
E-mail:
Valid email address: ☐
Email permission: ☐
Financial contact person: ☐
Language: EN English
Main ☒

Picture

Upload: Browse...

Remarks

User name:

Timestamp Full screen

Password:

ECP Authentication

Portals Edit Rights

New

Portal	Access rights	Check Out Rights	View All Carts Rights

Employment

Start date: 01-10-2015
End date: --

3. Under the **Contacts** section, select the **Main** check box to indicate this contact as the main contact.
4. Click **Save** to save the changes.

3.4.3 Double contact entry management

Similar to accounts, you would want to make sure that there are no multiple entries of contact persons listed for your accounts. If the information of a contact is entered twice, there may be a possibility that the contact is treated as two separate contact persons. Therefore, any other related information that your company has acquired when conducting business with the account might be split over these two entries or linked to both contacts. Depending on which contact you use, this will give you only partial information regarding the contact and the account.

There may also be cases whereby different employees enquire for the same information from the same contact person, and your customer may end up having a bad impression of your company. The confusion that results from a miscommunication can have a negative impact on the relationship that you are trying to build and maintain with that account and specifically that contact.

One of the highlights of Exact Synergy Enterprise is being able to provide a single access point for all account related information and this includes the contact information captured in a certain account. You can maintain the integrity of the contact information using the double contacts report and the deduplication function. You can use either method to validate and merge your contact information, depending on how you want to manage the duplicate contact information. For more information on the deduplication function, see *Chapter 3.3.4 Double account entry management*.

To validate and merge duplicate entries for contacts, function right **495 — Maintain CRM data when MainCRMBackOffice is set for current division** is required. Users with the **Administrator** and **General manager** roles have this function right.

To validate and merge duplicate entries for contacts in account cards:

1. Go to Modules → Customers → Reports → Quality analysis → Doubles - Contacts. Define the relevant search criteria, and then click **Show**. If there are double entries of contacts, the results will be displayed, as shown in the following example:

Accounts: Doubles - Account (Contacts)

Close
Refresh
Reset
Validation

Criteria

Division: 000 Exact Holding N.V. Classification:

Reseller:

Account: Type ☐ Associate ☐ Bank ☐ Customer ☐ Division ☐ Lead ☐ Not validated ☐ Prospect ☐ Reseller ☐ Supplier ☐ Suspect

Account: Status ☐ Active ☐ Blocked ☐ Inactive ☐ Not validated ☐ Pilot ☐ Reference ☐ Passive

Matched ☒ First + Middle + Last ☐ First + Last ☐ Last

Inactive ☐ Match (Gender) ☐

Title	Initials	Contact	Main	Phone	E-mail	Language
Account : BDO CampsObers, Information technology						
De heer		J.M. Suerink				
Mr.		J.M. Suerink		010-2424680		
Account : BMCI Bank Agence Casa Hassan II						
Madame		Alaoui		+212-22-434429		Arabic
Mr.		Alaoui		+212-22-437453/277018/23		English
Account : Fortis Bank Investment Banking						
De heer		Jan Oosten		020-527.13.10		Dutch
De heer		Jan Oosten				Dutch
Account : Gecon-Deta Detachering BA						
De heer	F.	Geyselaers				Dutch
De heer	R.	Geyselaers		043-3255400		Dutch

2. Click **Validation** to merge these contacts. You will see the following page:

Accounts: Doubles - Account (Contacts)

Close Refresh Reset Merge Automatic

Criteria

Division 000 — Exact Holding N.V. Classification

Reseller

Account: Type

Account: Status

Matched ☒ First + Middle + Last ☐ First + Last ☐ Last

Inactive ☐

Match (Gender) ☐


Title	Initials	Contact	Main	Phone	E-mail	Language	Source	Target
Account : BDO CampsObers, Information technology								
De heer		J.M. Suerink					<input type="checkbox"/>	<input type="radio"/>
Mr.		J.M. Suerink		010-2424680			<input type="checkbox"/>	<input type="radio"/>
Account : BMCI Bank Agence Casa Hassan II								
Madame		Alaoui		+212-22-434429		Arabic	<input type="checkbox"/>	<input type="radio"/>
Mr.		Alaoui		+212-22-437453/277018/23		English	<input type="checkbox"/>	<input type="radio"/>
Account : Fortis Bank Investment Banking								
De heer		Jan Oosten		020-527.13.10		Dutch	<input type="checkbox"/>	<input type="radio"/>
De heer		Jan Oosten				Dutch	<input type="checkbox"/>	<input type="radio"/>

3. Select the respective check box in the **Source** column if you want to copy any information from the contact, and then delete it after merging. If you want the other contact information to be merged to this contact and retained after merging, select the option in the **Target** column.

Note:

For each account with multiple contacts, you can only select one option in the **Target** column, whereas you can select more than one option in the **Source** column.

4. Click **Merge** to confirm the merging of the duplicate entries. A message “Confirm: Merge” will be displayed.



Confirm: Merge

Yes No

5. Click **Yes** to confirm the merging. The information from the source will be copied to the target and the source will be deleted. Only information that is not available at the target will be copied from the source. Click **No** to cancel the merging.
6. Click **Close** to exit.

3.5 FOLLOWING-UP ON ACCOUNTS

Now that you have captured the accounts together with the respective contact information in Exact Synergy Enterprise, you can utilize the account and contact information to follow-up on your current and prospective customers.

3.5.1 Changing account types

As a result of your sales and marketing activities, you would have acquired a large number of accounts from various marketing activities, such as acquiring the database of target customers, customer surveys, and promotions. Typically, these potential customers are called suspects within the sales cycle.

Initially, you will introduce your company, products, or services to a suspect. Having started communications with the suspect, the suspect will then become a lead. If the lead shows a strong interest in your products and services, the lead will advance to become a prospect. At this stage of the sales cycle, you will be creating quotations, coming up with proposals, and holding negotiations with the prospect to finalize business deals. When the prospect purchases your products and/or subscribes to your services, you will gain a new customer.

In Exact Synergy Enterprise, you can change the type of accounts as required from time to time. There are 10 types of accounts defined for you to use to classify your accounts. The following account types are available:

- **Associate** — This type of account is used to describe a person or company who has a special non-product relationship with your company. Some examples include members of the board, investors, and competitors.
- **Bank** — This type of account is used to describe a special supplier of financial services to your company.
- **Customer** — This type of account is used to describe a person or company that has purchased your products or services. There are three ways to create a customer account, as stated in the following:
 - Changing a **Prospect** account to a **Customer** account, and then entering the debtor code. For more information, see *Chapter 3.5.4 Assigning debtor codes*.
 - Creating a contract for the **Prospect** account.
 - Creating a **Customer** account.
- **Division** — This type of account is used to describe a part of your company, which has its own legal responsibility, and its own administrative, and functional autonomy.
- **Lead** — This type of account is characterized by the business activities executed after the initial contact, such as meeting and presenting your products and services to a person or company.
- **Not validate** — This type of account is used to describe an account that should be validated before it is changed to a different type.
- **Prospect** — This type of account is used to describe a person or company that has expressed a strong interest in your products and services. You can use a sales forecast request to capture the demand from this potential customer.
- **Reseller** — This type of account is used to describe a person or company that has a relationship or contract with your company to sell and support your products and services. The contract states what is expected of the reseller and what the reseller will receive in return for supporting and selling your products and services. Also, resellers may manage other indirect sales channels and customer accounts with the status **Active** and **Reference**.
- **Supplier** — This type of account is used to describe a person or company that has a relationship or agreement with your company to deliver one or more products and services to your company.
- **Suspect** — This type of account is used to describe a person or company that has the potential to become your customer in the future. You may have acquired these accounts through various marketing activities, such as acquiring the database of target customers, customer surveys, and promotions.

To modify account types (except for reseller and customer accounts), function right **291 — Allows to edit account type, except reseller and customer** is required. Users with the **Controller** and **Customer manager** roles have this function right.

To modify account types from **Customer** to **Reseller**, function right **406 — Allows to change account type from customer to reseller** is required. Users with the **Reseller manager** role have this function right.

To change account types for accounts:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant search criteria, and then click **Show**. On the search results page in the **Account name** column, click the name of the relevant account. Next, click **Edit**. You will see the following page:

Marketing

Type

Customer

Since

19-01-1998

Status

Active

Since

27-09-2011

Security level

10

Classification

SE

Small Enterprise

Rating / Source

6

6

I — Import

Sector

G-1

G- Retail Trade

Subsector

Size

P0001

1 employee

Chamber of Commerce number

Document

Exclude from merging

2. Under the **Marketing** section at **Type**, select a different type of account.
3. Click **Save** to change the type of account, and then click **Close** to exit.

3.5.2 Changing account statuses

There may be customers, prospects, leads, suspects, and other accounts that will discontinue doing business with you over time. This could be due to fact that the accounts have found more competitive suppliers or are dissatisfied with your products or services. As for leads and suspects, they may not advance to become prospects or customers should they choose products and services that are provided by your competitors. Thus, you may need to update the statuses of these accounts on the account card from time to time.

The following statuses are available for your accounts:

- **Active** — This status is used to indicate that the account has an active business relationship with your company.
- **Blocked** — This status is used to indicate that no transactions are currently allowed for this account.
- **Inactive** — This status is used to indicate that no transactions are allowed for the account and that the account is no longer doing business with your company.
- **Not validated** — This status is used to indicate that the account is not validated yet and has not been categorized as a specific account type.
- **Passive** — This status is used to indicate that the account has purchased your products or subscribed to your services. However, the account has since stopped making further contributions to your company's revenue.
- **Pilot** — This status is used to indicate that the account is using products or services that have not been commercially released by your company.
- **Reference** — This status is used to indicate a customer or reseller account that is extremely satisfied with your products or services.

Different statuses are available should you need to change the status of an existing account when you are editing the account card. However, the change of status depends on the type of account. The types of statuses that you can select when making the status change for each account type is shown in the following table:

Account type	Status
Associate	Active, Inactive
Bank	Active, Inactive, Blocked
Customer	Active, Inactive, Passive, Blocked, Pilot, Reference
Division	Active, Inactive
Lead	Active, Inactive
Not validated	Not validated
Prospect	Active, Inactive
Reseller	Active, Inactive, Blocked, Reference
Supplier	Active, Inactive, Blocked
Suspect	Active, Inactive

To modify the status of accounts except customer and reseller accounts, function right **294 — Allows to edit status of account except customer and reseller** is required. Users with the **Customer manager** role have this function right.

To modify the status of customer accounts, function right **292 — Allows to edit status of customer account** is required. Users with the **Customer manager** role have this function right.

To modify the status of reseller accounts, function right **293 — Allows to edit status of reseller account** is required. Users with the **Reseller manager** role have this function right.

To change statuses of accounts:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant search criteria, and then click **Show**. On the search results page in the **Account name** column, click the name of the relevant account. Next, click **Edit**. You will see the following page:

Marketing

Type	Customer	▼
Since	19-01-1998	
Status	Active	
Since	27-09-2011	
Security level	10	
Classification	SE	Small Enterprise
Rating / Source	6	6 I — Import
Sector	G-1	G- Retail Trade
Subsector		
Size	P0001	1 employee
Chamber of Commerce number		
Document		
Exclude from merging	<input type="checkbox"/>	

2. Under the **Marketing** section at **Type** and **Status**, you will see the type and current status of the account. Depending on the type and status of the account, you will see the following buttons: **Active**, **Blocked**, **Inactive**, **Not validated**, **Passive**, **Pilot**, and **Reference**. Click the relevant button to change the status of the account. The page will automatically exit and the change will be saved.

3.5.3 Viewing all activities and correspondence related to the accounts

You can manage your accounts by keeping track of the business transactions, sales and marketing activities, and correspondence related to the accounts. Customers may be allowed access to your Exact Synergy Enterprise database to create purchase requests, obtain product information, request for support, and update their account details. Thus, the request links, request reports, requests graph, activity reports, and the documents attached to the account can be used to keep track of your customers.

If you have defined the customer portal, you may want to track the usage frequency and the reasons why the customer portal is used. This is because customers, who access your Exact Synergy Enterprise database, can be allowed to perform a variety of functions, such as the following:

- Create, search, and view documents.
- Create, search, and view requests that contribute to the workflow.
- View financial data and reports related to the account and its child accounts.
- Modify the customer's own account card information.

For more information about the customer portal, see *Chapter 7.2 Customer Portals*.

Viewing activities

You can trace the activities of your accounts using reports that are available in Exact Synergy Enterprise. The activity reports allow you to view a list of documents and requests that have been recently viewed or created by the account. It also provides information on the accounts that are currently logged on to the system and which application page a specific user is using at a specific time and date.

To view accounts, function right **524 — View account card** is required. Users with the **Customer manager** role have this function right.

To view activities related to accounts:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant search criteria, and then click **Show**. On the search results page in the **Account name** column, click the name of the relevant account. You will see the following page:

Note:

If the **Activity** section is not displayed, click  **Customize** on the account card and select **Activity** and the required items, such as the **Read – Recent** and **Log: Application** check boxes under the **Activity** section to be displayed.

Activity	
	Read - Recent Log: Application

2. Under the **Activity** section, click **Read - Recent** to view a report on the past activities of the account. This report allows you to track activities related to the account, such as creating and viewing documents, requests, and account information. Click **Close** to return to the account card after you have finished viewing the report.
3. Click **Log: Application** to view a report on the application log, which contains information on the applications that are currently being accessed and the historical data of the applications that have previously been accessed. Click **Close** to return to the account card after you have finished viewing the report.
4. Click **Close** on the account card to exit.

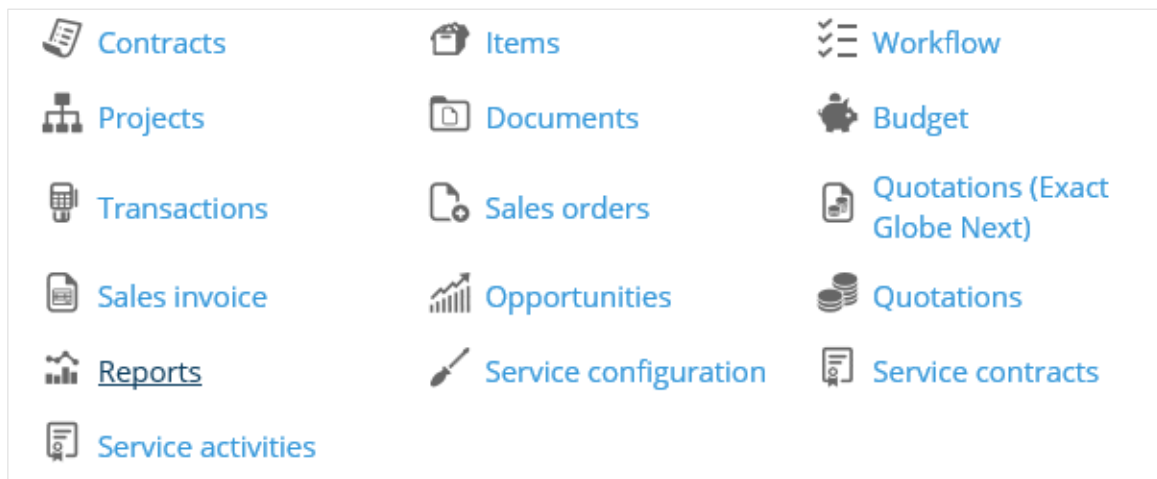
Viewing correspondence

Using the account cards as a single and main point of information, you can also keep track of all correspondence related to the account. You are able to link e-mails, business proposals, and quotations in the form of documents in Exact Synergy Enterprise. In addition to that, you can link a contract for the account to the account card itself, access requests that are relevant to the account directly from the account card, view all related opportunities, and view all transactions that are registered for the accounts.

To view accounts, function right **524 — View account card** is required. Users with the **Customer manager** role have this function right.

To view correspondence for accounts:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant search criteria, and then click **Show**. On the search results page in the **Account name** column, click the name of the relevant account. You will see the links that allow you to access other entities in Exact Synergy Enterprise related to the account, as displayed in the following:



2. Click **Contracts** to view all contracts signed with the customer. You will see a list of contracts if there are contracts linked to the account.
3. Click **Workflow** to get a complete list of all sales cycle activities in the workflow of the account. You will see a list of requests that may include checked tasks, tasks, and appointments. On the **Workflow** page, you can also specify the report criteria under the **Criteria** section, and then click **Refresh** to display only the requests you want to see.
4. Click **Documents** to view the documents created for the account, such as quotations, proposals, and presentation materials.
5. Click **Transactions** to view all transactions for the account.

Requests				
	23.988.241	07-04-2011 17:22	Open	AppointmentWRAE
Creator:		Wai Ting Yong	Person:	Wai Ting Yong
: [Yong179862 07-04-2011 17:22 (GMT +08:00)] Gathering for Project Hulk. ...				
:				

6. Under the **Requests** section, you will see a list of requests that are linked to the account. These requests are listed in descending order (from most current to the earliest) by the created dates. Click the request ID link to take action on the relevant requests.





Note:

You will only see the requests if there are requests linked to the account.

Requests: Reports

[Hours / Quantity / Amount](#)
[Quality analysis](#)

7. Under the **Requests: Reports** section, click **Quality analysis** to view a report of the number of requests per request type and the total duration taken to complete the task. The following page is an example of the analysis of your requests:

Requests: Quality analysis			   	
Close Search Reset				
Statistics Request typesCount + Duration			Account: 2545229 — 3A	
			Page size	<input type="text" value="15"/> Show
Request types ▲▼	Count ▲▼	Hours (Average): Created -> Completed ▲▼		
Administrative question	1	119,8		
Checked task	3	6,3		
Contact Support	1	2,6		
Functional question	2	0,8		
I Need	11	7.142,3		
License name change	1	2,0		
Price Agreement	2	0,5		
Sales question/call	3	1.112,3		
Task (Copy)	3	293,9		
Test/exam planning	17	169,5		
Web Sales	1	4,6		

8. Click **Hours / Quantity / Amount** to view a report of the number of requests per type. The following page is an example of the report of the number of requests per type:

Requests: Hours / Quantity / Amount

Close

Search

Reset

Group by Request types

Planned / Realized Planned

Account 2545229 — 3A

Page size

15

Show

Request types ▲▼	Count ▲▼
Administrative question	1
Checked task	3
Contact Support	1
Functional question	2
I Need	11
License name change	1
Price Agreement	2
Product Enhancement Request	1
Sales question/call	3
Task (Copy)	3
Test/exam planning	17
Web Sales	1

9. In the **Count** column, click the number to display the requests for a specific month in the workflow of the account. The following page is a sample of the requests in a workflow of an account:

Workflow: Search - Requests

Type

91 — Web Sales

Status: Exclude

Rejected

Account

2545229 — 3A

Page size

15

Show

Created	Creator	Description	Type	Person	Account	Item 1	Status
21-10-2004	ExactWebGuest	Web Request	Web Sales		3A		Realized

10. Click **Close** to exit.

3.5.4 Assigning debtor codes

When an order has come through from a prospect, your prospect becomes your customer. Before you are able to change a **Prospect** account to a **Customer** account, you need to link the **Prospect** account to a debtor code.

A debtor code is used to store financial transactions of this customer in your back office. When you directly create a **Customer** account, a debtor code will be generated automatically. You do have the options to change the debtor code at the moment of creation.

To assign a debtor code, function right **564 — Maintain division debtor** is required. Users with the **Controller**, **F&A staff**, and **Customer manager** roles have this function right.

To assign debtor codes to Prospect accounts:

1. Go to Modules → Customers → Reports → Accounts → Search. Under the **General** section at **Type**, select **Prospect**. Define the relevant search criteria, and then click **Show**. On the search results page in the **Account name** column, click the name of the relevant account. The account card will be displayed.
2. Under the **Divisions** section, click **New: Debtor code**.

Code - Division	Main
-----------------	------

3. The **Accounts: New - Debtor code** page will be displayed. Under the **Account** section, type the code at **Debtor code**.

4. Click **Save** to save the debtor code.

3.6 ACTIVATING AND EXPLORING THE PERSON (OR NATURAL PERSON) FEATURE

Exact Synergy Enterprise product update 250 introduced a new functionality for accounts and contacts, called **Person** (or **Natural person**). With the **Person** or **Natural person** feature, business relationships are no longer limited to Business-to-Business (B2B) but have also been extended to the Business-to-Consumer (B2C) markets.

Person (or **Natural person**) is a separate entity which supports registrations of people in Exact Synergy Enterprise where it comprises of two basic types: a person account (being a customer/supplier) and the contact person of a company account that you are doing business with.

Hence, you will be able to create an account based on a company in Exact Synergy Enterprise, and an account based on a person. Furthermore, you can leverage on the CRM information through the contact persons of company-based accounts to provide you insights to the people who are involved in the businesses.

To edit account codes, function right **411 – Allows to modify the account code** is required. Users with **Customer manager** or **Administrator** role have this function right.

To view inactive customer accounts, function right **289 – View inactive customer accounts** is required. Users with **Customer manager** role have this function right.

To edit account types except for reseller and customer accounts, function right **291 – Allows to edit account type, except reseller and customer** is required. Users with **Customer manager** role have this function right.

To edit the status of customer accounts, function right **292 – Allows to edit status of customer account** is required. Users with **Customer manager** role have this function right.

To edit the status of accounts except for customer and reseller accounts, function right **294 – Allows to edit status of account, except customer and reseller** is required. Users with **Customer manager** role have this function right.

To display account fields, function right **430 – Maintain CRM account field visibility** is required. Users with **Administrator** role have this function right.

To customize account cards, function right **498 – Allows to update the company wide account card customization** is required. Users with **Administrator** role have this function right.

To view, create, and modify database hosting of accounts, function right **344 – Maintain database hosting settings** is required. Users with **Administrator** role have this function right.

To view and modify the background rating application, function right **337 - Allows to execute background rating application** is required. Users with **Customer manager** and **Administrator** role have this function right.

To delete accounts, function right **355 – Allows to delete accounts** is required. Users with **Customer manager** role have this function right.

3.6.1 Activating Person (or Natural person) feature

The **Person** (or **Natural person**) feature requires activation before person accounts can be created. The **Person** (or **Natural person**) feature can also be linked to contact persons. To define account settings, function right **222 – Maintain CRM settings** is required. Users with **Administrator** or **Customer manager** roles have this function right.

To activate the Person (or Natural Person) feature:

1. Go to Modules → Customers → Setup → Other → Settings.
2. Click **Edit**.
3. Under the **Persons** section, select the **Natural persons** check box. By default, this check box is selected.

Persons

Natural persons ☒

4. Click **Save**, and then **Close** to exit.

3.6.2 Creating Person (or Natural person) accounts

You can create accounts based on a person, namely customer person accounts, prospect person accounts, and supplier person accounts.

To create Person (or Natural Person) accounts:

1. Go to Modules → Customers → Entry → Entry → Account.

Select: Type

Close

Type: Company	Policy
Prospect	
Customer	
Associate	
Supplier	
Reseller	
Division	
Bank	
Lead	
Suspect	
Type: Person	Policy
Prospect	
Customer	
Supplier	

2. On the **Select: Type** page, select the required type of account under the **Type: Person** section. The account type that is displayed on the title page varies, depending on the type of account you have selected. A person account can be **Prospect (Person)**, **Customer (Person)**, and **Supplier (Person)**. The following **Accounts: Customer (Person)** page will be displayed, if you have selected **Customer** under the **Type: Person** section.

Accounts: Customer (Person) Created by Jo-Anna Goh Li Ping 06-07-2015 15:33

[Close](#) [Save](#)

General Title <input type="text" value="MR"/> Mr. First name <input type="text"/> Middle name <input type="text"/> Last name <input type="text"/> Address <input type="text"/> Zip code / City <input type="text"/> Country / State <input type="text" value="MY"/> Malaysia Mobile <input type="text"/> Phone <input type="text"/> E-mail <input type="text"/>	Picture Upload <input type="text"/> Browse... Remarks <div style="border: 1px solid #ccc; height: 100px;"></div>
--	---

[Timestamp](#) [Full screen](#)

Marketing Code / Status <input type="text" value="390321"/> Active Type / Since Customer 06-07-2015 Classification <input type="text" value="CA"/> Corporate Account
--

Financial Division <input type="text" value="036"/> Exact Asia Development Customer code <input type="text" value="390321"/> Bank account <input type="text" value="Default bank account type"/> IBAN <input type="text"/> BIC code <input type="text"/>
--

3. Define the required fields, and then click **Save** to save the person account information. A customer person account has been created, as shown in the following:

Accounts: Customer (Person): 390321, Joshua Cheng Created by Jo-Anna Goh Li Ping 06-07-2015 15:33
Modified by Jo-Anna Goh Li Ping 06-07-2015 15:35

[Close](#) [Save](#) [Delete](#) [Reference](#) [Blocked](#) [➤](#)

General Title <input type="text" value="MR"/> Mr. First name <input type="text" value="Joshua"/> Middle name <input type="text"/> Last name <input type="text" value="Cheng"/> Address <input type="text" value="7 Ulong Street"/> Zip code / City <input type="text"/> Country / State <input type="text" value="NL"/> Netherlands Phone <input type="text"/> Mobile <input type="text"/> E-mail <input type="text"/>	Picture Upload <input type="text"/> Browse... Remarks <div style="border: 1px solid #ccc; height: 100px;"></div>
---	---

[Timestamp](#) [Full screen](#)

Marketing Code / Status <input type="text" value="390321"/> Active Type / Since Customer 06-07-2015 Classification <input type="text" value="CA"/> Corporate Account
--

Financial Division <input type="text" value="036"/> Exact Asia Development Customer code <input type="text" value="390321"/> Bank account <input type="text" value="Default bank account type"/> IBAN <input type="text"/> BIC code <input type="text"/>
--

Note:

Unlike the company-based accounts, the **Contacts** section will not be displayed in a person account card. Instead, the **Links** section displays all linked accounts and contacts of this person.

3.6.3 Adding contacts to Person (or Natural person) accounts

To add contacts to Person (or Natural person) accounts:

1. Go to Modules → Customers → Reports → Accounts → Search. Under the **General** section, select the **Person** check box at **Account: Type**. Define other required search criteria and click **Show**. On the **Accounts: Search** page, click the required person account hyperlink in the **Account name** column.
2. On the person account card, click **Add** under the **Links** section.

Type	Account	Job description	Phone	Mobile	E-mail
------	---------	-----------------	-------	--------	--------

3. On the **Select: Type** page, select **Add contact person to an account**.

Type	Policy
Add contact person to an account	

4. On the **Add contact person to an account** page under the **Account** section, select the required account for which you want to add the contact person.

Account
Select the account you want to link this person to

Account

Copy
Select the person specific data you want to copy

E-mail ☐

Mobile ☐


Phone ☐

Fax ☐

- Once the account is selected, Exact Synergy Enterprise will check if the information entered matches any of the existing contacts on the person account card. When no match is found, the following page will be displayed, requesting you to select the information from the contact card that you want to be copied to the person account card.

Add contact person to an account ?

Account
Select the account you want to link this person to

Account  t Bierhuis *Parike*

Copy
Select the person specific data you want to copy

E-mail ☐

Mobile ☐

Phone ☐

Fax ☐

[Confirm](#) [Cancel](#)

- Click **Confirm** to accept the selections. Exact Synergy Enterprise will redirect you to the contact card in the edit mode. Some of the fields are prefilled with the information copied from the previous step. These fields can be amended. Define the other fields.

Contact: New

[Close](#) [Save](#)

Supplier **Aegon**
Status: **Active** Rating: **7**
Created by **Dion Brands** 24-11-2015 13:44
Modified by

Contacts

Title **MS** [MS.](#)

Initials

First name **Camen**

Middle name

Last name **Smith**

Suffix

Job description --

Job title

Phone **34 90000000**

Extension

Mobile **012-2525333**

Fax

E-mail

Valid email address ☐

Email permission ☐

Language **EN** [English](#)

Main ☐

Remarks

User name

[Timestamp](#) [Full screen](#)

7. Click **Save**. The person contact card (view mode) will be displayed. Under the **Links** section, you will be able to view all the accounts linked to this person.

Links Add					
Type	Account	Job description	Phone	Mobile	E-mail
Contact	' SPRESSO	--	34 90000000	012-2525333	carmensmith@gmail.com
Contact	Carmen Smith	--			
Customer	602673	--	34 90000000	012-2525333	carmensmith@gmail.com
Supplier	602709	--	34 90000000	012-2525333	carmen_eventplanner@hotmail.com

Note: You can also add contacts to accounts from contact cards by clicking **Add** under the **Links** section on the contact card.

3.6.4 Registering person accounts for prospects, customers or suppliers

At times, you may have customer person accounts as suppliers and vice versa.

To register person accounts for prospects, customers, or suppliers:



- Go to Modules → Customers → Reports → Accounts → Search. Under the **General** section, select the **Person** check box at **Account: Type**. Define other required search criteria and click **Show**. On the **Accounts: Search** page, click the required person account hyperlink in the **Account name** column.
- On the person account card, click **Add** under the **Links** section. Depending on the current type of the person account, the availability of the account type registration options may differ. Customer person accounts can be registered as supplier person accounts, as shown in the following.
- On the **Select: Type** page, select **Register as a supplier**.

Select: Type

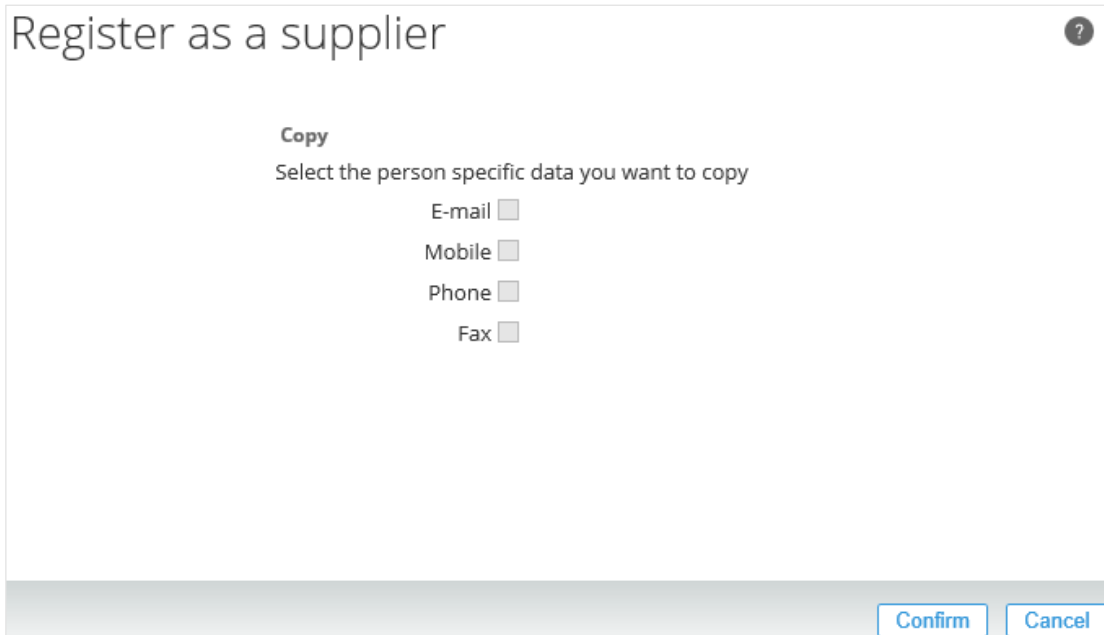
☆

?

Close

Type	Policy
<div><div></div><div>Add contact person to an account</div></div>	
<div><div></div><div>Register as a supplier</div></div>	

4. On the **Register as a supplier** page, select the required contact information with which you want to create the person account card. In this case, it is the supplier person account.



Register as a supplier ?

Copy
Select the person specific data you want to copy

E-mail ☐

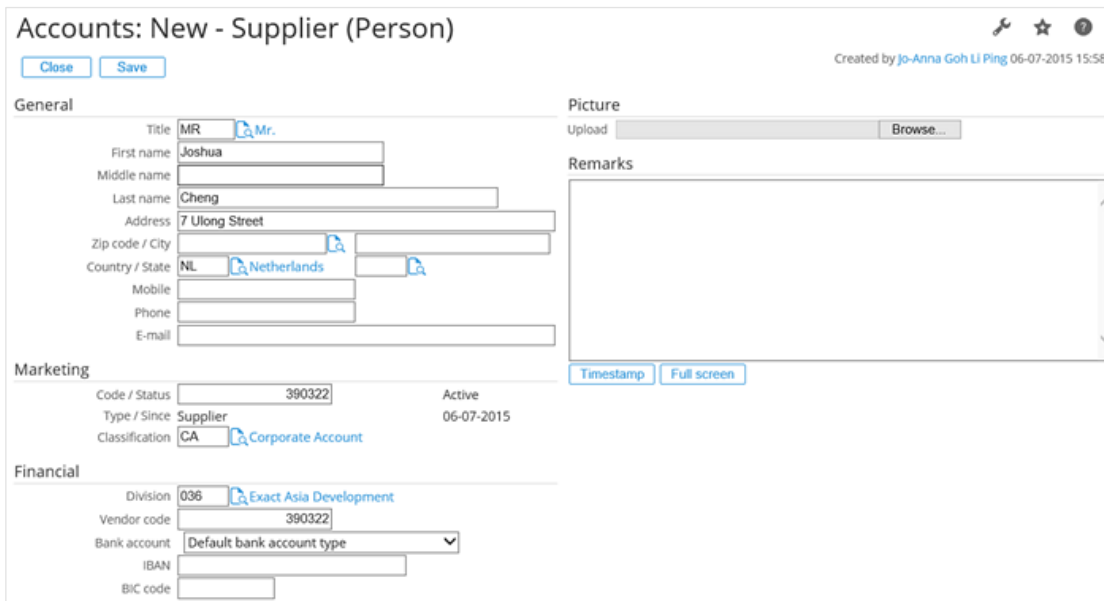
Mobile ☐

Phone ☐

Fax ☐

Confirm **Cancel**


5. Click **Confirm** to accept the selections. Exact Synergy Enterprise will redirect you to the person account creation page. The following is an example of a supplier person account creation page. Some of the fields are prefilled with the information copied from the previous step. These fields can be amended.



Accounts: New - Supplier (Person) ⚙️ ⭐ ?
Created by Jo-Anna Goh Li Ping 06-07-2015 15:58

Close **Save**

General

Title  Mr.



First name

Middle name

Last name

Address

Zip code / City

Country / State  Netherlands 

Mobile

Phone

E-mail


Picture
Upload **Browse...**

Remarks


Marketing

Code / Status Active


Type / Since 06-07-2015

Classification  Corporate Account

Financial

Division  Exact Asia Development

Vendor code

Bank account 

IBAN

BIC code

Timestamp **Full screen**

- Click **Save**. The person contact card (view mode) will be displayed. Under the **Links** section, you will be able to view all the accounts linked to this person.

Accounts: Supplier (Person): 390322, Joshua Cheng

Close Edit Actions Mail merge

Created by Jo-Anna Goh Li Ping 06-07-2015 15:58
Modified by Jo-Anna Goh Li Ping 06-07-2015 15:59

General	Divisions
<p>Name Joshua Cheng -</p> <p>Address 7 Ulong Street</p> <p>Postcode / City</p> <p>Country / State Netherlands (NL)</p> <p>Phone</p> <p>Mobile</p> <p>E-mail joshuacheng@gmail.com</p> <p>Gender Male</p>	<p>Code - Division Main</p> <p>390322 - 001 Demo ✓</p> <p>Workflow Documents Transactions</p> <p>Quotations Experience</p>
Marketing	Links
<p>Code / Status 390322 Active</p> <p>Type / Since Supplier 02-10-2015</p> <p>Classification Restaurant</p>	<p>Type Account Job description Phone Mobile E-mail</p> <p>Customer 60131 --</p> <p>Supplier 390322 -- joshuacheng@gmail.com</p>
Financial	Remarks - None
<p>A/P EUR 0.00</p> <p>Bank account</p> <p>IBAN</p> <p>BIC code</p>	<p>External References</p> <p>Type Link</p>

Note:

You can also register person accounts for prospect, customer, or supplier person accounts from contact cards by clicking **Add** under the **Links** section on the contact card.

3.6.5 Removing the linked accounts from Person (or Natural person) accounts

To remove the linked accounts from the person accounts:

- On the person account card, click **Edit**, and then click **Unlink**. Alternatively, on the contact card, click **Edit**, and then click **Unlink**, as shown in the following:

Accounts: Supplier (Person): 390322, Joshua Cheng

Close Save Delete Blocked Inactive **Unlink**

Created by Dion Brands 24-11-2015 15:53
Modified by Dion Brands 24-11-2015 15:53

General	Picture
<p>Title MR Mr.</p> <p>First name Joshua</p> <p>Middle name</p> <p>Last name Cheng</p> <p>Address 7 Ulong Street</p> <p>Postcode / City</p> <p>Country / State NL Netherlands</p> <p>Phone</p> <p>Mobile</p> <p>E-mail</p>	<p>Upload Browse...</p>
Marketing	Remarks
<p>Code / Status 390322 Active</p> <p>Type / Since Supplier 24-11-2015</p> <p>Classification RES Restaurant</p>	<p>Timestamp Full screen</p>
Financial	
<p>Division 001 — Demo</p> <p>Creditor code 390322</p> <p>Bank account Default bank account type</p> <p>IBAN</p> <p>BIC code</p>	

Note:

Once unlinked, the following processes will happen:

- On the person account card, the contact will be removed from the **Links** section.
- The contact card will revert from the edit mode to the view mode.

The contact card will revert from the edit mode to the view mode.

3.7 REPORTS

There are a number of reports available in Exact Synergy Enterprise that can be used to manage your accounts. With these reports, you can also define the criteria for your reports in order to gain more specific information about your accounts.

3.7.1 Accounts-sector reports

The accounts-sector report gives you an overview of the accounts based on the sectors that they belong to. You can use this report to view the distribution of the sectors for all types of accounts.

All users can access the accounts-sector report.



To generate reports for accounts by sector:

1. Go to Modules → Marketing → Reports → Customers → Sectors. Define the relevant criteria, and then click **Show**. The following page is an example of the results depending on the criteria defined:

<div> <div>Close</div> <div>Refresh</div> <div>Reset</div> </div>				
Criteria				
Division	<input type="text"/>	Continent	<input type="text"/>	
Region	<input type="text"/>	Country	<input type="text"/>	
Type	<input type="text"/>	Status	<input type="text"/>	
Sector	<input type="text"/>			
Description	Graph	%	Count	
A- Agriculture, Forestry And Fishing		1.74	12554	
B- Mining		0.13	932	
C- Construction		6.13	44341	
D- Manufacturing		22.61	163448	
E- Transportation, Communications, Electric, Gas And Sanitary Services		2.60	18801	
F- Wholesale Trade		4.68	33832	
G- Retail Trade		3.56	25751	
H- Finance, Insurance, And Real Estate		3.60	25993	
I- Services		17.73	128192	
J- Public Administration		5.89	42613	
Need to Determine		6.55	47354	
Standaard sector		0.00	6	
Unknown		24.77	179036	
Utilities		0.00	23	

2. In the **Description** column, you will see an overview of sectors and accounts that are grouped according to these sectors. For each sector, you can see the percentage of accounts in the **%** column, and the number of accounts in the **Count** column. The graphical representation of the percentage and the number of accounts for a sector relative to the other sectors are shown in the **Graph** column.
3. Click **Close** to exit.

Note:

To save a copy of the report in a Microsoft Excel sheet, click  **Export: Excel** at the title bar. In the **File Download** box, click **Save**. To print a copy of the report, click  **Printable** at the title bar.






3.7.2 Accounts classification reports

You can use this report to get an overview of your accounts that are grouped by the classification of their business. This is useful for you to know to which classification a majority of your suspects, leads, prospects, and customers belong to. You can then formulate better marketing strategies and design products and services that cater to your customer's needs.

All users can access the accounts-classification report.



To generate reports for accounts by classification:

1. Go to Modules → Marketing → Reports → Customers → Classifications. Define the relevant criteria, and then click **Show**. The following page is an example of the results depending on the criteria defined:

Accounts - Classifications					
<div> <div>Close</div> <div>Refresh</div> <div>Reset</div> </div>					
<div>Criteria</div> <div> <div>Division</div> <div>Region</div> <div>Account: Type</div> <div>Subsidiaries</div> </div> <div> <div>Continent</div> <div>Country</div> <div>Status</div> </div>					
Order	Description	Type	Graph	%	Count
0	Hotel	All		2.44	1
1	Restaurant	All		56.10	23
2	Café	All		2.44	1
3	Bedrijf	All		36.59	15
4	Particulier	All		2.44	1
Total				100	41

2. In the **Description** column, you will see an overview of classifications and the accounts that are grouped according to the respective classifications. For each classification, you can see the percentage of accounts in the **%** column and the number of accounts in the **Count** column. The **Type** column indicates the type of accounts that can be linked to the respective classifications. The graphical representation of the percentage and the number of accounts for a classification relative to the other classifications are shown in the **Graph** column.
3. Click **Close** to exit.

Note:

To save a copy of the report in a Microsoft Excel sheet, click  **Export: Excel** at the title bar. In the **File Download** box, click **Save**. To print a copy of the report, click  **Printable** at the title bar.

3.7.3 Accounts rating reports

You can get an overview of the amount of revenue generated by the contracts gained from doing business with your accounts. This is useful for you to measure your own sales cycle performance and also obtain a summary of the revenue earned from your current contracts. From this report, you can also view the revenue size that is most common for each type of account type. For example, you can see that customer accounts usually generate between EUR 100,000.00 to EUR 10,000,000.00 in revenue, which falls under Rating 1.

All users can access the accounts-rating report.

To generate reports for accounts by rating:

1. Go to Modules → Marketing → Reports → Customers → Ratings. You will see the following page:

2. At **View**, select **List** for a list of ratings that are linked to accounts grouped by the account type. Select **Pyramid** for a graphical representation of the ratings that are linked to accounts in the form of a pyramid, or **Pie** for a graphical representation of the ratings that are linked to accounts in the form of a pie chart.
3. Define the relevant criteria for the other fields and click **Show**.
4. Click **Close** to exit.

Note:

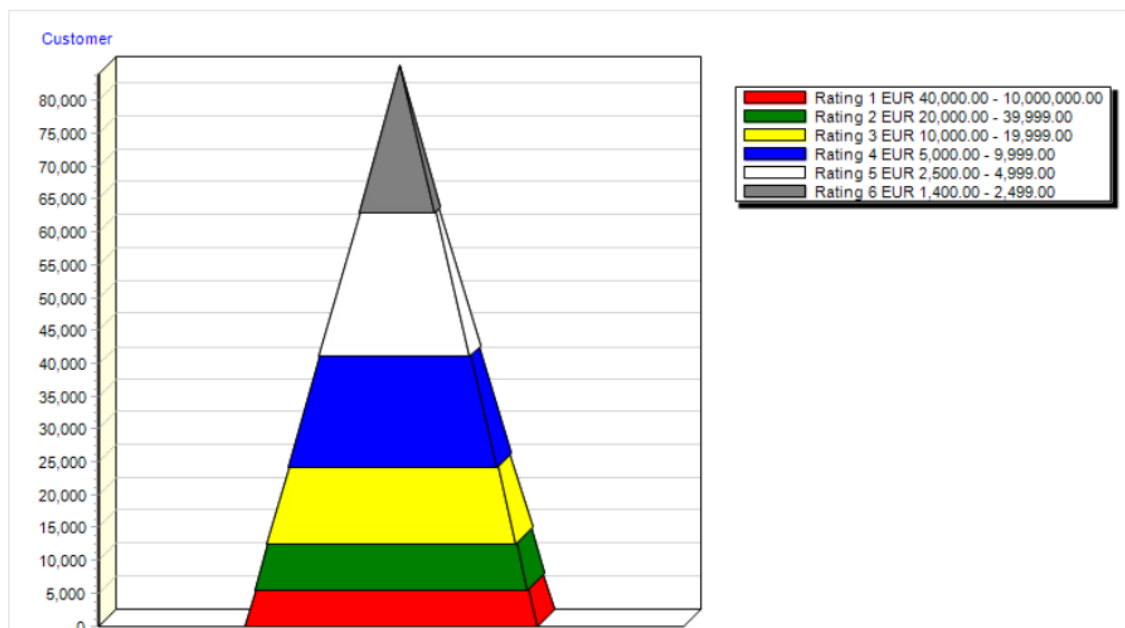
To save a copy of the report in a Microsoft Excel sheet, click **Export: Excel** at the title bar. In the **File Download** box, click **Save**. To print a copy of the report, click **Printable** at the title bar.

Examples of reports for accounts by rating

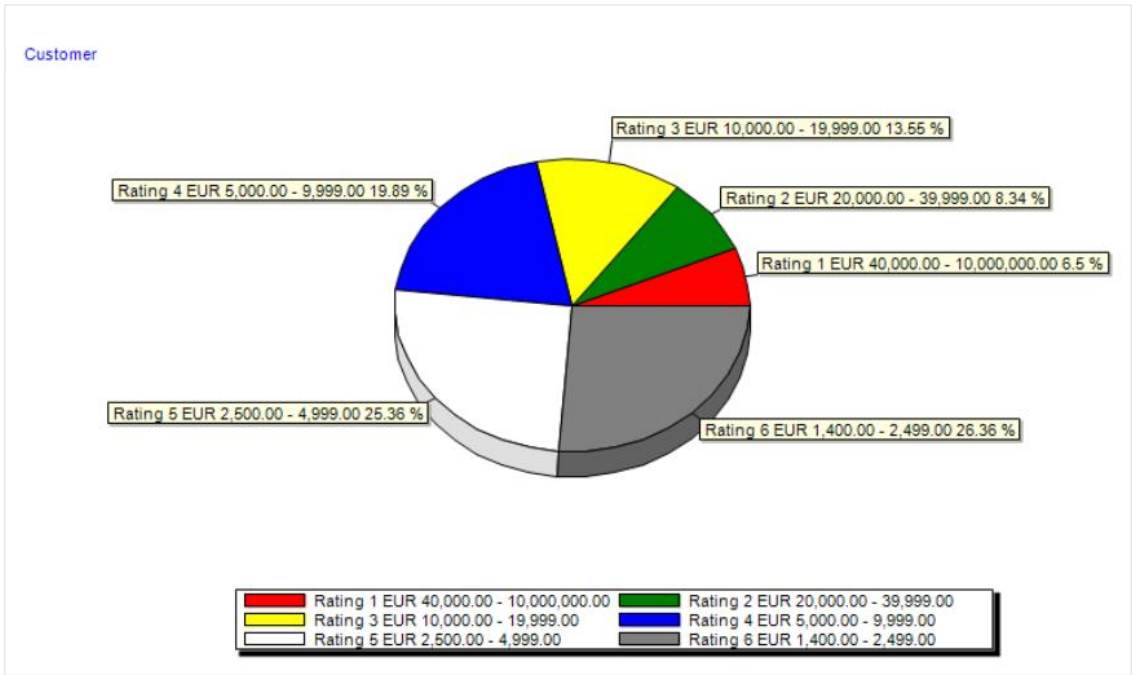
If you have selected the **List** view, you will see a list of ratings that are linked to accounts, grouped by the account type. The number of accounts linked will be displayed in the **Count** column and the percentage, in the **%** column.

Rating ▲▼	Value (EUR)	Count	%
Associate			
1		2,844	1.36
2		646	0.31
3		823	0.39
4		3,120	1.49
5		755	0.36
6		3,449	1.64
7		113,732	54.23
Bank			
1		8	0.00
7		179	0.09
Customer			
1	40,000.00 - 10,000,000.00	5,467	2.61
2	20,000.00 - 39,999.00	7,020	3.35
3	10,000.00 - 19,999.00	11,408	5.44
4	5,000.00 - 9,999.00	16,739	7.98
5	2,500.00 - 4,999.00	21,344	10.18
6	1,400.00 - 2,499.00	22,183	10.58
Total		209,717	

If you have selected the **Pyramid** view, you will see a graphical representation of the ratings that are linked to accounts in the form of a pyramid. Each segment of the pyramid represents a rating and each individual pyramid represents a single account type.



If you have selected the **Pie** view, you will see a graphical representation of the ratings that are linked to accounts in the form of a pie chart. Each segment of the pie represents a rating and each pie chart represents a single account type.



4. MARKETING CAMPAIGNS

Now that you have laid the foundation for your CRM strategy by entering your accounts into Exact Synergy Enterprise, it is time to look at how Exact Synergy Enterprise can support the processes for your CRM strategy.

As described in Chapter 2, the first processes of CRM are marketing and sales. This section will describe how Exact Synergy Enterprise can help you automate parts of those processes.

In general, it is hard to see every process shown in Chapter 2 as a separate process. This is because they all overlap with each other since they share that common goal of ensuring that you build a lasting relationship with your customer that is beneficial for both parties.

This section will describe one specific way of using your marketing and sales processes with Exact Synergy Enterprise and it is only one of the examples on how to use it.

We will start by describing the setup and execution of a marketing campaign. Then your sales force will follow up on the information gathered from that campaign and manage these responses. Next, we will discuss about newsletters and how it can be used to constantly inform customers and partners of the latest happenings.

After analyzing the responses obtained from the marketing campaign, the sales force will approach potential customers. This will be recorded as opportunities and will be discussed further in the next chapter.

Business benefits:

- Easy to manage multiple campaigns.
- Linking multiple target groups to a campaign makes it possible to use multiple channeling strategies.
- All campaign activities and actions are collected in a single place.
- Able to measure the success of a campaign by linking the campaign budget to the opportunities that materialized from the campaign.
- Easy to send out bulk e-mails or letters to all accounts that are linked to the campaign or target group.
- Create additional sales by informing customers about new or additional products.

4.1 PREPARING MARKETING CAMPAIGNS

Marketing is often the first step in getting your name out to the public. People need to know about the existence of your company and the kind of products and services that you have to offer. To reach this goal, you need to conduct marketing activities.

The first step in planning a marketing activity is to define your target group, for example manufacturing companies. You define a certain set of criteria, such as company size, geographical location, and number of employees that the target group needs to meet.

When you have defined those criteria, you can, for example, purchase addresses of companies that meet those criteria. In this case, we will assume that you have bought 500 addresses, which means there are 500 suspects.

4.1.1 Creating marketing campaigns

Now that a target group has been established and a number of suspects have been found from the addresses purchased, this has to be registered for future reference. Earlier in this manual, we described that the account card is the central point for all information and correspondence about that specific account.

You may want to have the same approach for each marketing campaign or event that you carry out. This allows you to quickly access all the required information in case you want to repeat a certain campaign or when you need some reference information for a new campaign. It will also give you a historic overview of your campaigns and the results of each campaign.

In Exact Synergy Enterprise, you use a project to collect all information about a certain marketing campaign.

With a project, you are able to manage your marketing event and plan all actions related to it. You are also able to link your target groups, all communications, mail merges, and letters for a campaign together.

To create a project, you need to have function right **311 — Allows to create new project**. Users with the **Project administrator** and **Production manager** roles have this function right.

To create projects:

1. Go to Modules → Projects → Entry → Entry → Project. You will see the following page:

Project: New

Close Save Save + New Copy

Created by Jo-Anna Goh Li Ping 06-07-2015 16:36

General

Type: Internal ☒ Register hours & costs on this project

Code:

Description:

Security level: Internal 10 ☐ Only visible to members

Manager: 175745

Start date — End date: 06-07-2015 — 06-08-2015

Status: Proposed

Use deliverables & WBS: ☐

Allow hour & expense entry for non-members: ☐

Contract

Account:

Division: 036

Parent:

Confirmation:

Invoicing method: 10

Financial

Cost center: 036SM002

Cost unit:

Your reference:

2. Under the **General** section, type a project code at **Code**.
3. Type a description for the project at **Description**.
4. At **Security level**, type or select the security type or security level for the project. If the project is only visible to the project members, select the **Only visible to members** check box.
5. Type or select the campaign manager at **Manager**.
6. At **Start date – End date**, type or select the planned start and end dates of the project. If you leave this blank, the system will fill in the current date as the planned start date and the same date of the next month as the planned end date.
7. Select the **Use deliverables & WBS** check box to use deliverables and work breakdown structure (WBS) for the project.

Note:

Once the check box has been selected, it cannot be cleared.

8. Select the **Allow hour & expense entry for non-members** check box to enable hour and expense entry on the project for the non-members.

9. Under the **Contract** section at **Account**, type or select an account to link the account to this project. This field is available only when you are creating or modifying a **Fixed, Time & Material**, or **Internal** project.
10. Type or select a project to link the project as a parent for this project at **Parent**. If you are creating a child project, this field cannot be edited as it will follow the name of the parent project. Once you select a parent project, the **Code** field will be prefilled by the system. However, if you have defined the code before selecting a parent project, the code will not be overwritten by the system.

Note:

Only **Active** and **Proposed** projects can be selected as a parent. By linking the projects, you can gain access to a high-level monitoring, which includes all the related projects in a single overview.

11. Click **Save** to create the project, and then click **Close** to exit.

Note:

- All fields with the "!" icon are mandatory.
- To activate your marketing campaign, open the project card again and select **Active** at **Status** under the **General** section.

4.1.2 Linking target groups to marketing campaigns

The next step is getting the addresses that you have purchased into Exact Synergy Enterprise and linking them to the marketing campaign.

You can easily upload accounts from a comma separated value (CSV) file or Microsoft Excel as described in *Chapter 3.3.3 - Import Wizard*. Normally, these accounts are uploaded as **Suspects**, which you can directly link to your marketing campaign.

Exact Synergy Enterprise allows you to link different target groups to a marketing campaign. You would do this if you want to treat the different target groups differently. For example, you can treat existing customers within a target group differently compared to suspects or potential customers for your yearly sales campaign.

You may want to send e-mails to your customers while sending letters to the suspects. Target groups are represented by child projects that are linked to a marketing campaign.

To create a child project, you need to have function right **311 — Allows to create new project**. Users with the **Project administrator** and **Production manager** roles have this function right.

To create child projects:

1. Go to Modules → Projects → Reports → Search → Projects. Define the relevant criteria to list the projects that are linked to a marketing campaign, and then click **Show**.
2. Select the required project by clicking the project code in the **Project** column. You will see the following page:

Project: .001.001.001.001.020 - V3V4Schrack Energietechnik

Close Edit Create letter Create email

Created by Catherina Stabenheimer 11-06-2002 12:21
Modified by Wen Da Ho 13-12-2011 13:33

General

Type Time & material
Code .001.001.001.001.020
Description V3V4Schrack Energietechnik
Security level Internal - 10
Manager Wen Da Ho
Start date — End date 01-03-2002 — 31-12-2002
Status Completed
Use drag-and-drop planning ☒
Use deliverables & WBS ☒
Allow hour & expense entry for non-members ☐

Contract

Ordered by Schrack Technik GmbH (HQ) - Austria - Customer - Active
Delivery to Schrack Technik GmbH (HQ) - Austria - Customer - Active
Contact person Mrs. Martina Mikolasch-Heinz
Parent CS2.001.001.001.001 — Conversion to Globe 2003 - Exact Austria, Active
Evaluation 01.349.017 — Add. to General Agreement
Contact person Mrs. Martina Mikolasch-Heinz
Confirmation 01.349.072 — Schrack - alle Dokumente - Hyperlinks-
Invoice to Schrack Technik GmbH (HQ) - Austria - Customer - Active
Proposal 01.341.399 — Final agreement Schrack approved by RR, addendum to General Contract
Contact person Mrs. Martina Mikolasch-Heinz
Invoicing method

Start up

Accounts
Activities & material
Rates
Deliverables & WBS lines
Budget

Execution

Planning
Hour & expense entry
Hour & expense approval
Invoice proposals
Workflow
Documents
Credit invoices

Reporting

Opportunities
Transactions
Invoices
Reports

Financial

Default currency EUR — Euro
Billing currency EUR — Euro
WIP method Percentage of completion of costs
Invoice to Account
Invoice proposal line grouping Project / Deliverable / Item
Your reference
Invoice proposal description
Globe Next description line 1
Globe Next description

3. Under the **Child projects** tab, click **New** to create a child project as described in *Chapter 4.1.1 Creating marketing campaigns*. The child project will be automatically linked to the marketing campaign.

4.2 RUNNING CAMPAIGNS

Now that you have created your campaign and determined which companies will be targeted, you can begin running your marketing campaign.

Currently, there are a great number of methods to communicate with target groups, such as via telephone calls, e-mails, regular mails, faxes, chat programs, and web sites. Exact Synergy Enterprise offers support for a number of those methods.

4.2.1 Running campaigns using mail merge

You can reach your target groups effectively by using the mail merge function or **Word Merge** function. For more information on the **Word Merge** function, see *Appendix F: Exact Word Merge*.

The mail merge layout will act as a template that includes account-specific information, such as the company name, address, and date. This document can then be sent to your target groups via e-mail or printed letter.

A mail merge layout in Exact Synergy Enterprise contains special tags that insert account-specific or contact-specific information into the document when it is generated. For example, the [BACO_CRMCompany.Name1] tag will be filled with the name of an account when you generate the document using the mail merge function.

To be able to perform a mail merge you need to first create a mail merge layout. This is described in *Appendix B: Creating Mail Merge Layouts*.

To execute a mail merge process, you need to have function right **160 — Allows mail merge from resource search**. Users with the **General manager**, **HR**, or **HR assistant** roles have this function right.

To execute a mail merge process:

1. Go to Modules → Customers → Reports → Accounts → Search. You will see the following page:

Accounts: Search ☆ ? ⚙

[Close](#) [Show](#) [Reset](#) [Contact](#) [Count](#) [>](#)

General [> Templates](#)

Type ☐ Associate ☐ Prospect ☐ Customer ☐ Supplier ☐ Reseller ☐ Division ☐ Bank ☐ Not validated ☐ Lead ☐ Suspect

Status ☐ Active ☐ Blocked ☐ Inactive ☐ Not validated ☐ Passive ☐ Pilot ☐ Reference

Account Type ☐ Company ☒ Person [Save](#)

Account

Name Code

Postcode City

Phone

Contact

Last name First name

Full name Contact: Phone

Only main contact

Financial

Customer code Creditor code

Debtor (Y/N) Creditor (Y/N)

Invoicing VAT number

View

Includes: Contacts (All) ☐

Type: Address

Columns

Account name	City	Contact: Last name	Contact: E-mail	Contact: Phone
--------------	------	--------------------	-----------------	----------------

Note:

The **Account: Type** field under the **General** section is displayed only if you have enabled the **Person** (or **Natural person**) feature. For more information, see *Chapter 3.6 Activating and Exploring the Person (or Natural Person) Feature*.

- Define the relevant criteria to select a target group, and then click **Show**. In this example, we will choose a target group that is linked to a marketing campaign. The following is a sample of search results based on the defined criteria:

Accounts: Search

Close Search Request Update accounts Opportunity Create letter Create email Export

Type: Customer
 Only main contact: Yes
 Customer (Y/N): Yes
 Type: Address Delivery

Page size: 99 Show

Account name	City	Contact: Last name	Contact: E-mail	Contact: Phone
' SPRESSO	LOVENDEGEM	Boekhouding		
' t Bierhuis *Parike*	Brakel (Parike)	Van Nieuwenhove		
' t Bloemenhof	ARENDONK	--		
' T Buskruid	Lummen	Vanstraelen		
' t Elfde gebod	IZEGEM	--		
' T Knutseltje	Essen	Van Wortel		
' t Kruimelke	HEUSDEN-ZOLDER	Gielen		
' T Nestje	Brugge	Herbots		
' T Penseeltje	HOVE	Andriessen		
' t Schooltje V. Oppem	MEISE	Bosmans		
' t Stukadoortje	Antwerpen	Goossens		
' T Trefpunt	TURNHOUT	Robert		
TURES DE LOS ANDES LTDA. TURA	ZIPAQUIRA	PABLO E SALCEDO	yeow.yuen.kai@exact.com	
IGO the resource company	OOSTERHOUT	Zeeuw		0162-374016

- Click **Mail merge** to execute the mail merge function.

Note:

When you create databases from product update 250 onwards, the **Mail merge** button will not be available. The **Word Merge** feature has replaced the mail merge functionality.

Existing users moving to product update 250 will still have the old mail merge functionality by default, and this can be switched to the new **Word Merge** functionality. For more information, see *Appendix F: Exact Word Merge*. When the **New Word Merge** check box is selected on the **Documents: Settings** page, the **Mail merge** button will not be displayed. Instead, the **Create letter** and **Create email** buttons will be displayed.

Mail merge

Close
Preview
Printable
Mail merge
Reset

Criteria

Layout: 00.236.435 [AA - Label Mail Merge](#)
Subject:
E-mail (To): ☒ Account ☐ Contact (Main) ☐ Contact (Selected) ☐ Contact (All)
Save: Documents ☒
Allow: Multiple ☒
Address: Type: Delivery

Sender

Default: ☒ noreply@exactsoftware.com (noreply@exactsoftware.com)
Person: ☐ E-mail (Not specified) (Jo-Anna Goh Li Ping)
Division: ☐ E-mail (Not specified) (Exact Asia Development)

Preview


Account: [a](#)
Contact: [a](#)

<input checked="" type="checkbox"/>	Account: Name	Contact: Last name	Account: Code	City	Contact: Full name
<input checked="" type="checkbox"/>	' SPRESSO	Boekhouding	962879	LOVENDEGEM	Boekhouding
<input checked="" type="checkbox"/>	' t Bierhuis *Parike*	Van Nieuwenhove	1633937	Brakel (Parike)	Jo Van Nieuwenhove
<input checked="" type="checkbox"/>	' t Bloemenhof	--	1634608	ARENDONK	--
<input checked="" type="checkbox"/>	' T Buskruid	Vanstraelen	1631662	Lummen	Kris Vanstraelen
<input checked="" type="checkbox"/>	' t Elfde gebod	--	1634941	IZEGEM	--

- The **Mail merge** page will be displayed. Under the **Criteria** section, type or select a predefined mail merge layout at **Layout**. For more details on creating a mail merge layout, see Appendix B: Creating Mail Merge Layouts.
- Type a subject for the e-mails at **Subject**.
- Select the **Save: Documents** check box to convert the e-mails to be sent out as documents in Exact Synergy Enterprise.
- Under the **Sender** section, select the relevant option to define the origin of the e-mail sender. By default, the option at **Default** is selected.
- Under the **Preview** section at **Account**, type or select an account to preview how the e-mail will look like with account details before it is sent out. This is mandatory if you want to click **Preview**.
- Click the relevant check boxes to send the e-mails to the corresponding accounts.
- Click **Printable** to mail the letters or **Mail merge** to send the e-mails. After clicking **Mail merge**, a message with a link to the report log will be displayed, as follows:

Mail merge

Close

 Your request is sent for processing. 00.075.600 - [Status: Report](#)

11. Click **Status: Report** or go to Modules → HRM → Reports → Miscellaneous → Log: Mail merge to view the status of the mail merge. When the background job is executed, the e-mails will be sent or the letters will be printed. The process status in the **Status** column will then change to **Completed**. The following is a sample of the **HRM: Log - Mail merge** report:

HRM: Log - Mail merge

Close Refresh Reset

Criteria

Creator: 175745 x Jo-Anna Goh Li Ping Subject: Account: Date (Created): 07-07-2015 — 08-07-2015 Status: ☒ Completed ☒ Error ☒ Open ☒ Running

ID	Creator	Subject	Created	Processed	Status	E-mail	Remarks	Reset
75600	Jo-Anna Goh Li Ping	Mail merge	07-07-2015 09:32		Open			

Note:

For more information on the **Exact.Jobs.SysHrMail** background job that processes the mail merge, refer to the Exact Synergy Enterprise **Implementation Manual**.

4.2.2 Running campaigns using Microsoft Word mail merge

If you prefer to use Microsoft Word, you can use the **Microsoft Office Add-in** functionality to merge the account information obtained from Exact Synergy Enterprise, into a Microsoft Word document you have created.

By creating a mail merge layout in Microsoft Word, you can save the documents on your computer. You can then print the letters created by the mail merge process directly from your computer. If required, the documents can be uploaded to Exact Synergy Enterprise.

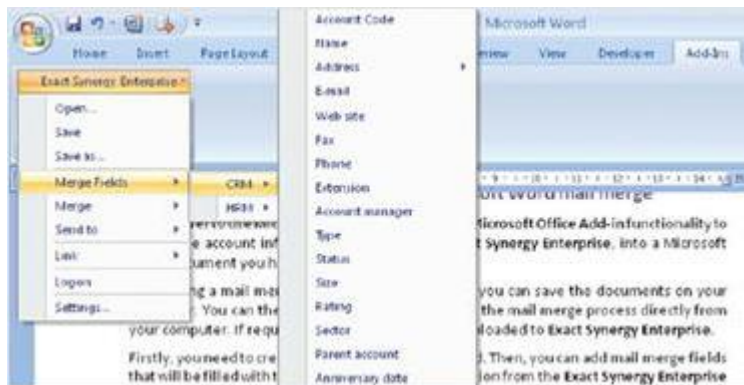
Firstly, you need to create the letter in Microsoft Word. Then, you can add mail merge fields that will be filled with the account or contact information from the Exact Synergy Enterprise database.

To create a mail merge layout in Microsoft Word, no function right is required.

To run the campaign using Microsoft Word mail merge with **Office Add-in**, see the following processes. However, this feature has been replaced by the mail merge functionality in **Synergy Office Integration**, if you have installed **Synergy Office Integration**. To run the campaign using Microsoft Word mail merge with **Synergy Office Integration**, see Appendix D: Creating Mail Merge Documents with Synergy Office Integration. When you create databases from product update 250 onwards, the mail merge functionality from **Synergy Office Integration** is no longer available in Microsoft Word. The mail merge functionality has been replaced by the new **Word Merge** functionality. For more information, see *Appendix F: Exact Word Merge*.

To create mail merge layouts in Microsoft Word:

1. Open the Microsoft Word document that you want to send to your target group to add mail merge fields into the document.
2. In Microsoft Word 2007, select the **Add-Ins** ribbon, and then click **Exact Synergy Enterprise**.
3. Select **Merge fields**, and then select **CRM**. The following shows all the possible fields available for merging:



4. Select the field that you want to generate from the **Exact Synergy Enterprise** database. In this example, we choose Contact > Full name. The corresponding merge field will be displayed in the Microsoft Word document, as follows:

Dear <<CRM_ContactPerson_FullName>>

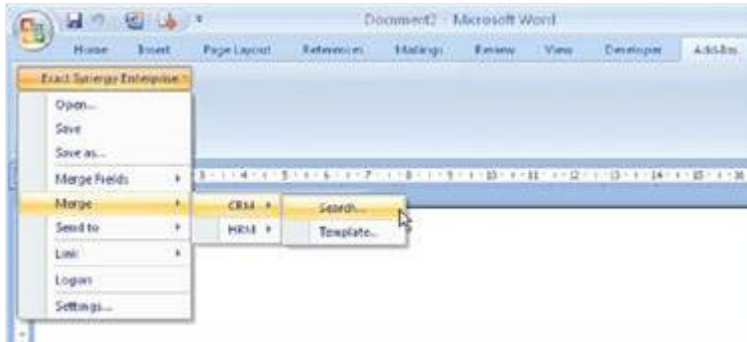
When all merge fields have been added, you can start merging the letters. This process will create a document for each account that is included in the merge. The following is a sample of a mail merge layout and its results:

«CRM_Company_Name1» Attn: «CRM_ContactPerson_FullName» «CRM_Company_Address1» «CRM_Company_Postcode» «CRM_Company_City» «CRM_Company_Country»	Bassett Bikes Attn: David Alan Bassett 19 Tremont Street 01810 Boston United States of America
Dear «CRM_ContactPerson_FullName»	Dear <u>David Alan Bassett</u>
Thank you for your recent inquiry about Deltabike. It's the next step in powering your life forward with an innovative bicycle.	Thank you for your recent inquiry about Deltabike. It's the next step in powering your life forward with an innovative bicycle.
All Deltabike mountain bikes now have Titanium frames, three models. The component specifications have moved your money's worth.	All Deltabike mountain bikes now have Titanium frames, three models. The component specifications have moved your money's worth.
All bikes are produced in-house with the finest materials: titanium and aluminum alloys developed by the aerospace Service division where we are able to make dreams about.	All bikes are produced in-house with the finest materials: titanium and aluminum alloys developed by the aerospace Service division where we are able to make dreams about.
If, after reviewing this information, you have additional request a personalized demonstration. Or, go online at and request a live demonstration.	If, after reviewing this information, you have additional request a personalized demonstration. Or, go online at and request a live demonstration.

To generate letters or e-mails via Microsoft Word, no function right is required.

To generate letters or e-mails using mail merge via Microsoft Word:

1. Open the Microsoft Word document that you want to send to your target group.
2. In Microsoft Word 2007, select the **Add-Ins** ribbon, and then click **Exact Synergy Enterprise**. You will see the following page:



3. Select **Merge**, select **CRM**, and then click **Search** to search for specific accounts. You will see the following page:

Note:

If you have a search template defined, select **Template**. For more information on creating an accounts search template, see *Creating and modifying search templates* (ID 15.444.432) in Exact Synergy Enterprise.

4. Define the relevant criteria for your search. In this example, we will search for accounts that are linked to a marketing campaign.
5. Click **Merge** after you have defined the criteria. Each account will now have a document created. You can print out all documents and send them by regular mail.

Note:

In Microsoft Word 2007, click **Add-Ins** from the menu, and then click **Exact Synergy Enterprise**. Click **Send to** to access the following options:

- **New : Document** — Select this option to combine the letters into a single Microsoft Word document.
- **Printer** — Select this option to print the letters.
- **E-Mail** — Select this option to send the documents directly via e-mail.
- **Exact Synergy Enterprise** — Select this option to store these documents in a single place by uploading them to Exact Synergy Enterprise.

4.2.3 Running campaigns externally

Apart from the above, there are also other ways of running a marketing campaign. These include:

- Advertising in mainstream media.
- Promoting products and services via fairs and related activities.
- Direct marketing to potential and existing customers.

Even though you can run a marketing campaign in different ways, the objective should still be the same. All results of these campaigns can be saved in Exact Synergy Enterprise, so you will always have insight into the results of your campaigns.

4.3 RECORDING CAMPAIGN RESPONSES AND FOLLOWING-UP ON RESPONSES

After you have sent out your message to your target group, you can expect some response. Responses can come via various channels, such as web sites, e-mails, telephone calls, or faxes. As the response is a result of your marketing effort, you may want to make sure the response is registered.

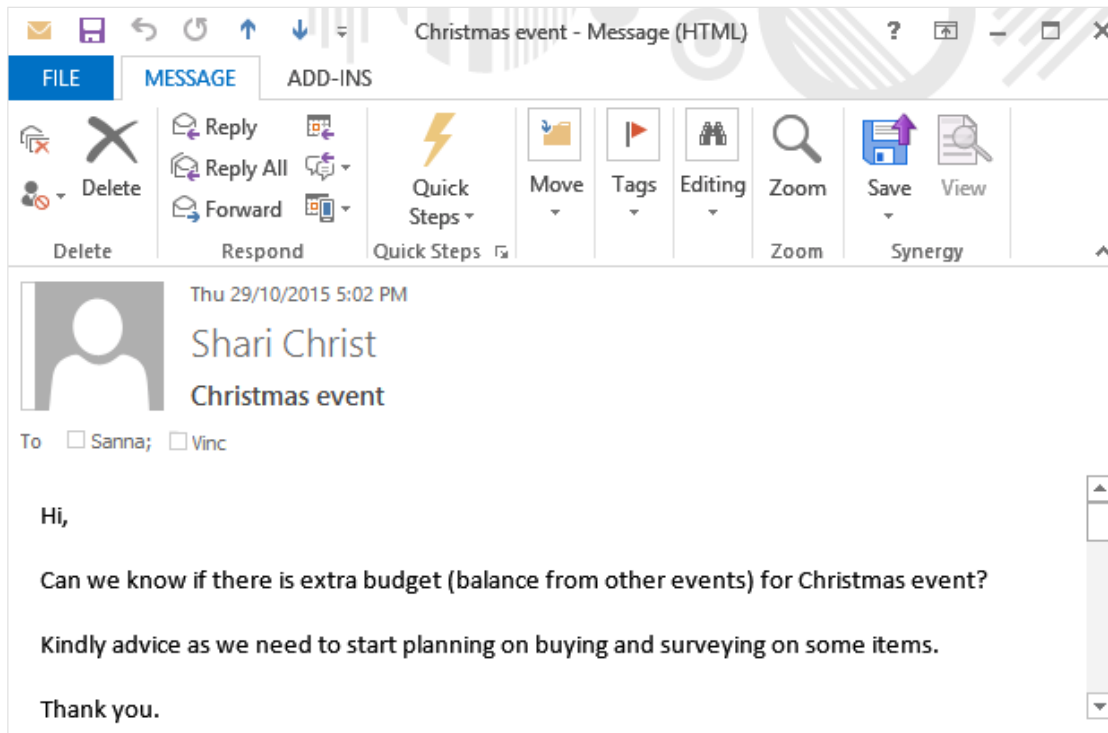
4.3.1 Uploading e-mail responses

With Exact Synergy Enterprise, you can upload e-mails from Microsoft Outlook using **Synergy Office Integration**. To be able to use this functionality, you need to have **Synergy Office Integration** installed. For more information, see *Appendix C: Installation of Synergy Office Integration*.

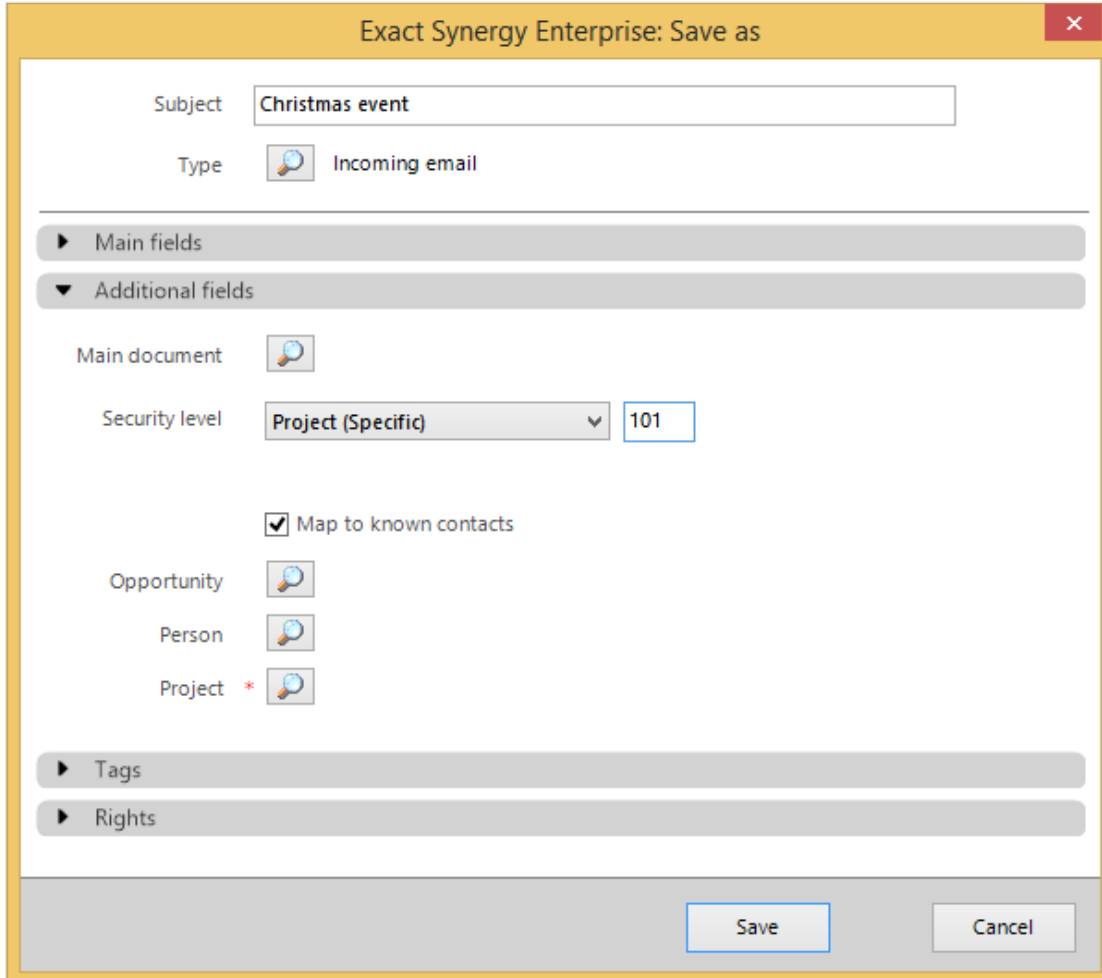
To upload e-mails via Microsoft Outlook, no function right is required.

To upload e-mails into Exact Synergy Enterprise:

1. Open Microsoft Outlook, for example in Microsoft Outlook 2013, double-click an e-mail to open it on a new page.



- Under the **Synergy** ribbon, click **Save** to upload the e-mail directly into Exact Synergy Enterprise. Otherwise, click the arrow at **Save** and select **Save As** to define the category and account where the e-mail should be saved. To measure the response you get on your campaign, select **Save As** to link the e-mail to the previously created marketing campaign in **Projects**. You will see the following page:



The image shows a dialog box titled "Exact Synergy Enterprise: Save as". It has a yellow header bar with a close button (X) on the right. The main area is white and contains the following fields and options:

- Subject:** A text box containing "Christmas event".
- Type:** A button with a magnifying glass icon and the text "Incoming email".
- Main fields:** A grey bar with a right-pointing arrow.
- Additional fields:** A grey bar with a downward-pointing arrow.
- Main document:** A button with a magnifying glass icon.
- Security level:** A dropdown menu showing "Project (Specific)" and a text box containing "101".
- Map to known contacts:** A checked checkbox.
- Opportunity:** A button with a magnifying glass icon.
- Person:** A button with a magnifying glass icon.
- Project:** A button with a magnifying glass icon and a red asterisk (*).
- Tags:** A grey bar with a right-pointing arrow.
- Rights:** A grey bar with a right-pointing arrow.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

- Define the required fields, and then click **Save**.

Note:

If you have installed **Office Add-in**, specific settings for uploading e-mails need to be set up. When these settings have been set up, you can then upload your e-mails into Exact Synergy Enterprise. For more information on setting up **Office Add-in** for Microsoft Outlook, refer to *Chapter 7 Related Matters* of Exact Synergy Enterprise **Implementation Manual**.

4.3.2 Using web response forms

In the public web sites that are defined in Exact Synergy Enterprise, it is possible to let the user enter questions that will become a part of the Exact Synergy Enterprise workflow, so that it can be quickly handled within the organization. This is done with the **CRMQuestionnaire** application where it allows the creation of a webpage for unregistered users to send in their responses. **CRMQuestionnaire** serves several different goals. These include:

- recording accounts that are not-validated, which allows web guests to leave their name, address information, and their question,
- providing an entrance point to the customer portal and reseller portal,
- providing a place where customers and resellers can enter specific questions or remarks, for example, when they have problems with the portal or have forgotten the logon information for the portal, and
- showing request types of level zero as request types that can be used for entering questions and requests.

Setting up CRMQuestionnaire

Before you start setting up **CRMQuestionnaire**, you must make sure the user **ExactWebguest** is present in the database. For more information on how to check this and add the user if necessary, see *Appendix E: Setting Up ExactWebguest*.

When the user **ExactWebGuest** is present in the database, you can create the link to the application. In the link, you can add a few parameters that will influence the way the question is handled. The following parameters can be used:

- **Action** — This controls the edit mode, only Action “0” and “2” are allowed at this time (New and update).
- **NextSite** — This is for creating special hyperlinks on the form.
- **Question** — This refers to the question put in the request.
- **MailCountry** (and other object properties) — This can be passed as default values.
- **NoLogin** — If “1” is passed, the application will not show the login buttons for the portals.
- **CType** - This is the type of the account that enters the request; this includes **C (Customer)** or **R (Reseller)**.
- **RequestType** — This is the type of the request that should be created.

The following is an example of a link to **CRMQuestionnaire**. Keep in mind that you can either use this link on your web site, in the customer portal, or in a mailing to your accounts.

```
CRMQuestionnaire.aspx?Question=Please+provide+a+password+for+the+Reseller+Portal&NoLogin=1&CType=R&RequestType=103&MailCountry=NL
```

Using CRMQuestionnaire

Now that you have created the link to **CRMQuestionnaire**, it will be available to the customers and visitors of your web site depending on how you have communicated the link. People who access the application will see a form in which they can fill out some information about their organization and ask a question.

When the form is filled out, a new account with the status **Not-validated** will be created based on the information the visitor has put in. When this is an existing account, you can use the merge functionality described earlier in this manual to merge that account that is not validated with the existing account to prevent doubles from occurring. Alternatively, the **Deduplication** feature also can be used. For more information on managing duplicate accounts, see *Chapter 3.3.4 Double account entry management*.

After the form has been filled out and submitted, a request will be created and placed in the workflow of an employee depending on the flow that was defined for that request type. This is where you can register responses from a marketing campaign. This is done by creating a request type where the marketing project is linked to it by default. Thus, every response based on the marketing campaign will be registered under the project.

Advanced setup of CRMQuestionnaire

Exact Synergy Enterprise offers possibilities to improve the functionality of **CRMQuestionnaire** as well as improve the appearance of the form. Setting this up can be a complicated task and is highly dependent on your wishes. This is why the advanced setup will not be described in this manual.

In the customer portal of Exact at <https://customers.exact.com>, you can find several help files about setting up **CRMQuestionnaire**. To learn how to set up a response after completing the form, see document *Setting up a response after receiving a feedback* (ID 16.364.952) on the customer portal of Exact.

4.3.3 Managing other response types

Responses from a marketing campaign cannot always be automatically saved in Exact Synergy Enterprise. Some examples of these include responses received by telephone calls, mails, and conversations from trade fairs. It is crucial that all responses are recorded so that your organization can act on them.

One way to record responses received is by creating a request in Exact Synergy Enterprise for every response. It is also advisable to create a specific request type to handle these responses. This will help in separating responses obtained from marketing campaigns via the other normal day-to-day requests.

When responses are recorded as a request, a person will be able to act on it since it will be displayed in their workflow. This helps to ensure that all responses received externally are acted upon.

4.3.4 Following-up on campaign responses

Apart from managing responses via requests, there are other ways to manage responses received from the marketing campaigns that are carried out. Responses received from marketing campaigns are mostly opportunities that should be further pursued.

Some examples of responses include discussions with potential customers during a trade show whereby the customers expressed interest in the product. Another example is when a potential customer enquires about the product via the web site, e-mail, or a telephone call. These responses can be viewed as an opportunity. Exact Synergy Enterprise allows you to monitor these opportunities and their progress through a defined sales cycle. This allows you to keep track of all available opportunities and their statuses.

For more information on opportunities, see *Chapter 6 Sales Force Automation*.

4.4 MANAGING NEWSLETTERS

One of the ways of keeping your customers informed is by sending them regular newsletters. In these newsletters, you can inform them about the changes in your company, new products, or changes in specific services. Some of the benefits of sending out newsletters include:

- Keeping your customers involved in your company.
- Creating new leads by informing them about new products.
- Keeping the relationship with your customers at a good level by properly informing them about the changes in your service.

Newsletters can be sent by regular mail, but Exact Synergy Enterprise also allows you to send them via e-mail.

In order to effectively send newsletters to the relevant customers and partners, you must be able to select the correct target group. You can even create different newsletters based on different criteria, such as a newsletter for partners, customers, large enterprises, small enterprises, automotive industry, customers that were registered in the past six months, or customers in a certain state. To do this, go to Modules → Customers → Reports → Accounts → Search and customize the search on the **Accounts: Search** page by defining the relevant search criteria.

You can search for accounts for the above mentioned criteria by adding the **Type**, **Size**, **Sector**, **Type: Since**, or **State** fields, if they are not already available. You can also combine the criteria, such as searching for customers that are in the automotive industry and registered in the last six months, and who are also located in the local state.

This will list accounts that fit your criteria. You can then send customized newsletters to the accounts that fit the criteria.

To be able to send newsletters, the **Exact.Jobs.SysHrMail.dll** background job needs to be set up and configured. For more details about scheduling background jobs, see *Chapter 5 Background Jobs Configuration* in the Exact Synergy Enterprise **Implementation Manual**.

Newsletters are created as documents in Exact Synergy Enterprise. When sending out these newsletters, you can follow the process as described at *Chapter 4.2.1 Running campaigns using mail merge*.

4.5 REPORTS

Reports are important tools that managers can use to monitor the progress of a marketing campaign. It can also be used to assess the effectiveness of a campaign.

4.5.1 Analyzing customer satisfaction

It is important to know the receptiveness of a marketing campaign. This can be recorded from the satisfaction of customers with regards to a campaign. To be able to view the satisfaction of a campaign in Exact Synergy Enterprise, you will need to use a request type specifically for that campaign to measure the satisfaction level.

For more information on analyzing customer satisfaction, see *Chapter 7.3.1 Customer satisfaction*.

To view the customer satisfaction report, no function right is required.

To view reports on customer satisfaction for existing campaigns:

1. Go to Modules → Marketing → Reports → Customers → Customer satisfaction. You will see the following page:

Customers: Customer satisfaction

Close
Show
Reset

Filter

Date: <Range> -- --
Account: Group
Account: Division
Account manager: Cost center group
Account
Account: Classification
Request: Project
Show: Field blank

Layout

Axis: Vertical Account

Left

Request type
Request: Status Open Approved Realised Processed Rejected Draft
Request: Field
Field: Value
Count

Right

Request type
Request: Status Open Approved Realised Processed Rejected Draft
Request: Field
Field: Value
Count

2. Under the **Left** section, select the relevant request type at **Request type**.
3. Define the other relevant criteria and click **Show** to display the results. The following is a sample of a customer satisfaction report:

Results		
Account	A2 Networks B.V.	Quantity
A2 Networks B.V.		1
Total		1
Legend: Left		
	A2 Networks B.V.	

Note:

All fields with the “!” icon are mandatory.

From the report, you are able to determine which elements caused the success of your marketing campaign. With this information, you are able to improve future campaigns.

4.5.2 Viewing overviews of current campaigns

Exact Synergy Enterprise allows you to view all the related information of a marketing campaign in a single place. Since each marketing campaign is recorded as a project, all the required information can be found on the project card.

To view this report, no function right is required.

To obtain overviews of campaigns:

1. Go to Modules → Projects → Reports → Search → Projects. Define the relevant criteria and click **Show** to search for the required project.
2. Select the project by clicking the project code in the **Project** column. You will see the following page:

Project: .001.001.001.001.001 - 733A LA April - Repeats

Close Edit

Created by Doris F Dunn 27-02-2003 21:51
Modified by Jonathan, Yin Hoe Choong ??? 20-05-2013 15:56

General	Start up	Execution	Reporting
Type Internal <input checked="" type="checkbox"/> Register hours & costs on this project	Accounts	Planning	Transactions
Code .001.001.001.001.001	Activities & material	Hour & expense entry	Reports
Description 733A LA April - Repeats	Rates	Hour & expense approval	
Security level Internal - 10	Deliverables & WBS lines	Workflow	
Manager Rajesh Pat	Budget	Documents	
Start date — End date 01-03-2002 — 31-12-2002			
Status Completed			
Use drag-and-drop planning <input checked="" type="checkbox"/>			
Use deliverables & WBS <input checked="" type="checkbox"/>			
Allow hour & expense entry for non-members <input type="checkbox"/>			

Financial

Cost center

Cost unit

Default currency EUR — Euro

Your reference

Contract

Division 072 — Exact Software Austria GmbH

Parent CS2.001.001.001.001 — Conversion to Globe 2003 - Exact Austria, Active

Invoicing method Meal01 — Meal allowance

Members Child projects Workflow Remarks Report


Add New

Project	Status	Description	Manager	Start date	End date
---------	--------	-------------	---------	------------	----------

From the project card, the following information can be obtained:

- Whether there are any child projects that indicate the different treatment of different target groups.
- From the **Project monitor** section of the project card, the budget and planning-related requests can be obtained. This shows the budgeted expenditure and the overview of activities that are planned respectively. These are described further in the following sections.
- From the **Project monitor** section of the project card, other related information, such as the documents, requests, and opportunities created, and employee planning can be viewed.

Note:

If you are not able to view some of the information, you can click  **Customize**, and then select the relevant information that you want to display on the project card.

4.5.3 Viewing requests planned for marketing campaigns

In Exact Synergy Enterprise, you can view the requests of a particular marketing campaign conducted for a specific time period. This helps to provide an overview of the status of requests for the campaign. The request planning report provides information on all requests that are linked to a project and the planning for the project over a period of time. This report is useful for you to keep track of the activities for your marketing campaign or sales project.

To view the requests planned for a marketing campaign, no function right is required.

To view all requests planned for marketing campaigns:

1. Go to Modules → Projects → Reports → Requests → Request planning. You will see the following page:

2. Under the **Criteria** section, type or select the relevant project at **Project**.
3. If you only want to view a specific type of request, select the type of request required at **Type**.
4. Under the **Layout** section at **Scale**, select the type of scale which you want to use to display the planning over the time period.
5. Select the range of dates at **Date** to view the requests within the specified dates.

Note:

This is only available if you select **Daily**, **Weekly**, or **Monthly** at **Scale**. If you select **Yearly**, you will see **Year** where you can specify the year.

6. Next, select how you want to group the request that will be displayed at **View**:
 - **Members** — Select this option to display the requests grouped by project members. The requests that are linked to the members are assigned to them. Requests that are not linked to any members will not be listed even though they belong to the project.
 - **Requests** — Select this option to display the requests without any grouping.
 - **Item 1** — Select this option to display the requests grouped by items that are linked to the requests. Requests that are not linked to any item will not be listed even though they belong to the project.
7. Then, define the other relevant criteria as necessary.

8. Click **Show** to display the results. The following is a sample list of all requests planned for a marketing campaign:

Project: Request planning

Close
Refresh
Reset

Criteria

Project: 20003 [Installatie - 1 koffiemachine \(Zeven Heuvels\)](#)
Request: Status ☒ Open ☒ Approved ☒ Realised ☒ Processed ☐ Rejected

Category:
Type:

Request: ☐ Realised(Request) : Use : Planned date ☐ Use current date for requests without date
Show (Children):

No

Layout

Scale: Monthly
View: Members
Date: 01-10-2015 — 31-12-2015

Request
October, 2015
November, 2015
December, 2015

Erik van Mierlo
Sanne Klein - van Elburg

Status	Legend	Description	Hours (Planned)	Hours (Actual)	Amount (Planned)	Amount (Actual)
		Open	0.0	N/A	0.00	N/A
		Approved	0.0	N/A	0.00	N/A
		Realised/Processed	0.0	0.0	0.00	0.00
		Rejected	N/A	N/A	N/A	N/A

9. Click **Close** to exit.

Note:

All fields with the "!" icon are mandatory.

4.5.4 Viewing marketing campaign budgets

As with most business activities, carrying out a marketing campaign involves cost. You may want to monitor the financial budgets of your marketing and sales projects to weigh the benefits of the projects against the cost involved in carrying out the projects. The project budget report in Exact Synergy Enterprise can be used to obtain an overview of your project budgets. This report can be used to monitor your balance sheet and the profit and loss summary for your marketing and sales projects. You can also choose to display the allocation of budget for the projects over a specific financial period or based on the status of the allocated amount. The report can also be used to view the financial entries made for a project.

To view this report, no function right is required.

To view budgets of marketing campaigns:

1. Go to Modules → Projects → Reports → Search → Projects. Define the relevant criteria and click **Show** to search for the required project. Select the project by clicking the project code in the **Project** column.
2. Click **Budget**. You will see the following page:

Project budget: .001.001.001.001.027
☆ ?

Close

General

Project .001.001.001.001.027 — 072V3V4 KCS Austria
Customer KCS Austria Engineering GmbH
Manager Rajesh Pat
Start date — End date 10-03-2003 — 31-12-2003

Table ☐ Update with WBS

Request budget

ID	Description	Cost	Revenue	Status	Date completed		
Budget lines New							
Activities	Description	Start date	End date	Budgeted	Cost budget	Revenue budget	Actions
Support01 — Customer support		10-03-2003	31-12-2003	2.00	€ 0.00	€ 1,640.00	
Total for all activities				2.00	€ 0.00	€ 1,640.00	
Material	Description	Start date	End date	Budgeted	Cost budget	Revenue budget	Actions
No material defined							
Buffer	Description	Start date	End date	Budgeted	Cost budget	Revenue budget	Actions
No buffer defined							
Totals					Cost budget	Revenue budget	
Total budgeted lines					€ 0.00	€ 1,640.00	

3. Click **Close** to exit.

5. PRICE QUOTATIONS

Normally, a seller presents a price quotation to a prospective customer who intends to purchase the products or services from the seller. This list contains not only the costs of products or services that the prospective customer is interested in, but also relevant information, such as delivery time, technical specifications, et cetera.

At any given time, a customer can have one quotation or more to enable them to make the best choice out of a few sellers. Therefore, providing useful information in quotations is essential as they have the possibility to be turned into sales revenues for an organization.

Business benefits:

- Allows your sales force to better understand the requirements of the prospective customers.
- Provides sources of reference for your sales force for them to understand what was promised to the prospective customers, such as the discounts applied when buying in bulk, et cetera. This enables everyone in the team to take over one's responsibility in handling the quotation if the owner of the quotation is not available.
- Provides opportunities for your sales force to market other products and services.

5.1 CREATING QUOTATIONS

There are two ways to create quotations, which are:

- creating quotations manually, or
- creating quotations using templates.

Note:

To create **Word Merge** templates for quotations with repeating lines and to generate quotations using **Word Merge**, see *Appendix F: Exact Word Merge*.

5.1.1 Creating quotations

Anyone can create quotations. However, you can only modify or delete quotations if:

- you are the owner of the quotation card, or
- you are the manager of the owner of the quotation card.

To create quotations:

1. Go to Modules → Customers → Entry → Entry → Quotation. You will see the following page:

Quotation: New ☆ ⓘ

Created by Jo-Anna Goh Li Ping 07-07-2015 11:01

Close Save Open in MS Word

Quotation

Account Status **Open**

Contact Owner 175745 Jo-Anna Goh Li Ping

Division Expiry date -- --

Currency EUR Euro Template

Payment condition Opportunity

Your reference Project

Summary

Quoted amount EUR 0.00

Discount EUR 0.00

	Item	Quantity	Unit	Sales price	Discount (%)	Discount amount	Amount	Price list
1								

Note:

When you create databases from product update 250 onwards, the **Open in MS Word** button will not be available. The **Word Merge** feature has replaced the mail merge functionality. The **Open in MS Word** feature has been replaced by **Generate Quotation**.

Existing users moving to product update 250 will still have the old mail merge functionality by default, and this can be switched to the new **Word Merge** functionality. For more information, see *Appendix F: Exact Word Merge*. When the **New Word Merge** check box is selected on the **Documents: Settings** page, the **Generate Quotation** button will be displayed, replacing the **Open in MS Word** button.

2. Under the **Quotation** section at **Account**, type or select the account that the quotation is for. All types of accounts can be selected except for **Bank**, **Employee**, **Division**, and **Supplier**.
3. At **Contact**, select the contact person for the quotation. The contacts available for selection are based on the account selected.
4. Type or select the person who is in charge of the quotation at **Owner**. By default, the person who creates the quotation will be selected.
5. At **Expiry date**, type or select a date to specify the end date of the quotation.
6. Select a quotation template at **Template** if you want to create a quotation based on the selected template. To find out how quotation templates can be created, see *Chapter 5.1.2 Creating quotation templates*.
7. At **Your reference**, type the reference for the customer which the quotation is for.
8. Once you have defined the relevant criteria, you can start to define the information about the item(s) for your customers in the **Item**, **Quantity**, and **Discount (%)** columns. Only items that match the following criteria are available for selection:
 - items with the **Active**, **Future**, and **Discontinued** status,
 - items with the **Standard**, **Bulk issue**, **Labor hour**, **Machine hour**, and **Contract** item type,
 - items with the **Sales** attribute, and
 - items with a security level less than or equal to your security level.

Note:

- The value in the **Discount amount** column can be edited only if the **No discount** check box under the **Attributes** section on the item card, is not selected. If the value at **Discount amount** is modified, the **Discount (%)** amount will be automatically re-calculated.
- The value in the **Amount** column can be edited.
- The values in the **Discount (%)** and **Discount amount** columns will be re-calculated if the value at **Amount** is modified.

9. Finally, click **Save** to save the quotation.

Note:

All fields with the “!” icon are mandatory.

Once a quotation has been created, a quotation number will be given for the quotation automatically. This is a running number and the next quotation number can be specified under the **Quotation** section by clicking **Edit** at Modules → Customers → Setup → Other → Settings.

You are able to retrieve quotations created via Modules → Customers → Reports → Quotations → Search. Then, define the relevant criteria and click **Show**. The following is a sample of a quotation created:

Quotation: 1002 ★ ?

[Close](#) [Save](#) [Delete](#) [Open in MS Word](#) [Create sales order](#)
Created by Suthichana Tharmapalan 11-08-2010 15:25
Modified by Suthichana Tharmapalan 11-08-2010 15:26

Quotation						Summary	
Quotation number 1002						Quoted amount EUR 790.00	
Account	8000166	Status	Open	Owner	44	Discount EUR 0.00	
Contact		Expiry date	31-12-2015	Template		View printed quotations for this account	
Division	003	Opportunity	OPP2006	Project			
Currency	EUR						
Payment condition	04						
Your reference	5555						

	Item	Quantity	Unit	Sales price	Discount (%)	Discount amount	Amount	Price list
1	✖	1.00	EACH	0.000	0.00	-790.00	790.00	

Note:

When you create databases from product update 250 onwards, the **Open in MS Word** button will not be available. The **Word Merge** feature has replaced the mail merge functionality. The **Open in MS Word** feature has been replaced by **Generate Quotation**.

Existing users moving to product update 250 will still have the old mail merge functionality by default, and this can be switched to the new **Word Merge** functionality. For more information, see *Appendix F: Exact Word Merge*. When the **New Word Merge** check box is selected on the **Documents: Settings** page, the **Generate Quotation** button will be displayed, replacing the **Open in MS Word** button.

5.1.2 Creating quotation templates

When creating quotations, you have the option to use templates. A template consists of basic information for a quotation that is urgently needed or frequently created. Using templates to create quotations can eliminate redundant data entry and increase work efficiency. This quotation template is also necessary if you want to perform a quotation mail merge.

Quotation templates can be created using **Synergy Office Integration** and Microsoft Word.

Note:

Synergy Office Integration only supports Microsoft Office 2007, 2010, and 2013. For more information on the installation, see *Appendix C: Installation of Synergy Office Integration*.

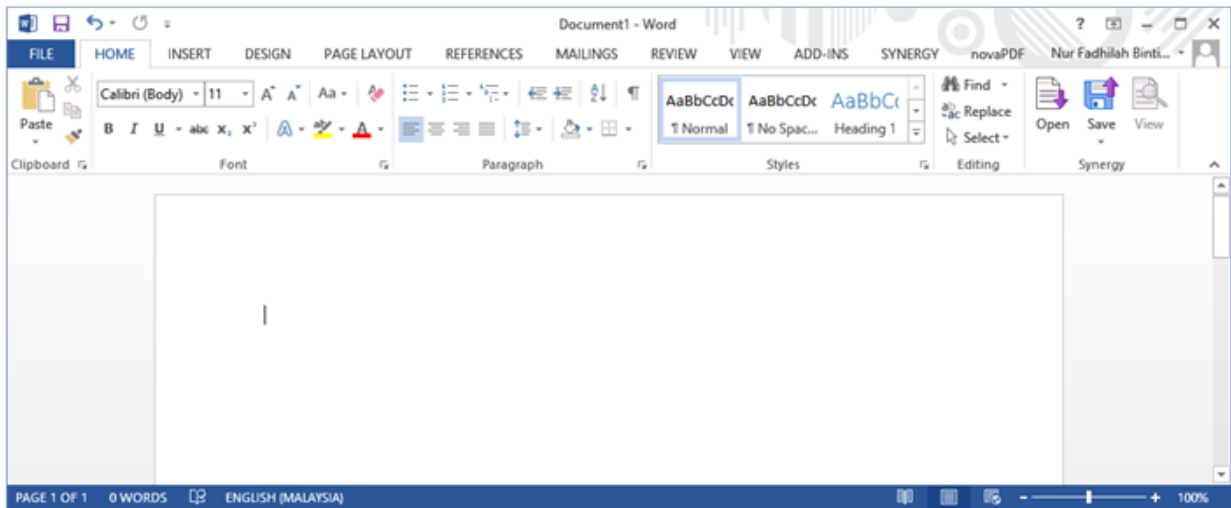
Once you have installed **Synergy Office Integration**, you can proceed to create quotation templates.

Note:

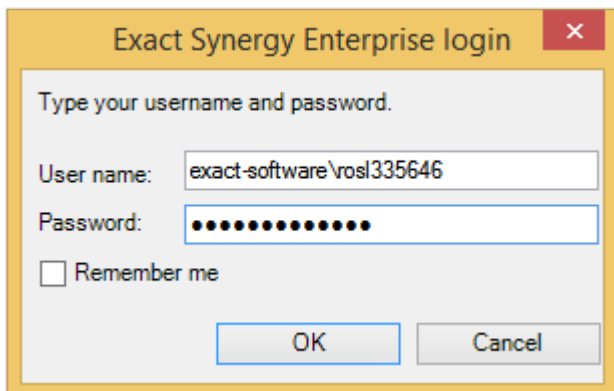
To create **Word Merge** templates for quotations with repeating lines, see *Appendix F: Exact Word Merge*.

To create quotation templates:

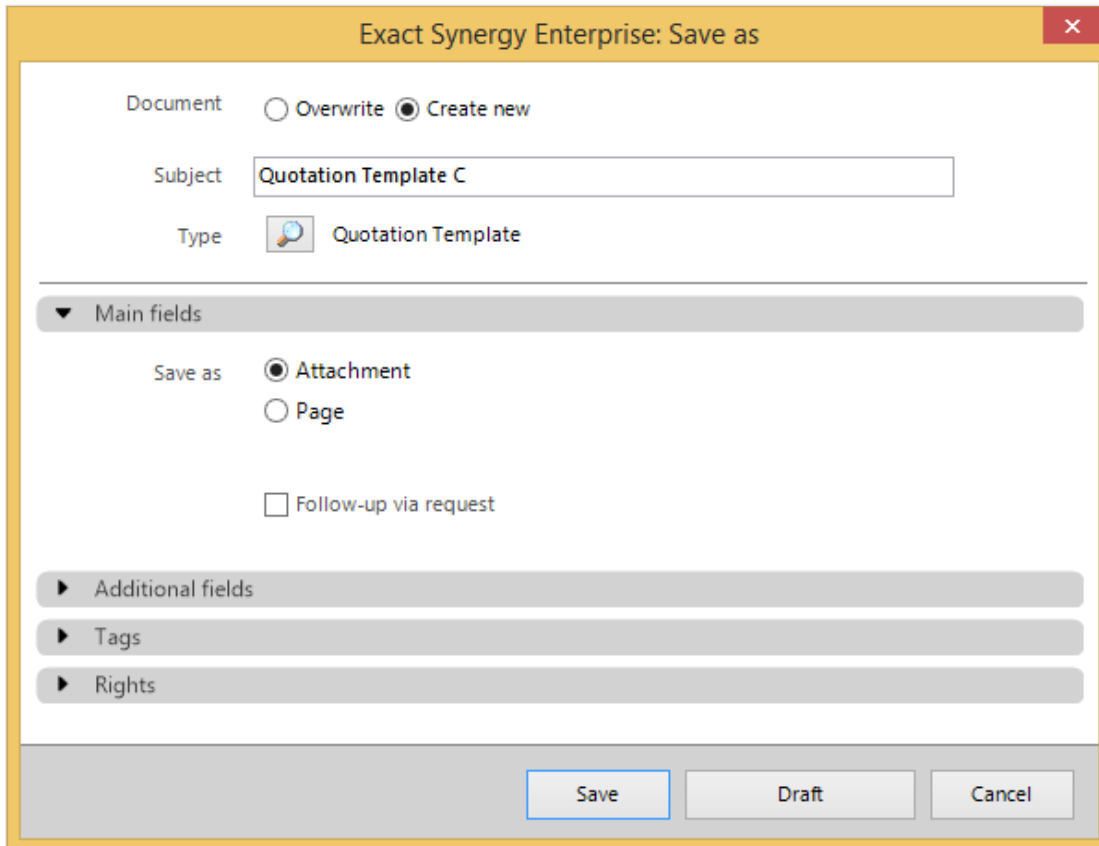
1. Open a new Microsoft Word document. You will see the following page:



2. In the **Synergy** ribbon, click the arrow at **Save**, and then click **Save as**. The following page will be displayed:



- Fill in your username and password that you use to log in to Exact Synergy Enterprise at **User name** and **Password**, and then click **OK**. You will then see the following page:



The image shows a 'Save as' dialog box titled 'Exact Synergy Enterprise: Save as'. It has a yellow header bar with a close button (X) in the top right corner. The dialog is divided into several sections:

- Document:** Contains two radio buttons: 'Overwrite' (unselected) and 'Create new' (selected).
- Subject:** A text input field containing 'Quotation Template C'.
- Type:** A dropdown menu showing 'Quotation Template' with a magnifying glass icon to its left.
- Main fields:** A section with a downward arrow icon on the left. It contains:
 - Save as:** Two radio buttons: 'Attachment' (selected) and 'Page' (unselected).
 - Follow-up via request:** An unchecked checkbox.
- Additional fields:** A gray bar with a right-pointing arrow and the text 'Additional fields'.
- Tags:** A gray bar with a right-pointing arrow and the text 'Tags'.
- Rights:** A gray bar with a right-pointing arrow and the text 'Rights'.

At the bottom of the dialog, there are three buttons: 'Save' (highlighted with a blue border), 'Draft', and 'Cancel'.

- At **Document**, select **Create new** to create a new template. This field is only available if you have an existing quotation.
- At **Subject**, type the name of the template that you want to create.
- Next, select **Quotation template** as the document type at **Type**.
- Under the **Main** fields section at **Save as**, select **Page**.

8. Expand the **Additional fields** section to display the following page:

The screenshot shows a dialog box titled "Exact Synergy Enterprise: Save as". The "Document" section has "Overwrite" selected. The "Subject" field contains "Quotation Template C". The "Type" is "Quotation Template". The "Additional fields" section is expanded, showing "Main document" with a search icon, "Publish" with "Normal" selected, "Security level" set to "Internal" with a value of "10", "Project" with a search icon, "Division" set to "411", and "Language" set to "English". At the bottom, there are "Save", "Draft", and "Cancel" buttons. The "Save" button is highlighted.

9. You can define the security level of the template, the project and/or division to be linked to the template, as well as the language for the template.

10. Next, expand the **Rights** section to display the following page:

Exact Synergy Enterprise: Save as

Document ☐ Overwrite ☒ Create new

Subject

Type Quotation Template

▶ Main fields

▶ Additional fields

▶ Tags

▼ Rights

Edit rights

Owner

View rights

11. You can define the edit and view rights, as well as the owner of the template.

12. Finally, click **Save** to save the template as a document in Exact Synergy Enterprise.

5.2 CONVERTING QUOTATIONS TO SALES ORDERS IN EXACT GLOBE NEXT

When creating sales orders based on quotations, it is important that the valuable information in the quotations is transferred quickly and accurately to sales orders. This is to ensure faster deliveries of goods and invoice processing.

With the integration between Exact Synergy Enterprise and Exact Globe Next, existing quotations in Exact Synergy Enterprise can easily be converted to sales orders in Exact Globe Next.

This conversion is applicable if you are using Exact Synergy Enterprise product update 245 and Exact Globe Next product update 400 onwards.

Besides that, a few criteria must be met in order for the conversion to be carried out successfully. These are:

- The **Convert to back office sales order** check box under the **Quotation** section at Modules → Customers → Setup → Other → Settings must be selected.
- Function right **740 – Allows to convert quotations to back office sales orders** is required. Users with the **Sales manager** role have this function right. The **Create sales order** button is available only if this point and the first point are fulfilled.
- A debtor code must be linked to the account which the quotation is created for.

- The back office connection for the division of the quotation's owner needs to be set up at Modules → System → Setup → Back office → Back office connection.
- The following Exact Globe Next entities must be exposed to ensure connection to Exact Globe Next is established. These are **SalesOrderLine**, **SalesOrderLineHeader**, **Account**, **Resource**, **Item**, **PaymentCondition**, and **Exchange rate**.
- The synchronization of data between Exact Synergy Enterprise and Exact Globe Next must be done beforehand so that data can be transferred to Exact Globe Next. The data include:
 - the quotation owner's ID,
 - the debtor code of the quotation account,
 - the payment condition of the quotation,
 - the exchange rate used in the quotation is defined in Exact Globe Next, and
 - all items specified in the quotation are of sales item type.

Once all these criteria have been fulfilled, you can start to convert quotations to sales orders.

To convert quotations to sales orders:

1. Go to Modules → Customers → Reports → Quotations → Search, define the required criteria, and then click **Show**.
2. From the list of quotations displayed, click the hyperlink in the **Quotation number** column to view a particular quotation. An example of the following page is displayed:

Quotation: 1000 ☆ ⓘ

[Close](#) [Save](#) [Delete](#) [Generate Quotation](#)

Created by gohj175745 07-07-2015 11:57
Modified by gohj175745 07-07-2015 11:58

Quotation

Quotation number 1000

Account 60093 [Cafe Hout](#)

Contact [411](#) [411](#)

Division [411](#)

Currency EUR [Euro](#)

Opportunity [Project](#)

Status Open

Owner 175745 [gohj175745](#)

Expiry date 31-12-2015 [31-12-2015](#)

Payment condition 00 [Betaling binnen 30 dagen](#)

Your reference

Summary

Quoted amount EUR 22.66

Discount EUR 0.00

[View printed quotations for this account](#)

Item	Quantity	Unit	Sales price	Discount (%)	Discount amount	Amount
1 BON0003 R.P. Espresso Mezzo	1.00	kg	22.655	0.00	0.00	22.66

Note:

When you create databases from product update 250 onwards, the **Open in MS Word** button will not be available. The **Word Merge** feature has replaced the mail merge functionality. The **Open in MS Word** feature has been replaced by **Generate Quotation**.

Existing users moving to product update 250 will still have the old mail merge functionality by default, and this can be switched to the new **Word Merge** functionality. For more information, see *Appendix F: Exact Word Merge*. When the **New Word Merge** check box is selected on the **Documents: Settings** page, the **Generate Quotation** button will be displayed, replacing the **Open in MS Word** button.

3. Next, click **Create sales order**. This button is available only if the **Convert to back office sales order** check box under the **Quotation** section at Modules → Customers → Setup → Other → Settings is selected and you have been assigned the function right **740 – Allows to convert quotations to back office sales orders**.

Note:

Once the quotation is converted to a sales order, you will not be able to modify the information in the quotation. When you view the quotation, the **Sales order no.** field will be available. You can click the hyperlink next to the field to view the sales order.

6. SALES FORCE AUTOMATION

Opportunities are important to an organization. If effectively monitored, they can be used as a yardstick to measure the potential revenue that can be realized at a later stage.

An opportunity is most useful in providing organizations an insight into the potential or calculated future revenue. This helps to ensure the survival of a business. It can also help in ensuring that a marketing event is followed up accordingly and that no opportunity is left out.

In monitoring the opportunities available, a manager is also able to determine the success rate of the team as well as the conversion ratio between different sales stages. This helps in determining the number of opportunities required in order to meet the target of the team.

Typically, opportunities can be used by sales employees. Other than that, the sales manager and top management can monitor the progress of opportunities to determine the future of the organization.

Opportunities can also be used for evaluating various activities including the success of marketing events, sales activities, sales stages, and items. The information can then be used to improve these activities.

Normally, an opportunity goes through a certain defined sales cycle. The sales cycle defines the processes, activities and stages that an opportunity should go through depending on the objectives. Different sales cycles are applicable to different sales objectives. In order to have successful opportunities, the sales cycles should be managed properly.

After going through the whole sales cycle, the success rate of opportunities can be analyzed to identify any bottlenecks or other success factors, if available. This can be used to improve the sales cycle so as to increase the success rate of opportunities.

By monitoring the opportunities and viewing the reports available, a manager is able to tell which opportunity is worth pursuing as well as foresee which opportunity will limit the team's capacity in the future. The manager can also ensure that if the opportunity levels drop, the team can be asked to increase their effort to obtain more opportunities. This will indirectly lead to better future revenue chances.

6.1 ORGANIZING OPPORTUNITIES

An opportunity should, initially, have as much information as required. This allows you to quickly create the opportunity so that immediate action can be taken before the interest diminishes. However, as the opportunity is taken care of over time, more information should be gathered, such as the probability of success and the correct contact person for the opportunity, so that more informed business decisions can be made. In the end, only an opportunity that provides a lot of information is useful when conducting analysis in the future.

There are multiple things that can be specified in an opportunity. These are dependent on certain variables that should be set up. Setting up these variables will ensure that opportunities are organized properly and information contained in them is useful.

By organizing your opportunities, you can get enough information to determine the success rate of the opportunities as well as know the contributing parties that can make the opportunities a success. Organizing opportunities also tells you at a glance, the exact stage the opportunity is in, with regard to a particular sales cycle.

The variables that should be set up include:

- having unique codes,
- having predefined sales cycles,
- specifications of sources,

- specifications of contact and partner roles, and
- recording reasons for losing the opportunities.

One of the most important information to be specified for an opportunity is the sales cycle. This will allow it to be tracked accordingly and for the relevant activities to be carried out at the corresponding stages. For more information on sales cycles, see *Chapter 6.1.2 Creating sales cycles*.

Business benefits:

- Gives your sales force the required information and technology they need to manage leads and prospects.
- With the sales funnel, you can determine bottlenecks and success factors in the sales process.
- Automatic updates of account type based on the stage of the opportunity.
- Easily creates opportunities for all accounts that are linked to a campaign or target group.
- All opportunities get the right attention because activities are automatically created based on the stage of the individual opportunity.
- Insight into the reasons as to why, whom or which stage an opportunity is lost.
- Rates sales people based on the available extended reports.

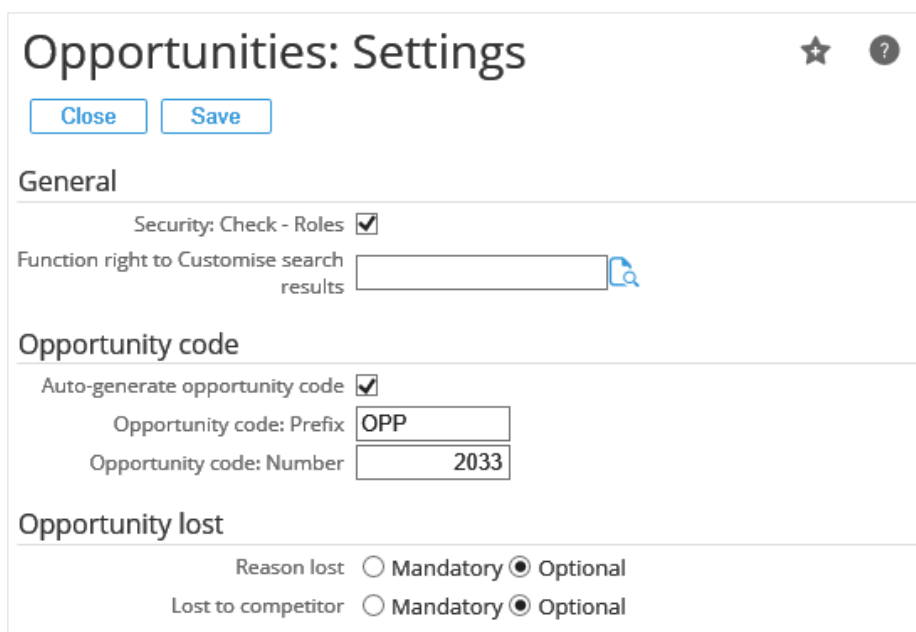
6.1.1 Assigning opportunity codes

In Exact Synergy Enterprise, each opportunity is identified by a unique code. You can specify a format for this unique code. This can then be automatically applied to every new opportunity so that you do not have to assign codes to a new opportunity every time. Even though a code can be automatically created, it can still be changed by the user. This serves as a suggested code only.

To set up the auto-generation of opportunity codes, function right **222 — Maintain CRM Settings** is required. Users with the **Administrator** and **Customer manager** roles have this function right.

To specify code formats for new opportunities:

1. Go to Modules → Customers → Setup → Opportunity management → Settings. You will see the following page:




Opportunities: Settings ★ ?

[Close](#) [Save](#)

General

Security: Check - Roles ☒

Function right to Customise search results 

Opportunity code

Auto-generate opportunity code ☒



Opportunity code: Prefix

Opportunity code: Number

Opportunity lost

Reason lost ☐ Mandatory ☒ Optional

Lost to competitor ☐ Mandatory ☒ Optional

2. Under the **General** section, select the **Security: Check - Roles** check box to implement a checking on the availability of the function right **721 - Allows to view Opportunity card** when people attempt to view opportunity cards. Depending on the role levels, information displayed on the opportunity cards may vary.
3. At **Function right to customize search results**, type or select a function right to allow customization of the **Opportunities: Pivot analysis** and **Opportunities: Search** pages whereby the  **Customize** icon on these two pages will be displayed. If this field is not defined, the  **Customize** icon will always be displayed.

Note:

This field is available only if you have function right **222 – Maintain CRM settings**.

4. Under the **Opportunity code** section, select the **Auto-generate opportunity code** check box if you want to generate codes for new opportunities automatically.
5. Type a prefix and number at **Opportunity code: Prefix** and **Opportunity code: Number** respectively.
6. Under the **Opportunity lost** section, select **Mandatory** at **Reason lost** to make it compulsory to fill in the reasons for the lost when the **Lost** button is selected during viewing the opportunity cards. If you select **Optional**, you can always fill in the reasons later at **Reason lost** when editing opportunity cards.
7. Select **Mandatory** at **Lost to competitor** to make it compulsory to fill in the competitors to whom you lost the opportunity when the **Lost** button is selected during viewing the opportunity cards. If you select **Optional**, you can always fill in the competitors later at **Lost to competitor** when editing opportunity cards.
8. Click **Save** to create a code format, and then click **Close** to exit.

6.1.2 Creating sales cycles

Opportunities can be tracked according to sales cycles. A sales cycle will typically go through different stages. In a business world, different sales cycles can be applied to many situations such as those based on products, customer segments, new business opportunities or cross-selling. As such, there should be a sales cycle defined for all these different groups.

In order to track opportunities in Exact Synergy Enterprise, a sales cycle must be created defined. Each opportunity will be linked to a sales cycle. This will allow different opportunities to be treated differently according to the nature of the opportunity. The sales cycle will list the number of sales stages that the opportunity will go through, give each stage a name, and link activities to the different stages via request types.

This allows for the creation of relevant requests to accompany each stage as it is reached. When creating an opportunity, it is mandatory to link a sales cycle to it. Based on this sales cycle, the opportunity will follow all the relevant stages as defined in the sales cycle.

To create a sales cycle, function right **5 — Create request types, and edit request types** is required. Users with the **Administrator** role have this function right.

To create sales cycles:

1. Go to Modules → Customers → Setup → Opportunity management → Sales cycles, and then click **New**. You will see the following page:

Opportunities: New - Sales cycle ☆ ?

Created by gohj175745 07-07-2015 13:43

Close Save Save + New

General

Description ⚠

Active ☒

Stage	Delete	Description	Request type	Request status
1	✖	<input type="text"/> ⚠	<input type="text"/> ⚠	Open ▼
2	✖	<input type="text"/> ⚠	<input type="text"/> ⚠	Open ▼
3	✖	<input type="text"/>	<input type="text"/>	Open ▼
4	✖	<input type="text"/>	<input type="text"/>	Open ▼
5	✖	<input type="text"/>	<input type="text"/>	Open ▼
6	✖	<input type="text"/>	<input type="text"/>	Open ▼
7	✖	<input type="text"/>	<input type="text"/>	Open ▼
8	✖	<input type="text"/>	<input type="text"/>	Open ▼
9	✖	<input type="text"/>	<input type="text"/>	Open ▼
10	✖	<input type="text"/>	<input type="text"/>	Open ▼

2. Under the **General** section, type a description for the sales cycle at **Description**.
3. Select the **Active** check box to activate the sales cycle. If it is not selected, the sales cycle will not be available for linking to any opportunity.
4. Define the description, request type, and corresponding request status for each stage at **Description**, **Request type**, and **Request status** respectively. When the request status is reached, the next stage will begin.

Note:

- All fields with the "!" icon are mandatory.
- At least two stages, with request types linked to each stage, must be defined. This is mandatory.




5. Click **Save** to save the sales cycle, and then click **Close** to exit.

Caution:

You cannot delete a sales cycle definition when there are opportunities linked to it.

Scenario of how a sales cycle functions

In a sales cycle, each stage represents a major sales activity of your organization for the particular type of situation. The following is an example of a sales cycle:

Opportunities: Sales cycle - CRM Sales cycle   

[Close](#) [Edit](#) Created by [KEN LEONG](#) 29-09-2011 15:23
Modified by [KEN LEONG](#) 29-09-2011 15:23

General

Description CRM Sales cycle
Active ☒

Stage	Description	Request type	Request status
1	task	Checked task	Open
2	task	Checked task	Processed

When an opportunity is linked to a sales cycle, it will go through all the stages as specified in the sales cycle. Each stage will be represented by a request type. Although you can use existing request types, it is also advisable to create special request types that will be used for sales cycles only. This helps create data that is more meaningful when the sales cycle definitions are later analyzed in reports.

In the example, the first stage will be the **Prospecting** stage. When an opportunity is created and linked to this sales cycle, a request type **Task** will be created and sent to the relevant person. The opportunity will then be updated to the **Prospecting** stage. When the **Task** reaches the **Processed** status, the next request type, **Customer discussion**, will be created. The opportunity will be updated to stage two, which is the **Needs Analysis** stage.

With this method, the opportunity will go through all the relevant stages. When the request for the final stage is satisfied, the deal will be **Won**.



6.1.3 Defining opportunity sources

In order to add more information for opportunities, sometimes it is advantageous to specify how the opportunity was obtained. This can be done by specifying a source when an opportunity is created. The opportunities can then be viewed in reports as grouped by sources. This will highlight the effectiveness of the sources in creating opportunities, such as from trade exhibitions or conducting cold calls, and will allow you to focus on the more successful sources in the future to obtain more opportunities.

To create an opportunity source, function right **604 — Maintain opportunity master data** is required. Users with the **General manager**, **Customer manager**, and **Marketing manager** roles have this function right.

To define sources available for opportunities:


1. Go to Modules → Customers → Setup → Opportunity management → Sources, and then click **New**. You will see the following page:

Opportunities: New - Source  

[Close](#) [Save](#) [Save + New](#) Created by [Jo-Anna Goh Li Ping](#) 07-07-2015 13:46

Source

Code 

Description 

2. Under the **Source** section, type a code and description for the source at **Code** and **Description** respectively.
3. Click **Save** to save the new source, and then click **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

6.1.4 Creating contact roles

There should ideally be a person acting as a central point of contact for each opportunity. This person will provide all the information required with regards to the opportunity. The contact person will typically be an employee of the potential customer.

A contact person's role, such as a decision maker or an influencer, for an opportunity is specific to the opportunity only and the same contact person's role may change if a different opportunity materializes in the future. This is different from the job title of a contact person, which refers to the day-to-day operational responsibilities.

Identifying a contact person can help you to determine the status of the opportunity faster. In fact, depending on the nature of the business, you may want to register additional contacts since it may be possible that different contacts have different roles in a certain opportunity. This is done on the opportunity card.

To create a contact role, function right **604 — Maintain opportunity master data** is required. Users with the **General manager**, **Customer manager**, and **Marketing manager** roles have this function right.

To create contact roles:

1. Go to Modules → Customers → Setup → Opportunity management → Contact roles, and then click **New**. You will see the following page:

2. Under the **Contact roles** section, type a code and description for the contact role at **Code** and **Description** respectively.
3. Click **Save** to save the new contact role, and then click **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

6.1.5 Creating partner roles

Sometimes, organizations may attempt to approach an opportunity together with potential partners. This could be in the case if the partner is able to supply one part of the opportunity while your organization is able to supply another. Apart from that, partnering for opportunities can also be due to a financial or commercial arrangement, such as a requirement that local companies are required as partners when responding to opportunities in a foreign country. A partner can also be a representative who acts as the

reseller of your products. When an opportunity is identified, partners in any of these capacities can be invited to jointly pursue it.

As with contacts, you can also assign the partnering organization to have a certain role in a particular opportunity on the opportunity card. This will specify the role of the partner for the particular opportunity. As with the contact person's role, the partner's role may be different from one opportunity to another. Specifying the role will provide information on how the partner supports your organization for the opportunity and is done on the opportunity card. Examples of partner roles are organizations that are in the capacity of financial, strategic, or local partners. The employee should act as a contact person for the partner with regards to all things related to the opportunity.

To create a partner role, function right **604 — Maintain opportunity master data** is required. Users with the **General manager**, **Customer manager**, and **Marketing manager** roles have this function right.

To create partner roles:

1. Go to Modules → Customers → Setup → Opportunity Management → Partner roles, and then click **New**. You will see the following page:

2. Under the **Partner roles** section, type a code and description for the partner role at **Code** and **Description** respectively.
3. Click **Save** to save the new partner role, and then click **Close** to exit.

Note:

All fields with the "!" icon are mandatory.

6.1.6 Specifying reasons for losing opportunities

It is important to know the reasons for losing opportunities. Some of the possible reasons for losing opportunities include disagreement in price, compliance issues with local government requirements, or inability to meet specifications.

When an opportunity is lost, you will be able to specify the reason(s) in the opportunity card. The reason(s) for losing an opportunity can be used in reports at a later stage for analysis purposes. This determines the steps that can be taken to improve the chances of winning future opportunities.

To specify reasons for losing opportunities, function right **604 — Maintain opportunity master data** is required. Users with the **General manager**, **Customer manager**, and **Marketing manager** roles have this function right.

To specify reasons for losing opportunities:

1. Go to Modules → Customers → Setup → Opportunity management → Reasons lost, and then click **New**. You will see the following page:

2. Under the **Reason lost** section, type a code and description for the reason at **Code** and **Description** respectively.
3. Click **Save** to save the new reason for losing the opportunity, and then click **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

6.1.7 Defining free fields

Exact Synergy Enterprise allows you to define additional fields if some of the information that you want to record cannot be recorded in any of the existing fields. You can specify different types of fields, such as fields for entering dates, text, numbers, amount, and yes/no option. This allows you to customize Exact Synergy Enterprise further according to your business requirements.

To define free fields, function right **604 — Maintain opportunity master data** is required. Users with the **General manager**, **Customer manager**, and **Marketing manager** roles have this function right.

To define free fields:

1. Go to Modules → Customers → Setup → Opportunity management → Free fields. In the **Name** column, click on a free field according to the type of data that you will be recording. You will see the following page:

2. Type a description at **Label**. This is mandatory in order for the field to be activated. Select the option on how to index the free field at **Indexes**.
3. Click **Save** to save the new free field, and then click **Close** to exit.

6.2 CUSTOMIZING OPPORTUNITY CARDS

Every organization has its own specify business requirements. Some organizations may make it mandatory to capture certain information, while other companies may not want the same information. Opportunities may sometimes contain sensitive information that should not be made known to employees of an organization.

For instance, one of the requirements of an organization would be that users are required to enter the source of an opportunity. Another organization might require the source of an opportunity to be recorded without showing the opportunity history. Some of the information in the opportunity can be hidden and only be made visible to some of the users based on their roles. This can, for example, be used when you want to show all opportunities, without the amount fields, to your marketing staff. Apart from that, the management may also want to keep the proposed price hidden from other users before a deal has been signed. This is particularly true when dealing with a high value project with many competitors bidding for it.

Different organizations may also have different needs in tracking different types of information for an opportunity. As such, the opportunity card allows administrators to specify the mandatory fields that users are required to define.

To maintain the confidentiality of the opportunity card, you should be able to:

- customize the opportunity card for the different views,
- limit the access to the opportunity card, and
- specify the mandatory fields.

In customizing the opportunity card, you can do the following:


- display up to four columns of information. You can specify the opportunity card to display up to four columns of information.
- show or hide different sections or fields. You can click the corresponding check boxes to show or hide different sections or fields. This way, you can hide the fields that do not need to be filled.
- move and reposition sections. You can move and reposition the sections on an opportunity card. This is done by using the drag-and-drop feature.

6.2.1 Customizing opportunity cards (new mode)

You can customize the opportunity card to display only certain fields when an opportunity is created.

To customize the opportunity card in the new mode, the **Administrator** role is required.

To customize opportunity cards (new mode):

1. Go to Modules → Customers → Entry → Entry → Opportunity.
2. Click  **Customize** at the title bar. You will see the following page:

Opportunity: Customise - New

Created by Dinn Brands 17-02-2016 15:34
Modified by Dinn Brands 17-02-2016 15:34

Columns ☒ 1 ☐ 2 ☐ 3 ☐ 4

1

Columns ☐ 1 ☒ 2 ☐ 3 ☐ 4

1

☒ General

- ☒ Code
- ☒ Description
- ☒ Account
- ☒ Contact
- ☒ Owner 1 — Dinn Brands
- ☒ Project
- ☒ Probability (%)
- ☒ Planned amount
- ☐ Start date
- ☒ End date
- ☒ Follow-up date
- ☒ Source
- ☒ Sales cycle
- ☐ Security level 10
- ☐ Division 001 — Demo
- ☐ Cost centre 001CC001 — Default cost center

2

☒ Sales

- ☒ Currency
- ☒ Targeted assortment

☒ Remarks

☐ Free fields

☒ Date of agreement


3. Click the required option at **Columns** to display the opportunity card according to the selected number of buttons and field columns. Under the respective sections, select the check boxes to show the corresponding buttons, sections, and/or fields. Using the drag-and-drop feature, click on a section header and position it to your desired location.
4. Click **Save** to save the layout of the page for creating opportunity, and then click **Close** to exit.

6.2.2 Customizing opportunity cards (view mode)

You can customize the opportunity card to display only certain fields as well as restrict the access by different users to view certain information on an opportunity card.

To customize the opportunity card in the view mode, the **Administrator** role is required.

To customize opportunity cards (view mode):

1. Go to Modules → Customers → Reports → Opportunity management → Search, define the relevant criteria, and then click **Show**. Click an opportunity in the **Opportunity: Description** column to view the opportunity card.
2. Click  **Customize** at the toolbar. You will see the following page:

Opportunity: Customise - View

Close Save Reset Advanced

Created by Dinn Brands 02-10-2015 14:14
Modified by Dinn Brands 29-02-2016 14:23

Columns ☒ 1 ☐ 2 ☐ 3 ☐ 4

1

☒ Buttons

☒ View flow

☒ New: Document

☒ New: Request

Columns ☐ 1 ☒ 2 ☐ 3 ☐ 4

1

☒ Sales

☒ Code **Opp02**

☒ Description **Harley Resources**

☒ Owner **Dinn Brands**

☒ Account **Cafe Hout**

☒ Contact **James Brouw**

☒ Currency **EUR - Euro**

☒ Project **Project A&A**

☒ Planned amount **30,000.00**

☒ Expected amount **15,000.00**

☒ Targeted assortment

☐ Realized amount **0.00**

☒ Probability 50 %

2

☒ General

☐ Type **Customer**

☒ Start date

☒ End date **01-07-2016**

☒ Follow-up date

☒ Sales cycle **Sales cycle 1**

☒ Source **Source 1**

☒ Stage **Appointment (step 2 of 3)**

☒ Next stage **Follow-up**

☒ Deal **Undecided**

☒ Security level **10**

☐ Division **Demo**

☐ Cost centre **Default cost center**

☒ Monitor


3. Click the required option to select the number of columns at **Columns**. Under the respective sections, select the check boxes to show the corresponding buttons, sections, and/or fields.
4. Under the **Contacts** section, type the number of rows to be displayed for the relevant sections at **Rows**. Using the drag-and-drop feature, click on a section header and position it to your desired location.
5. Click **Save** to save the layout of the opportunity card view page, and then click **Close** to exit.

6.2.3 Customizing opportunity cards (edit mode)

You can customize the opportunity card to allow only certain fields to be edited as well as restrict the access by different users to edit certain information on an opportunity card.

To customize the opportunity card in the edit mode, the **Administrator** role is required.

To customize opportunity cards (edit mode):

1. Go to Modules → Customers → Reports → Opportunity management → Search, define the relevant criteria, and then click **Show**. Click an opportunity in the **Opportunity: Description** column to view the opportunity card. Next, click **Edit**.
2. Click  **Customize** at the toolbar. You will see the following page:

3. Click the required option to select the number of columns at **Columns**. Under the respective sections, select the check boxes to show the corresponding buttons, sections, and/or fields. Using the drag-and-drop feature, click on a section header and position it to your desired location.
4. Click **Save** to save the layout of the opportunity card edit page, and then click **Close** to exit.

6.2.4 Customizing opportunity card access


You can further customize the opportunity card by determining whether certain fields are required to be filled and limiting the access to the opportunity card to certain groups of users.

To determine whether certain fields are required to be filled, you can make the fields mandatory. Mandatory fields will force users to fill up the required information.

Due to security reasons, some organizations may require some fields to be edited by certain groups of employees only. This can be controlled by customizing the function right for each of these fields. By linking the function rights to these fields, only employees with those function rights can edit the fields.

To specify opportunity card mandatory fields, the **Administrator** role is required.

To specify mandatory fields:

1. Go to Modules → Customers → Entry → Entry → Opportunity.
2. Click  **Customize** at the toolbar, and then click **Advanced**. You will see the following page:

CRM: Opportunity - New

Close Save Reset

Mode Opportunity - New

Level ☒ Corporate ☐ Division

Created by Dinn Brands 02-10-2015 11:55


Modified by Dinn Brands 17-02-2016 15:34

General	Mandatory
Code	<input checked="" type="checkbox"/>
Description	<input checked="" type="checkbox"/>
Account	<input checked="" type="checkbox"/>
Contact	<input checked="" type="checkbox"/>
Owner	<input type="checkbox"/>
Project	<input type="checkbox"/>
Probability (%)	<input checked="" type="checkbox"/>
Planned amount	<input checked="" type="checkbox"/>
Start date	<input type="checkbox"/>
End date	<input checked="" type="checkbox"/>
Follow-up date	<input type="checkbox"/>
Source	<input checked="" type="checkbox"/>
Sales cycle	<input checked="" type="checkbox"/>
Security level	
Division	
Cost centre	
Sales	Mandatory
Currency	<input checked="" type="checkbox"/>
Targeted assortment	<input type="checkbox"/>
Remarks	Mandatory
Remarks	<input type="checkbox"/>
Free fields	Mandatory
Date of agreement	<input type="checkbox"/>





3. Select the level that you want to control the access to, on the opportunity card view page at **Level**. Select the relevant check boxes to make the corresponding fields mandatory. You cannot select the check boxes that are grayed out. These fields are disabled because the system has determined them as mandatory fields.
4. Click **Save** to save the access specifications to the opportunity card, and then click **Close** to exit.

To customize the access to the opportunity card in the view mode, the **Administrator** role is required.

To customize access to opportunity cards (view page):

1. Go to Modules → Customers → Reports → Opportunity management → Search, and then click **Show**. In the **Opportunity: Description** column, click an opportunity to view the opportunity card.
2. Click  **Customize** at the title bar, and then click **Advanced**. You will see the following page:
















CRM: Opportunity - View

Close Save Reset

Created by [Angel Chan](#) 26-05-2016 15:59
Modified by [Angel Chan](#) 26-05-2016 15:59

Mode Opportunity - View
Level ☒ Corporate ☐ Division

Sales	Function rights
Code	<input type="text"/> 
Description	<input type="text"/> 
Account	<input type="text"/> 
Contact	<input type="text"/> 
Owner	<input type="text"/> 
Project	<input type="text"/> 
Currency	<input type="text"/> 
Planned amount	<input type="text"/> 
Probability (%)	<input type="text"/> 
Expected amount	<input type="text"/> 
Targeted assortment	<input type="text"/> 
Realized amount	<input type="text"/> 
Contacts	Function rights
Contacts	<input type="text"/> 
Maintain - Contacts	<input type="text"/> 
Opportunity history	Function rights
Data: Log	<input type="text"/> 
Sales cycle history	Function rights
Graph	<input type="text"/> 

3. Select the level you want to control the access to, on the opportunity card view page at **Level**. Type or select the function right applicable for the corresponding fields. This will ensure that only people with the specified function right can view the corresponding fields.
4. Click **Save** to save the access specifications to the opportunity card, and then click **Close** to exit.

Opportunities are generated from various sources, such as marketing campaigns, trade shows, referrals from partners and resellers, online requests, and a customer database of your targeted markets. Each opportunity is linked to an account and more than one opportunity can belong to the same account. For example, a potential customer is interested in a product that he saw in a tradeshow. The potential customer then makes an appointment with an account manager of the company that offers the product. During the visit, the customer is also introduced to the whole range of products, in addition to the product that he is interested in. The customer then becomes interested in the other products too. In this case, there is more than one opportunity that is linked to an account.

When you have set up the master data required, and customized the access and view of the opportunity cards (see *Chapters 6.1 Organizing Opportunities* and *6.2 Customizing Opportunity Cards*), you can start to register the information of the opportunities. For a start, you can capture some of the basic information, such as the account the opportunity is linked to, the sales cycle definition, the security level of the opportunity card, and the owner of the opportunity card.

6.3.1 Entering new opportunities

With opportunities generated from various sources, you can proceed to capture the opportunity information on the opportunity cards in Exact Synergy Enterprise. With the opportunity cards, you can maintain the information on your opportunities, analyze sales data, and track the sales cycle process for these opportunities.

For these purposes, mandatory information, such as the code and description of the opportunity, the account that the opportunity is linked to, the sales cycle definition and the currency, must be entered when you create the opportunity card. The opportunity code can be automatically generated using the batch creation function.

If the batch creation function is not enabled, you need to manually enter a code for the opportunity that you want to create. For more information, see *Chapter 6.3.2 Creating multiple opportunities*.

It is necessary that you select the owner of the opportunity card to indicate the person responsible for the sales activities in the workflow for this opportunity. Some of these activities include maintaining good customer relationships, finding out the customers' requirements, product presentations, and contract negotiations. It is also possible that the owner of the opportunity receives a commission based on the opportunities won.

Choosing the correct sales cycle definition for an opportunity determines the sales process that the opportunity will have to go through in order to convert the opportunity into a success. The sales cycle definition lists the sequence of stages involved in a specific sales process. As the relevant people complete the workflow requests in the respective stages of the sales process, the progress is automatically reflected on the opportunity card. When the last request in the workflow is processed, the opportunity is set to **Won**. For more information on setting up sales cycle definition, see *Chapter 6.1.2 Creating sales cycle*.

Although the start and end dates are not mandatory information, it is useful to specify limits in the project planning for the opportunity. The start date can be used to indicate when the sales activities are expected to start or have started for the opportunity. You can also specify the end date for the opportunity. Doing so will indicate the date whereby the opportunity is closed and the potential revenue can be expected.

In order to register the revenue from won opportunities and the cost of sales activities, you can specify the division and cost center for the opportunity card. This will enable accuracy of reporting the revenue from won opportunities and cost allocated to the sales activities carried out to win the opportunities. After creating the basic information for your opportunities, you can still modify the opportunity card with further information when progress is made in the sales cycle process for the opportunities.

All users can create opportunities.

To create opportunities:

1. Go to Modules → Customers → Entry → Entry → Opportunity. You will see the following page:


2. Under the **General** section, type the code at **Code**.

Note:

The system will generate a code here if you have enabled the opportunity codes to be generated automatically. For more information on the auto-generation of opportunity codes, see *Chapter 6.1.1 Assigning opportunity codes*.

3. At **Description**, type a description for the opportunity card.
4. Type or select an account at **Account**. It is mandatory that an opportunity card is linked to an account.
5. At **Contact**, select the main contact person for this opportunity.
6. By default, the name of the creator is filled at **Owner**. If the owner of the opportunity is different from the creator of the opportunity card, you can change the person in this field by typing or selecting the ID of the actual owner.
7. At **Project**, type or select the project code to indicate main project for this opportunity.
8. At **Probability (%)**, fill in the value to specify the probability of winning the opportunity.
9. At **Planned amount**, fill in an amount, which is the amount of revenue you expect to gain from winning the opportunity.
10. Select an end date at **End date**. The end date indicates the date the opportunity is considered to be closed.
11. Select a date to follow up on the opportunity at **Follow-up date**. However, this information shall not be validated by the system. Hence it can also be a past date.
12. Select a source at **Source**. The source indicates how the opportunity was created or where it originated from.
13. Type or select the relevant sales cycle definition at **Sales cycle**.
14. Under the **Sales** section, **Currency** is automatically filled based on the currency defined in the account that you select at **Account**. If the currency is not defined on the account card, **Currency** is automatically filled based on the currency used in the country of the account. You can also manually type or select a currency that will be used by the opportunity card.
15. At **Targeted assortment**, type or select an assortment to indicate the assortment for which the opportunity is targeting.
16. Click **Save** to save the information, and then click **Close** to exit.

Note:

- All fields with the “!” icon are mandatory.
- Some of the columns, sections, fields, and mandatory fields might differ for different users depending on the customization of the opportunity entry page. To customize the mandatory fields on the opportunity entry page, click  **Customize**.

6.3.2 Creating multiple opportunities

There could be many opportunities generated within a short period of time as a result of a successful marketing campaign, or referrals sourced from the extensive customer database of partners and resellers. Capturing opportunity information for such a large volume of opportunities by creating an entry for each and every account might require a considerable amount of time and manpower. Thus, in this case, it is more efficient to create a batch of similar opportunities to be linked to the respective accounts.

You are able to create a batch of opportunities for a group of accounts using the batch creation function in Exact Synergy Enterprise. This feature is particularly useful if you have a set of products that you want to market and sell to a targeted group of customers. You can do this by first searching for the relevant accounts that you want to create the opportunities for. The next step is to enter the basic information for a batch of opportunity cards. Finally, you create the opportunities based on the information for the set of selected accounts.

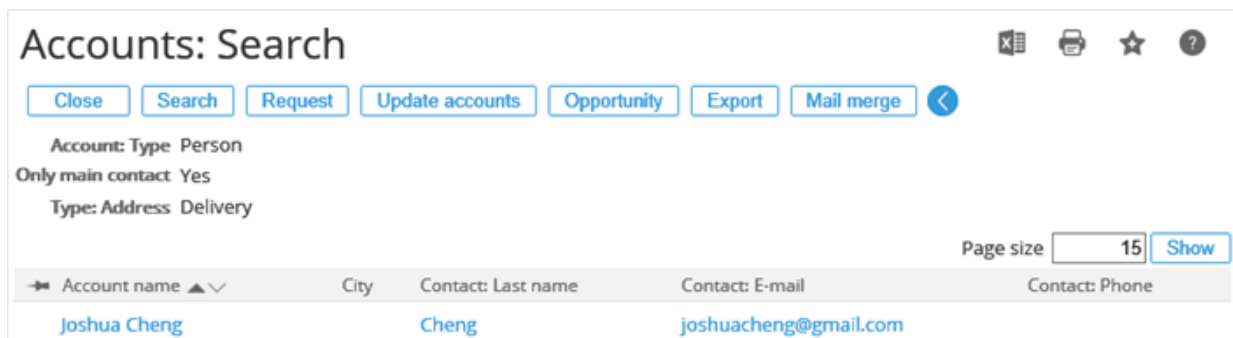
Note:

To use the batch creation function for creating opportunities in bulk, you must first enable and set up the naming convention for the automatic generation of opportunity codes. For more information, see *Chapter 6.1.1 Assigning opportunity codes*.

All users can create multiple opportunities using the batch creation function.

To create a batch of opportunities:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant criteria for the accounts you want to create opportunities for, and then click **Show**. You will see the following page:



Accounts: Search

Close Search Request Update accounts Opportunity Export Mail merge

Account: Type Person
Only main contact Yes
Type: Address Delivery

Page size 15 Show

Account name	City	Contact: Last name	Contact: E-mail	Contact: Phone
Joshua Cheng		Cheng	joshuacheng@gmail.com	

2. On the **Account: Search** page, click **Opportunity**. You will see the following page:

3. Under the **Criteria** section, select a method that will be used to create the batch of opportunities for the selected accounts. The methods available are:
 - **Via: Process - Background** — This option will create opportunities via a background process that can be set up using the task scheduler.
 - **Directly** — This option will allow you to create opportunities immediately upon clicking **Create opportunity**. Based on the system settings, this will be disabled if the total number of accounts from the search results exceeds the maximum number of opportunities that can be created per batch creation.
4. Under the **General** section, type the description for the batch of opportunities that you want to create at **Description**.
5. By default, the name of the creator is entered at **Owner**. If the owner of the opportunity is different from the creator of the opportunity card, you can change the person in this field by typing or selecting the ID of the actual owner.
6. At **Security level**, type the security level for the opportunity card to control the access to the opportunity information. Users with the security level higher than or equivalent to the security level of the opportunity card will be able to view the opportunity information.
7. Type or select a sales cycle definition at **Sales cycle**.
8. In order to trace the opportunities from a similar marketing campaign, trade fair, or a product launch event, type or select a project code for the opportunity at **Project**. This is useful if you need to search or generate reports for opportunities that are generated from a certain project.
9. By default, the division and cost center of the owner are defined at **Division** and **Cost center** respectively. To change this information, type or select the division and cost center in which the opportunity belongs to.
10. Under the results section, you can indicate that you want opportunities created for selected accounts only. To do this, first clear all the check boxes by clicking the check box in the column header. Then, select the check boxes corresponding to the relevant accounts. Alternatively, you can clear only the check boxes for accounts that you want to exclude from the batch creation processing.
11. Click **Create opportunity** to start the batch creation process. If there is mandatory information required in the first workflow request of the linked sales cycle definition, you need to enter the information for the fields under the **Mandatory fields for sales cycle request** section. Then, click **Create opportunity** again.

Note:

- All fields with the “!” icon are mandatory.
- After clicking **Create opportunity**, you will receive the batch creation status report. If you have selected method **Via: Process - Background**, you will see the message “Your request is sent for processing. 00.000.131 - Status: Report”. A workflow task will be sent to the user (task creator) with an attachment of the batch creation report in Microsoft Excel format. If you have selected the method **Directly**, you will immediately see the batch creation status report after clicking **Create opportunity**.

12. Once the batch creation processing is complete, there will be an opportunity card linked to each account selected for the batch creation processing.
13. Click **Close** to exit.

6.4 FOLLOWING-UP ON OPPORTUNITIES

When sales activities are carried out, changes in the opportunity information and status are expected. The changes in the opportunity information need to be recorded and updated on the opportunity card so that you can get a current overview of the opportunities, the sales forecast, and the historical data of the opportunities.

The probability of winning might change as you progress through the stages of the sales cycle for the opportunity. You can track the progress of the opportunity and update the probability of winning at different stages of the sales cycle. Usually, the probability of winning a deal is higher if you have reached a more advanced stage of the sales cycle.

After negotiations with the customer, the expected amount might change if the customer requests for a lower price than your expected quotation earlier, or if the customer is interested in any products and services other than the targeted assortment of items. Therefore, it is important to update these changes in the opportunity card so that you can analyze the potential revenue and compare that to the targeted revenue. You will then be in a better position to know which opportunities are worth pursuing and are able to measure your performance based on the sales target.

Besides being the main source of opportunity information, the opportunity card is also able to record the history of the activities related to the opportunity. Changes in the planned, expected, and realized amount are captured under the **Opportunity history** section of the opportunity card. You can then use this information to keep track of the changes in the planned amount. You might also want to update the probability of winning from time to time as an indication on the overall progress of the opportunity. The expected amount, which gives you the revenue that you can expect to generate based on the probability of winning, is calculated by multiplying the probability and the planned amount for the opportunity.

Under the **Sales cycle history** section of the opportunity card, you are able to analyze the changes in the planned amount, probability, or expected amount at every stage of the sales cycle definition. This is useful in giving you an idea of how the negotiations are progressing and the ability to estimate the amount of revenue that might be generated.

6.4.1 Viewing opportunity data

To view the opportunity card, the following security level is required:

The security level of the user must be higher or the same as the security level of the opportunity card.

- The user is the creator of the opportunity.
- The user is owner of the opportunity.
- The user is the manager of the owner of the opportunity.
- The user is currently involved in a request which is linked to the opportunity. This also includes people who are involved in the request through the **Assume**, **Assign**, and **Remark** functions.

To view statuses of opportunities:

1. Go to Modules → Customers → Reports → Opportunity management → Search. Define the relevant criteria for the opportunities you want to view, and then click **Show**. You will see the following page:

Opportunities: Search

Close Search

Only main project No

Page size 15 Show

Account	Opportunity: Main Project	Opportunity: Description	Opportunity: Targeted assortment	Opportunity: Stage	Opportunity: Owner	Opportunity: Follow-up date
Cafe Hout	20003	Cold Call	Standaard	2 - Appointment	Dinn Brands	10-01-2015
Cafe Hout	PROAA	Harley Resources	Producten	2 - Appointment	Dinn Brands	
Cafe Hout		Calibre Management Ltd		2 - Face-to-face meeting	Dinn Brands	

2. Click the hyperlink in the **Opportunity: Description** column to view the respective opportunity card.
3. At the opportunity card header, you can see the status of the opportunity and the stage of the sales cycle process that the opportunity is in. You can also check the status of the opportunity at **Deal** on the opportunity card.

Opportunity card: Opp02, Deal: Undecided / Stage: Appointment

Close Edit View flow Lost New: Document

Created by Dinn Brands 15-01-2016 09:32
Modified by Dinn Brands 27-05-2016 11:49

Sales Code Opp02 Description Harley Resources Owner Dinn Brands Account Cafe Hout Contact James Brouw Currency EUR - Euro Project Project A&A Planned amount / Probability EUR 30,000.00 50 % Expected amount EUR 15,000.00 Targeted assortment Producten	General Start date End date 01-07-2016 Follow-up date Sales cycle Sales cycle 1 Source Source 1 Stage Appointment (step 2 of 3) Next stage Follow-up Deal Undecided Security level 10
---	---

Documents Projects Workflow
Reports Quotations

Contacts All Add

Mr. James Brouw - Sales manager
Mr. Joshua Cheng - --

Opportunity history All

Deal	Stage	Planned amount	Probability (%)	Modified
Undecided	Cold call	30,000.00	50	Dinn Brands 15-01-2016 09:34
Undecided	Appointment	30,000.00	50	Dinn Brands 15-01-2016 09:34

Requests

✓ 00.000.421 15-01-2016 09:34 Approved Appointment

Creator: Dinn Brands Person: Dinn Brands

?:
?:

4. Click **Close** to exit.

6.4.2 Changing opportunity statuses

The opportunity is linked to the stages of the sales cycle, where the sequence of stages is tied to the corresponding requests. There is a status defined for each request in the sales cycle which will mark the completion of the current stage in the sales cycle. The completion of a request in a sales cycle stage will trigger the start of the request for the next stage, and so forth until the final request in the sales cycle is acted upon.

At any stage where the request is still in progress, the status of the opportunity will be set to **Undecided**. You can trigger the status of a failed opportunity from **Undecided** to **Lost** by clicking **Lost** on the opportunity card.

When you have clicked **Lost**, the requests generated for the sales cycle of the opportunity that have not been completed will be rejected.

It is possible to change the status from **Lost** to **Undecided** again by reopening the request at the stage of the sales cycle when the opportunity was lost. Alternatively, you can just click **Reopen** on the opportunity card. If a favorable outcome is achieved and the final request within the sales cycle is completed, then the status of the opportunity will change from **Undecided** to **Win**.

6.4.3 Updating opportunity card information

To edit the opportunity card, the following security level is required:

- The user is the creator of the opportunity.
- The user is the owner of the opportunity.
- The user is the manager of the owner of the opportunity.
- The user is currently involved in a request which is linked to the opportunity. This also includes people who are involved in the request through the **Assume**, **Assign**, and **Remark** functions.

To update information in opportunity cards:

1. Go to Modules → Customers → Reports → Opportunity management → Search. Define the relevant search criteria, and then click **Show**. Click the relevant hyperlink in the **Opportunity: Description** column to view the respective opportunity card.
2. Click **Edit**. You will see the following page:

3. After registering your changes on the opportunity card, click **Save**, and then click **Close** to exit.

6.4.4 Closing opportunities

As in all business deals, you may find your customers accepting or rejecting your business proposal at any stage of the sales cycle. For either case, you will need to close the opportunity in Exact Synergy Enterprise. Finalizing the last request in the sales cycle will set the opportunity from **Undecided** to **Won**. When the opportunity status is set to **Won**, you may want to fill the realized amount on the opportunity card.

Note:

The last request of the sales cycle is finalized when it reaches the status as defined in the sales cycle definition.

However, when a decision has been made by the customer to reject your company's offer, the opportunity can then be considered lost. There are also internal reasons for losing an opportunity, such as a low probability of winning the opportunity, a very high investment, or too many people are needed for a small opportunity. You can set the status of an opportunity card to **Lost** by clicking **Lost** when viewing the opportunity card. The status of the opportunity will change from **Undecided** to **Lost**. You can then record the competitor the opportunity was lost to and the reason for losing the opportunity.

To edit the opportunity card, the following security level is required:

- The user is the creator of the opportunity.
- The user is the owner of the opportunity.
- The user is the manager of the owner of the opportunity.
- The user is currently involved in a request which is linked to the opportunity. This also includes people who are involved in the request through the **Assume**, **Assign**, and **Remark** functions.

To close opportunities with the status **Won**:

1. Go to Modules → Customers → Reports → Opportunity management → Search. Define the relevant search criteria, and then click **Show**. Click the relevant hyperlink in the **Opportunity: Description** column to view the respective opportunity card.
2. Click **Edit**. Type the realized amount for the opportunity at **Realized amount**. This information is mainly used for reporting purposes.
3. Click **Save** to save the changes, and then click **Close** to exit.

To close opportunities with the status **Lost**:

1. Go to Modules → Customers → Reports → Opportunity management → Search. Define the relevant search criteria, and then click **Show**. Click the relevant hyperlink in the **Opportunity: Description** column to view the respective opportunity card.
2. Click **Lost**. Type or select the reason for losing the opportunity at **Reason lost** and the competitor that the opportunity was lost to at **Lost to competitor**.
3. Click **Save** to save the changes, and then click **Close** to exit.

Note:

- The reason for losing the opportunity and the competitor that the opportunity was lost to are mandatory if you have made them mandatory in your settings (under the **Opportunity lost** section at Modules → Customers → Setup → Opportunity management → Settings). If these fields are made optional, you can fill in the information in the edit mode of the opportunity card. These fields are only available when your opportunity status is **Lost**. Only competitors that are defined under the **Competition** section are available for selection.
- It is also possible to set an opportunity to the **Lost** status by rejecting the sales cycle request to which it is linked. The message “Do you want to set the opportunity to lost?” will be displayed. Then, click **Yes**.

6.5 REPORTS

There is a lot of information that is stored in the opportunity cards and the information can be used to generate reports that are useful in making decisions related to the management of your sales cycle.

The opportunity reports in Exact Synergy Enterprise use information in the opportunity cards to present details of the individual opportunity in the sales cycle as well as provide an overview of the entire sales cycle. These reports contain information, such as the sales cycle history, current status of the sales cycle, and the sales funnel.

Opportunity reports can be used to evaluate the various strategies used in marketing campaigns and activities within the sales cycle process. For example, a report that shows a comparison of the sales targets achieved by the sales personnel will help a sales manager to evaluate the performance of the sales personnel and identify the support and training required to improve their performance.

Furthermore, the opportunity reports are available in several formats and users can choose the format that best suits their needs. For instance, if you want to get an overview of the current sales process and future sales forecast, you can use the sales funnel report which presents the opportunity information in a sales funnel graph. If you are a new user who is not familiar with the software or if you are want generic reports available immediately, you can set up standard dashboard reports that can be accessed from the workspace. If you want a more advanced analysis of the opportunity information, you can use the pivot analysis.

6.5.1 Sales funnel reports

The sales funnel report allows you to get an overview of the opportunities in your sales cycle. This information is presented per sales cycle definition.

All users can access the sales funnel report.

To view opportunity information with the sales funnel report:

1. Go to Modules → Customers → Reports → Opportunity management → Sales funnel. You will see the following page:

Opportunities: Sales funnel

Close Show Reset

^ General

Sales cycle [] [Warning icon]

Deal All

Division []

End date <Range>

Presentation Horizontal

Size Large

Owner []

Group []

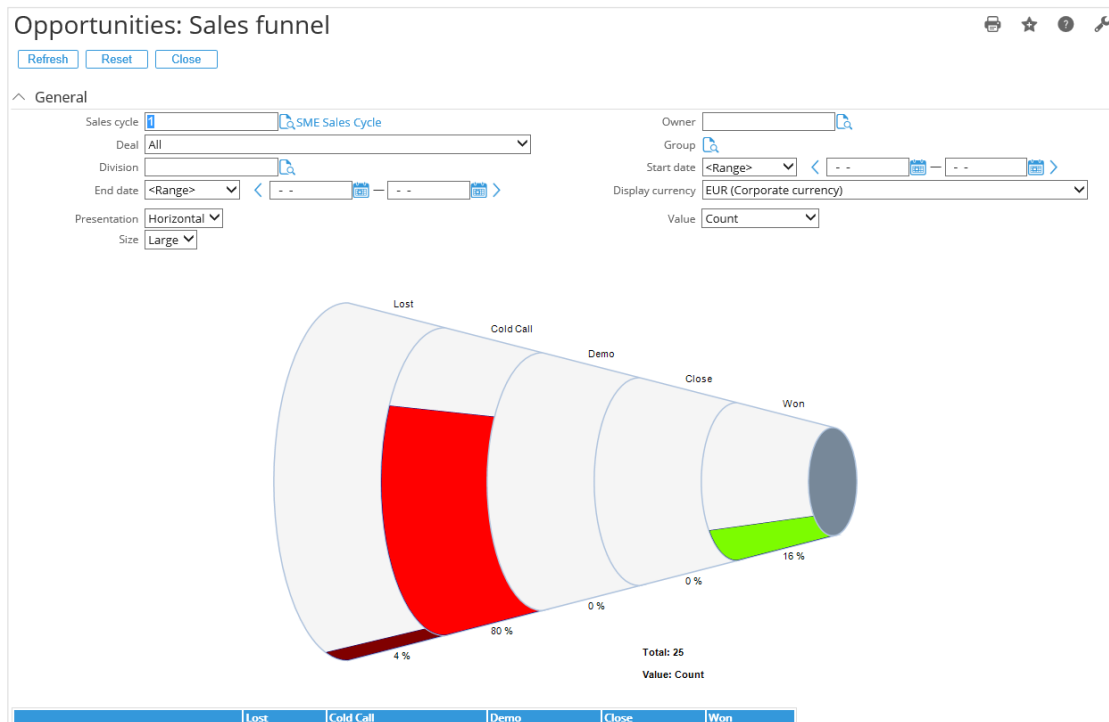
Start date <Range>

Display currency EUR (Corporate currency)

Value Count

2. Then, select or type the sales cycle definition at **Sales cycle** under the **General** section to display the opportunities that are linked to the sales cycle.
3. You can also define the relevant criteria to display the relevant opportunity information in the sales funnel report. Select the necessary criteria for the layout of the report.

4. Click **Show** to generate the report. See the following example of the report:



Note:

- All fields with the "!" icon are mandatory.
- The report will display the opportunities according to the current stages of the opportunities in the sales cycle process for the selected sales cycle definition. The sample report shows the percentage of the number of opportunities at each stage of the sales cycle. You can also choose to display the percentage based on other types of values, such as the planned amount, expected amount, and realized amount. You can see the total number of opportunities at **Total**: and the type of values used at **Value**. The table below the sales funnel displays the various stages of the sales cycle and the corresponding value at each stage.

6.5.2 CRM reports

The CRM reports consist of 10 standard report templates that you can set up and access in the workspace. The information in these reports is presented in a widget form and per sales cycle definition.

Adding opportunity report templates to the workspace


The following report templates are available to be added to the workspace:

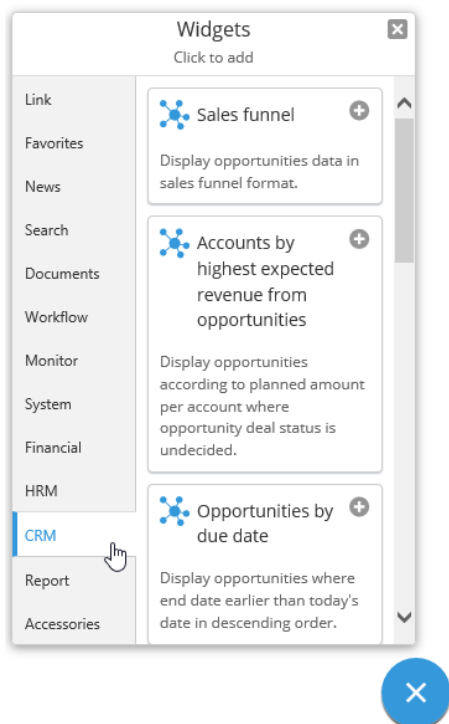
- **Sales funnel** — This displays the opportunity data in a sales funnel graph.
- **Accounts by highest expected revenue from opportunities** — This displays accounts linked to opportunities with the deal status **Undecided**, by the planned amount per account in descending order.
- **Opportunities by due date** — This displays the opportunities with end dates that are earlier than the current date, by the end dates in descending order.
- **Overdue opportunities** — This displays opportunities with end dates that are earlier than the current date, by the end dates in ascending order.
- **Latest opportunities lost** — This displays opportunities with the deal status **Lost**, by the dates when the opportunities were lost in descending order.

- **Opportunities won by highest revenue** — This displays opportunities with the deal status **Won**, by the realized amount in descending order.
- **Number of undecided opportunities per targeted assortment** — This displays the number of opportunities with the deal status **Undecided** per targeted assortment. The results are sorted by the targeted assortments in ascending alphabetical order.
- **Expected revenue per targeted assortment** — This displays assortments that are targeted by opportunities with the deal status **Undecided**, by the planned amount per targeted assortment in descending order.
- **Latest opportunities** — This displays the most recent opportunities created, by the dates when the opportunities were created in descending order.
- **Number of opportunities per subordinate** — This displays the number of opportunities per owner, by the names of the owners in ascending alphabetical order.

All users can access the reports.

To add opportunity report templates and define the property and layout settings:

1. Go to the workspace by clicking the company logo at the top left of the page, and then click  **Add widget** at the bottom right of the page.
2. Then click the **CRM** tab. You will see the following page:



3. Under the **CRM** tab, you will see a list of predefined report templates. Click the respective report. The **Add: [Name of the report]** page will be displayed.
4. Type the title of the report, and link it to a sales cycle.
5. Define other information, if required.
6. Click **Save**. The report template will then be displayed as a widget in the workspace.

Note:

You have to define these settings per report.

Modifying properties and layout settings of opportunity reports in the workspace

You can modify the settings for these reports.

To modify settings of reports in the workspace:

1. Go to the workspace by clicking the company logo on the top left of the page.
2. Click  **Edit** at the header of the widget. The **Edit: [Name of the report]** page will be displayed.
3. Specify the relevant criteria for the properties and layout of the report.
4. Click **Save** to save the changes or **Cancel** to exit without saving the changes. After clicking **Save**, you will see the report with the implemented changes in the workspace.

To remove reports from the workspace:

1. Go to the workspace by clicking the company logo on the top left of the page.
2. Click  **Edit** at the header of the widget. The **Edit: [Name of the report]** page will be displayed.
3. Click  **Delete** at the header of the page. The message “Are you sure you want to delete this widget?” will be displayed.
4. Click **Yes**. The report will then be removed from the workspace.

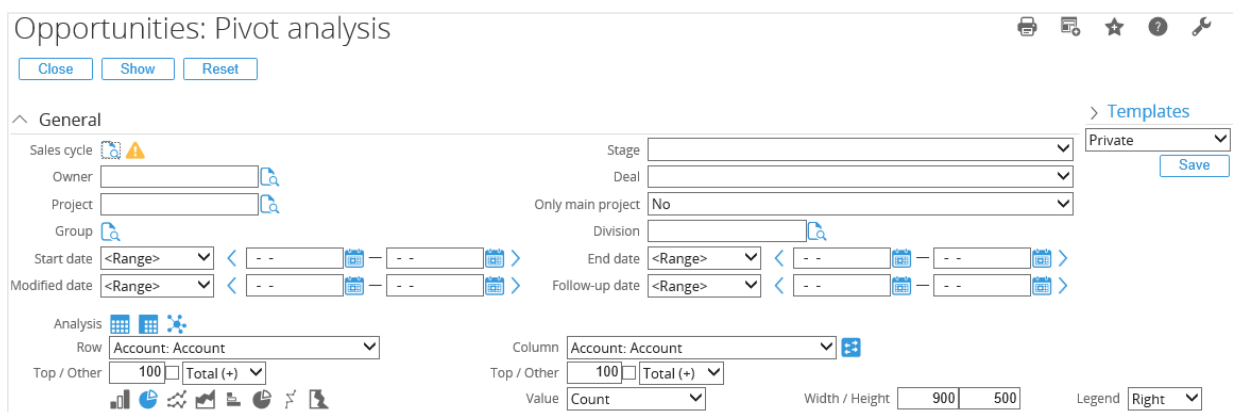
6.5.3 Pivot analysis

You can use the pivot analysis to generate more complex reports. These reports usually contain information that is more specific to your business. For example, it may be a pivot analysis of the sales targets achieved by your sales staff, or a report on the market demand for different types of products.

All users can access the pivot analysis report.

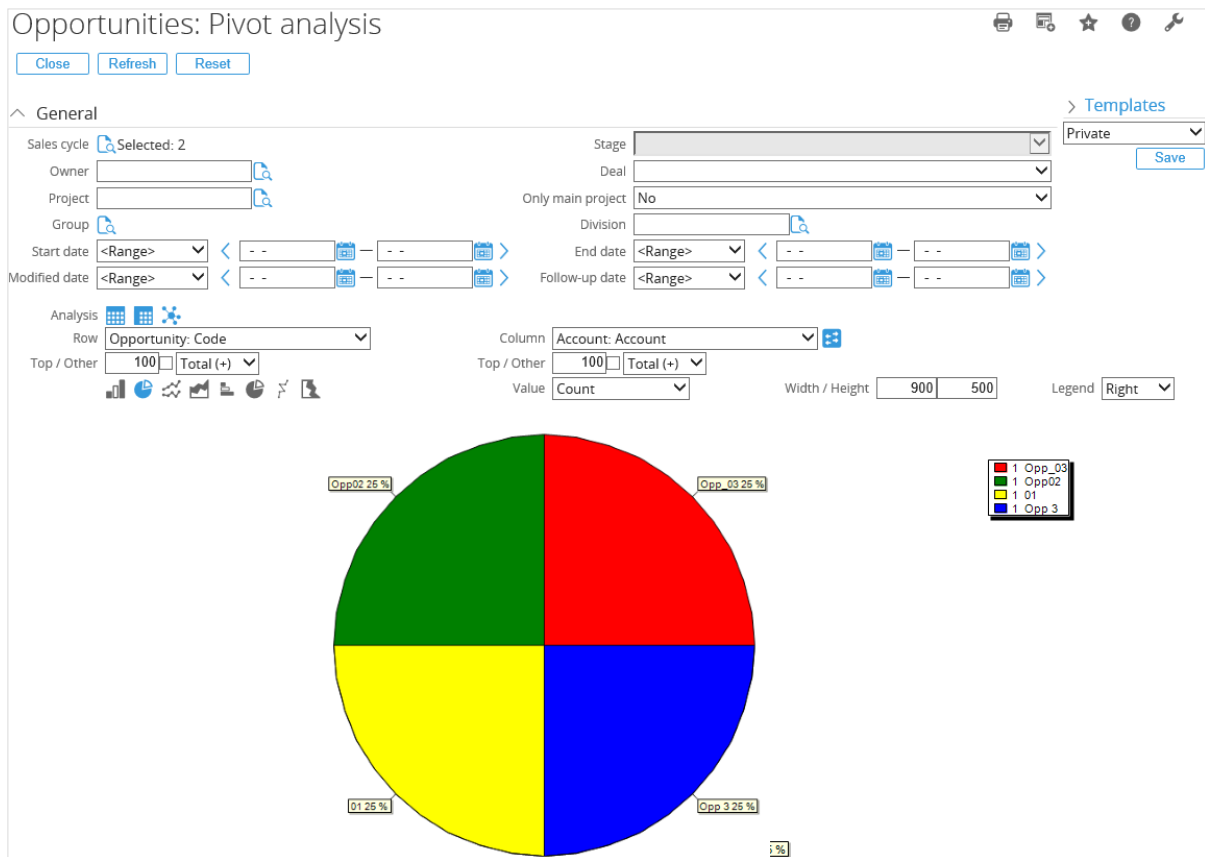
To view opportunity information using the pivot analysis:

1. Go to Modules → Customers → Reports → Opportunity management → Pivot analysis. You will see the following page:



2. At **Sales cycle** under the **General** section, type or select the sales cycle definition.
3. Define other relevant criteria for the layout of the pivot analysis report.

4. Click **Show** and you will see the pivot analysis report with the defined criteria. The following is a sample report, which is the number of opportunities grouped by opportunity code per account displayed in a vertical pie chart.

**Note:**

All fields with the "!" icon are mandatory.

7. CUSTOMER SUPPORT AND SERVICE

Now that the sale has been made and the financial processes are taken care of, you have a new customer who is beginning to use your products or services. It is important that this customer is happy to conduct business with you and wants to conduct business with you again. One of the methods to ensure a good relationship with your customers is to support the use of the products or services sold. This means the relationship between you and the customer has to be maintained. One of the ways to build up a strong relationship with your customers is to provide service and support that meet or exceed the expectations of customers. This is an important part in your customer relationship management (CRM) strategy.

The customer should be able to contact your company with suggestions, questions, and complaints. These should be handled efficiently and according to the agreed-upon service level.

This section will describe the implementation of a web-based self-service portal for customers that will allow your customers to search for relevant information themselves. Besides the customer portal, this chapter also describes the use of contract management, customer satisfaction measurement, support management, and complaint management.

Business benefits:

- Quick and effective handling of complaints reduces customer dissatisfaction.
- Quick handling of questions improves customer satisfaction.
- Keeps your customers informed using direct and target marketing, especially providing latest happenings in a customer portal, which improves your relationship with them.
- Measuring customer satisfaction provides information to improve your business processes.
- The availability of a customer portal reduces the pressure on your organization and provides the customer the opportunity to search for all information and to enter their questions at any time and any place.

7.1 CONTRACT MANAGEMENT

One of the final steps in creating and maintaining an optimized CRM environment is contracts. Contracts are an excellent and necessary tool to provide maximum service to the customer and insight for the company.

A contract in Exact Synergy Enterprise is made up of a contract header and its corresponding contract lines.

This includes not only the type of service and support agreement, but also other relevant information, such as other components or add-ons to the product bought.

Existing contracts can be prolonged. Prolongation of the contract is done based on extending the service and support periods for the service items that are linked to the contract. This is carried out as a process and the result of this can be sent to a back-office application. The application can then generate invoices to be sent to customers.

An example of this is the sale of a coffee machine. The coffee machine will be recorded in the contract header part while its components, such as the boiler and pistol, will be recorded in the contract lines. The annual fee the user has to pay for support and maintenance of the machine is recorded in the contract lines as well.

Business benefits:

- Provides maximum service to the customers and maximum insight for the company.
- Invoices customers automatically in defined periods.

7.1.1 Setting up new contracts

Setting up contracts in Exact Synergy Enterprise is directly related to another module, namely **Logistics**.

Logistics allows you to maintain items and assortments. These items are very important in the process of setting up new contracts. We will start by explaining how items and assortments can be configured for use with contracts.


Since the creation of contracts can only be done if the appropriate data is available, the following prerequisites must be satisfied:

- **Users with sufficient rights** — Not all users are allowed to maintain contracts. By default, the rights needed to create and maintain contracts are included in the **F&A Staff** role. Take note that additional function rights are required for maintaining other sections which are needed as a prerequisite. Using the **Administrator** role allows you to execute all steps required for this section.
- **One or more existing accounts** - There needs to be existing accounts of type **Customer** or **Reseller** since contracts can only be created for **Customers** and **Resellers**.
- **One or more existing assortments and items** — There needs to be at least one active existing assortment and item because both are needed in order to create a new contract.
- **Background job Exact.Process.exe** — In order to use the prolongation function, the background job **Exact.Process.exe** must be triggered for the **Exact.Jobs.ConProcess.dll** process. This can be done by scheduling the job via the SQL Server Agent. More information about scheduling this job can be found in Exact Synergy Enterprise **Implementation Manual**.
- **Contract number setup** — It is possible to automatically generate contract numbers. The automatic contract numbers can be set up under the **Contracts** section at Modules → Logistics → Setup → Settings → Settings. Setting up a new contract requires item management. Items and assortments have to be set up so that they can be used in contracts. This applies to items that will be at the contract header as well as contract lines.

To define an assortment, function right **217 — Maintain Item assortment** is required. Users with the **Item management** roles have this function right.

To define assortments for contract use:

1. Go to Modules → Logistics → Setup → General → Assortments. Click the appropriate assortment in the **Code** column.

Contract	
Used in: Contracts	<input checked="" type="checkbox"/>
Allow: New - Contract	<input checked="" type="checkbox"/>
Item - Selection	<input type="text" value="Items.ItemCode='LMFG0000'"/>
Program - ID	<input type="text"/>
Parameter	<input type="text"/>
Document	
Security level	<input type="text" value="Internal"/> <input type="text" value="10"/>

2. Under the **Contract** section, select **Used in: Contracts** check box to allow the assortment to be used when creating contracts.
3. Select **Allow: New – Contract** check box to allow the assortment to be used only once for new contracts.
4. At **Item – Selection**, type an item selection to create a main contract item for the assortment whereby the main contract item can be linked to the contracts. For example, to create a main contract item with item code “DB0101”, type Items.ItemCode = ‘DB0101’. However, define the item selection only if one main contract item is used for an assortment.
5. At **Program – ID**, type a program ID to generate vouchers. For example, “eVoucher.Document”. You will have to run a customized file, such as **Exact.Contract.Voucher.Dll**, to generate vouchers.
6. At **Parameter**, type a parameter to generate passwords for the products.
7. At **Document**, select a document path for the assortment.
8. At **Security level** - Select the security level for the assortment used in contracts. The security level will change once the security type is selected. For example, if **Internal** is selected, the security level will change to “10”. The security level determines whether the user is allowed to view the assortment in the contracts. The security types available are:
 - **All** — Select this option to allow all users to view the assortment in the contract.
 - **Customers** — Select this option to allow only customers to view the assortment in the contract.
 - **Partners** — Select this option to allow only partners of the company to view the assortment in the contract.
 - **Customers (Specific)** — Select this option to allow only specific customers to view the assortment in the contract.
 - **Partners (Specific)** — Select this option to allow only specific partners to view the assortment in the contract.
 - **Internal** — Select this option to allow only internal users to view the assortment in the contract.
9. Once the required fields are defined, click **Save** to save the changes.
10. Click **Close** to exit.

To define items for contract use:

1. Go to Modules → Logistics → Reports → Search → Items. Define the relevant criteria and click **Show** to find the item that you want to define for contract use.
2. Click the item code in the **Code** column to display the item card. Then, click **Edit**.

General

Code

WC01

Country

- World -

Description

White Coffee

Search code

WC01

Division

036

Exact Asia Development

Person

175745

Jo-Anna Goh Li Ping

Children

Warehouse

LO

Central logistics

Type

Standard

Active from

07-07-2015

Active to

- -

Status

Security level

Internal

10

3. Under the **General** section, select the contract type at **Type**. The types relevant to contracts are **Standard** or **Contract**.
4. Select the required check boxes under the **Attributes** section. The attributes relevant to contracts are **Sales**, **Service**, or **Policy**.

Attributes		
<input checked="" type="checkbox"/> Sales	<input type="checkbox"/> Part	<input type="checkbox"/> Explode
<input type="checkbox"/> Buy	<input type="checkbox"/> Divisible	<input type="checkbox"/> Batch
<input type="checkbox"/> Stock controlled	<input type="checkbox"/> Policy	<input type="checkbox"/> Text
<input type="checkbox"/> From stock	<input type="checkbox"/> Make	<input type="checkbox"/> Print on invoice
<input type="checkbox"/> Serial numbers	<input type="checkbox"/> No discount	<input type="checkbox"/> Service
<input type="checkbox"/> Billable	<input type="checkbox"/> Productive	

The following shows the possible definitions that can be applied to the different types of items:

Item type	Attributes	Type
Sales item — A sales item is an item which can be sold by the company. You can create a contract for this item when you need to.	Sales	Except contract
Service item (used for prolongation) — A service item is a service which can be added to a contract. You can define an item as a service item, for example, a guarantee or a maintenance contract. You can extend the contract for items of this type.	Sales	Contract
Policy item — A policy item is an item which contains information about the conditions and terms of the contract. This item can be linked separately to the contract to provide extra information.	Policy	Standard

5. Click **Save** to save the changes.
6. Click **Close** to exit.

7.1.2 Creating contracts

Now that the setup of items and assortments has been completed successfully, you can start entering a new contract for a customer. When doing so, you are allowed to link the items defined in the previous section to the new contract.

Creating a contract consists of creating a contract header first. The contract header contains the serviceable item that the customer has bought. As such, you will be granting service and support for this item. The contract lines provide detailed information about the serviced product. Contracts are always created from the account card. Contracts can only be created for accounts with type **Customer** and **Reseller**.

To create contracts, function right **28 — Maintain Contracts** is required. Users with the **F&A staff** role have this function right.

To create contract headers:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant criteria and click **Show** to find the account that you want to create a contract for.

Note:

You cannot create contracts for accounts with types **Not validated**, **Lead**, and **Suspect** and statuses **Blocked** and **Not validated**.

2. Click the account name in the **Account name** column to display the account card.
3. Click the **Contracts** section.
4. Click **New**.
5. On the **New: Contract** page, click the assortment code in the **Code** column. You will see the following page:

The screenshot shows the 'New: Contract' form with the title 'Contract: 2545229:60:001 - 3A'. At the top right, it says 'Created by Nur Fadhliah Rosli 26-11-2015 11:41'. Below the title are buttons for 'Close', 'Save', and 'Save + New'. The form is divided into three main sections: 'General', 'Status', and 'Additional information'.
General section: Includes fields for 'Account' (3A), 'Number' (2545229:60:001), 'Description' (3A), 'Assortment' (Alliance/MFG), 'Item' (LMFG0000), 'Currency' (MAD - Moroccan Dirham), and 'Project'.
Status section: Includes 'Division' (Exact Software Maroc SARL), 'Start date' (26-11-2015), 'Prolongation' (01-01-2016), 'Prolongation (Minimum)', 'Final date' (- -), 'Valid' (marked with a red X), and 'Document'.
Additional information section: Includes a 'current value' checkbox.
Indexation section: Includes a 'Use: Index' checkbox.

Note:

For accounts which contain existing contracts, click **Contracts**. The **Contracts: Results** page will be displayed. Click **New**, and then click the assortment code in the **Code** column. You will see the following page:

6. Under the **General** section, type a contract number and description at **Number** and **Description** respectively.
7. Type or select an item code at **Item**. The item specified refers to the item that is covered in the contract.
8. Under the **Status** section, type or select the respective dates at **Start date** and **Prolongation** respectively. The **Start date** field specifies the date when the contract starts. The **Prolongation** field specifies the date that the contract will be extended to. For example, if the start date is March 1, 2015 and the prolongation date is January 1, 2016, the customer will be invoiced for 10 months.
9. Under the **Additional information** section, select the **Use: Index** and **current value** check boxes if you want the system to apply the **Indexed current value** prolongation method for the prolongation process.

Note:

- All fields with the “!” icon are mandatory.
- The **Additional information** section is displayed only when you have defined one contract free field or more.
- The **Use: Index** check box under the **Additional information** section is visible only when **Current value** is selected at **Prolongation** under the **Settings** section on the **Contracts: Parameter** page (go to Modules → Customers → Setup → Contract → Parameters).

10. Click **Save** to save the details and return to the contract card, and then click **Close** to exit.

Adding contract line items to contracts

When creating a contract header, the item that is covered by the contract is specified there. These are the sales items, such as bicycles, software, and consultancy. After the contract header is saved, you can then add contract line items. Here, all items, such as components, add-on products, or services and support agreements, can be added. You can add contract line items immediately after creating the contract header or at a later stage. If you are doing so immediately, you can skip to step 2 in the following section.

To add contracts lines, function right **28 — Maintain Contracts** is required. Users with the **F&A staff** role have this function right.

To add new or additional contract line items:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant criteria and click **Show** to find the account that you have previously created the contract for. Click the account name under the **Account name** column to display the account card.

Note:

You cannot create contracts for accounts with types **Not validated**, **Lead**, and **Suspect** and statuses **Blocked** and **Not validated**.

2. Next, click **Contracts**. Select the contract that was just created by clicking the contract code in the **Contract** column. Next, click **Edit**.
3. Click **Single** or **Multiple** to add a single or multiple contract line items respectively. If you click **Single**, you will see the following page:

Contract: 950933:76:001 - TURES DE LOS ANDES LTDA. TURA ☆ ⓘ
 Created by Nur Fadhillah Rosli 26-11-2015 13:45

[Close](#) [Save](#) [Save + New](#)

General

Customer: TURES DE LOS ANDES LTDA. TURA
 Contract: Number 950933:76:001
 Description:

Item

Type: Sales
 Start date: 26-11-2015
 Date: Prolongation: 01-01-2016
 Final date: - -
 Item: ⓘ
 Quantity: 1
 Variant: ⓘ

Sales

Prices: Default ☒
 Price: 0.0000
 Currency: COP — COP


4. Under the **Item** section, type or select the relevant dates at **Start date** and **Date: Prolongation** respectively.
5. Type or select an item code at **Item**.
6. Type the quantity of items at **Quantity**.
7. Next, at **Variant**, type or select the variant for the item.

Note:

This field can only be filled in when the price type on the item card of the item involved is set to **Variant**.

8. Under the **Sales** section, if required, type the price of the contract at **Price**. This amount will overwrite the default price as listed on the item card.
9. Click **Save** to save the details and return to the contract card, and then click **Close** to exit.
10. On the contract card page, click **Validate** to ensure that the information entered is correct.

Note:

During validation, the item relations, dates, and other settings will be checked. For example, if the start date is after the prolongation date, the **Valid** field under the **Status** section will display .

11. Click **Edit** to further change the details, and then click **Close** to exit. The following page is a sample of a contract card after adding in a contract item:

Contract: 794842:2:001 - "Atro Florens"

[Close](#) [Edit](#)

Created by Joost Tigelaar 17-10-2000 15:29
Modified by Automated Process Exact Software 14-02-2007 03:29

General				Status			
Account	"Atro Florens"			Division	Exact Compact		
Number	794842:2:001			Start date	26-01-2000		
Description	"Atro Florens"			Prolongation	01-03-2008		
Assortment	Exact Compact voor Windows			Prolongation (Minimum)	01-03-2008		
Item	LFE0000 — License Exact Compact voor Windows			Final date			
Project				Valid	✓		
				Document	License voucher: "Atro Florens", 794842:2:001, Valid From 2000-01-26 to 2008-03-01		

Additional information		Indexation	
current value	<input type="checkbox"/>	Use: Index	<input checked="" type="checkbox"/>

[Contract details](#) [Invoice history](#)

Options

View: All By: Item relations Show: All Currency: EUR - Euro

Items						Price		Amount	Status
Quantity	Description	Variant	Start date	Date: Prolongation	Standard	Contract			
1	PFE2220 - Exact Compact Factuur		26-01-2000		1,425.00	1,425.00	1,425.00	Active	
1	SFE2220 - OHO Compact Factuur		26-01-2000	01-03-2008	242.73	242.73	242.73	Active	
Total: Sales: Items:						1	Total amount:	1,425.00	
Total: Service: Items:						1	Total amount:	242.73	

Policy		Start date	Date: Prolongation	Amount: Standard	Amount	Status	
Description							
R002 - Registration discount rule		26-01-2000	01-03-2001		0.00	0.00	Active
Total: Policy: Items:				1			

Note:

All fields with the “!” icon are mandatory.

7.1.3 Prolongation of contracts

The contract prolongation process allows you to periodically invoice customers based on the service and/or support agreements for the products or services that they have bought. Before the prolongation process can be used, a few settings are required. The first thing that needs to be done is to set up the contract parameters. Contract renewals can only be done for items of type **Service** that are linked to the contract. Items of type **Sales** will not be renewed.

Setting up contract parameters

After creating the contracts, it is now time to define the contract parameters. These parameters are used for several goals, such as prolongation frequency, period, price index, and more. The contract parameters can be maintained per division. This allows you to have a prolongation frequency of one year for one division and one month for another division.

If the parameters are defined, it will affect all contracts created for the accounts that are linked to that division. You can define more than one parameter per division.

The last contract parameters created are the ones that are leading for contracts created with a prolongation date that is more recent than the date stated at **Valid - From** of the contract parameters. Contracts with a prolongation date before the date stated at **Valid - From** of the last created contract parameters will be affected by the penultimate contract parameters.

To define contract parameters, function right **138 — Maintain Contract parameters** is required. Users with the **Controller** role have this function right.

To define contract parameters:

1. Go to Modules → Customers → Setup → Contract → Parameters and click **New**. You will see the following page:

Contracts: Parameter

☆ ?

Close

Save

Save + New

General

Division

Valid - From

Invoices

Invoice

Currency

Your ref.

Description

Selection code

Cost center

Person

Settings

Prolongation

Frequency

Period

Price index

Document - Type

Use: Index

- Under the **General** section, define the relevant division at **Division**.
- At **Valid - From**, type or select a date to determine when the parameter is used.
- Define the number of invoices to be created as well as the currency to be used at **Invoices** and **Currency** respectively.
- Under the **Settings** section, define the prolongation settings, such as frequency and price index at **Frequency** and **Price index** respectively.
- Select the file format, either **CSV** or **XML**, at **Document - Type** to export the details of all the contracts that are prolonged into that format.
- Click **Save** to save the details, and then click **Close** to exit.

Note:

All fields with the "!" icon are mandatory.

Setting up document structure and other general settings

When exporting the list of contracts to be extended, a task is created in the workflow of the user who initiates the prolongation run. Also, a document is created. Before this can be executed, some settings need to be defined. First of all, you have to specify where the document will be stored.

To modify the settings of process types, function right **143 — Maintain Process Types** is required. Users with the **Controller** role have this function right.

To modify settings and adjust processes:

1. Go to Modules → System → Setup → Settings – General → Processes. Select the contract validation process by clicking the process type ID in the **Type** column. You will see the following page:

System: Process type

General

Type Validation

Description

Priority

Document

Document

Document type

Security level

2. Under the **Document** section, select the relevant document type in order to create the task.
3. Type the security level of the task at **Security level**. The default request type **0 - Task** will be used to generate the task.
4. Click **Save** to save the details, and then click **Close** to exit.

Note:

A modification in the default request type **0 - Task** can result in an error message when the prolongation process runs. Therefore, it is preferable not to modify this request type. The settings of the document type should also be checked under the **Synergy links** tab at Modules → Documents → Setup → Maintenance → Document: Types to see if any of the **Use** field is set to **Yes (Mandatory)**. An error may occur during the prolongation process if any of the field is set to **Yes (Mandatory)**. This is because the process is unable to gather the required mandatory information needed to create a document.

Processing the contract prolongation

After defining all the settings needed for prolongation, it is now time to execute the process. As mentioned before, the prolongation process is triggered by the background process **Exact.Jobs.ConProcess.dll** and needs to be scheduled or initiated manually.

To run the contract prolongation process, function right **84 — Allows to run contract prolongation** is required. Users with the **Controller** role have this function right.

To execute the contract prolongation:

1. Go to Modules → Customers → Setup → Contract → Processes. Click **Prolongation**. You will see the following page:

2. Type or select the division code at **Division**.
3. Type or select the start date and end date at **Start date** and **End date** respectively to select the relevant contracts for prolongation.
4. Select **Preview** at **Mode** to preview the results of the process, or **Export** to export the results immediately.
5. Click **Save** to save the details, and then click **Close** to exit.

Note:

- All fields with the "!" icon are mandatory.
- When the background process **Exact.Jobs.ConProcess.dll** is initiated, the prolongation will be executed for the selected contract range. You can check that the process has been executed successfully by going to Modules → Customers → Setup → Contract → Processes and clicking **Show**. If successful, the status **Processed** will be displayed in the **Status** column.

When the process is successful, there will be a task in the workflow with an XML or CSV file attached.

Invoicing accounts using Exact Globe Next

The last step in the prolongation process is invoicing. Invoicing can be done manually or, when using an Exact back-office product (in this example Exact Globe Next), automatically with the use of the XML file attached to the created task after prolongation. You can save the XML file to your local hard disk and upload it to Exact Globe Next. The invoice can then be created in the back office and sent to the customer.

7.2 CUSTOMER PORTALS

Another way of keeping your customers involved with your company and to improve your services to them is by allowing them to log on to a customer portal. In the customer portal, they can check the information your company has registered about them and if necessary, they can correct this information.

You can also give information via the customer portal, thus, removing the need to send newsletters frequently via mail. The communication you have with the customers can all be stored in Exact Synergy Enterprise and made available via a customer portal so that the customers can check it as well.

Furthermore, you can create a knowledge base for the customers where they can find information about your products. Access to your service and support team can also be made available via a customer portal.

Business benefits:

- Lets customers check their contact information themselves and correct it if necessary, thus, giving you up-to-date information.
- Makes a knowledge base available, which will remove some pressure on your service organization as customers can find the answers themselves.
- Makes all communication with your customers available so that they can check it themselves.

7.2.1 Setting up the default customer portal

In Exact Synergy Enterprise, there is a default customer portal available that you can use. To set up a default customer portal, function right **88 — Maintain HRM settings** is required. Users with the **HR** role have this function right.

To set up the default customer portal:

1. Go to Modules → HRM → Setup → General → Settings, and click **Edit**. You will see the following page:

2. Under the **Server** section, type the domain that you want to use for the customer accounts in your active directory at **Domain: New - Customer (Pre-Win2000)**. Select the corresponding directory if you have selected the **use Active Directory** check box. Select the relevant request type that will be used for communicating the logon details to the account manager at **Request: Portal access**.
3. Click **Save** to save the details, and then click **Close** to exit.

Accessing the customer portal

Now that the settings are set up, you can give portal access to your customers. Access to the portal is given for every contact person. This means every contact person can get his or her own login details for your customer portal.

It is advisable to give portal access to the main contact person only. The main contact person will then decide which other contact persons within the company that also need portal access. The main contact person can then assign access to these contact persons.

To assign a contact person the rights to access the customer portal, function right **121 — Allows to give web access to main contact person of reseller** is required. Users with the **Customer manager** and **Reseller manager** roles have this function right. You can also assign a contact person the rights to access the customer portal if you are the manager of the account.

To give the main contact person access to the portal:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant criteria and click **Show** to find the account that you have previously created the contract for. Click the account name in the **Account name** column to display the account card.
2. Click the main contact person under the **Contacts** section, and then click **Edit**. The following page is a sample of a contact card in the edit mode:

Contact: Mohamed Faraj Benwahoud

Close Save Delete Inactive vCard

Prospect 3A
Status: Active Rating: 7
Created by Abdellatif Chafik 13-07-2001 13:49
Modified by Karima Naouiani 12-12-2002 18:56

Contacts

Title MR Mr.
Initials
First name Mohamed Faraj
Middle name
Last name Benwahoud
Suffix
Job description President Delegeue
Job title
Phone
Extension
Mobile
Fax
E-mail
Valid email address ☐
Email permission ☐
Financial contact person ☐
Language
Main Yes

Remarks

Timestamp Full screen

Marketing

Account manager Abdellatif Chafik
Job title (Account manager) Sales Staff
Manager (Contact) 5013 Karima Naouiani
Job title (Contact: Manager) F&A Manager
Last: Login None

3. Select the check box at **Portal access** under the **Marketing** section.

Note:

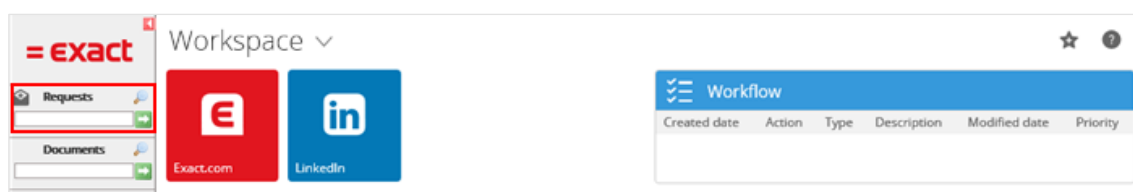
This is not available for accounts with types **Associate**, **Prospect**, **Division**, **Bank**, **Not validated**, **Lead**, and **Suspect** and statuses **Blocked**, **Inactive**, and **Not validated**.

4. Click **Save** to save the details, and then click **Close** to exit.

After saving the new setting, the contact person will be assigned a username. This is reflected at **Portal access** under the **Marketing** section of the contact card. After the portal access has been given, the background job **Exact. Process.exe** for the **Exact.Jobs.SysMaint.dll** process should be executed. For more information about setting up and running this job, you can refer to Exact Synergy Enterprise **Implementation Manual**.

After the job has been executed, a task will be created for the person who activated the portal access. This can either be the account manager or the main contact of the account. An e-mail containing the login details will also be sent to the person who was granted access to the portal. It is important to ensure that the information is up-to-date.

Now that the customer has received the login details, the customer portal can be accessed. When you want to keep it simple, the user can use the same secured web site as the one your employees use when they log on to Exact Synergy Enterprise. When the customer logs on to Exact Synergy Enterprise, the system will identify the username as a customer and the user will be directed to the default customer portal. The following is an example of the customer portal page:



A customer has security level **1 (Customers)** by default. So, when a customer logs on to the customer portal, he will only be able to see requests or documents that have security level **0 (All)** or **1**. The only exception is security level **3 Customer (Specific)**. When a request is created at this level and an account is linked to it, only members that are related to that account can see that request. It should also be noted that everyone in your organization is able to view all these requests with security level **0, 1, or 3**.

The users can also check their information as listed in the database and can update it if there are errors.

7.2.2 Setting up request types

One of the functionalities of the customer portal is to be able to create requests. For example, you can have a support request for questions about your products, a sales question request for questions related to the purchase of your products, or brochure request for requesting a brochure to be sent. Before customers are able to create these requests, these request types should be defined.

To edit requests, function right **232 — Edit all request types** is required. Users with the **Administrator** and **General manager** roles have this function right.

To define requests, function right **5 — Create request types, and edit request types without responsible** is required. Users with the **General manager** and **HR** roles have this function right.

To define requests:

1. Go to Modules → Workflow → Setup → Requests → Request types. Select the request that you want to allow customers to create. For example, the request **Task**. In the request definition, click the **Flow** tab.

Workflow: Request type - Task

Close Save Delete Copy

Created by Hung 29-08-2012 14:48
Modified by Hung 29-08-2012 14:49

General Fields **Flow** Actions Allocate Validation

Who can *create* a request?

Security level: Internal 10

Employees: For: Themselves

Role:

Role:

Role:

Next: Account(Type): Current (No changes)

Managers - For: Subordinates: Direct + Indirect

Level: Division

Level: Division

Level: Division

Next: Account(Status): Current (No changes)

Who can *edit* the newly created request?

Step action term: Create

Creator: ☒

Person: ☐

Role:

Step status term: Open

Approver: ☐

Everyone: ☐

Level / Division: Division Person

Who can *approve* the request?

Step action term: Approve

Person: Manager: Person

Role:

Approved: Inform - Creator: ☐

Assume: Ownership: No

Assign: Ownership: No

Next: Account(Type): Current (No changes)

Step status term: Approved

Purchase limit: ☐

Level / Division: Division Person

Rejected: Inform - Creator: ☐

Assign: Remark: No

Approve automatically if no approver defined: ☒

Next: Account(Status): Current (No changes)

Who can *realize* the request?

Step action term: Realize

Person:

Person:

Role:

Assume: Ownership: Current

Step status term: Realized

Level / Division: Division Person

Assign: Remark: No

2. Under the **Who can create a request?** section at **Security level**, select **Customers**. This will allow customers to be able to create this request type.

3. Next, click the **Fields** tab. You will see the following page:

Workflow: Request type - Task

Close Save Delete Copy

Created by Hung 29-08-2012 14:48
Modified by Jo-Anna Goh Li Ping 07-07-2015 15:50

General **Fields** Flow Actions Allocate Validation

Fields Add (Section) Add

#	Name	Label	Visible	Edit	Mandatory	Default/ Note		
1	Person		All	Open	Open, Approve, Realize, Process	Current	✗	∨
2	Description		All	Open	Open, Approve, Realize, Process		✗	∧ ∨
3	Security level		All	Open		10	✗	∧ ∨
4	Start date		All	Open	Open, Approve, Realize, Process	Current	✗	∧ ∨
5	End date		All	Open			✗	∧ ∨
6	Duration		All	Open			✗	∧ ∨
7	Remarks: Request		All	Open			✗	∧ ∨
8	Remarks: Workflow		Open, Approved, Realized, Processed, Rejected	Open, Approved, Realized			✗	∧ ∨
9	Attachments		All	Open			✗	∧ ∨
10	Account		All	Open			✗	∧ ∨
11	Contact		All	Open			✗	∧

4. Ensure that **Account** and **Contact** are present in the **Name** column. If they are not, click **Add** to add them.
5. Click **Save** to save the details, and then click **Close** to exit.

Note:

The **Account** and **Contact** fields need to be linked to the request type to be able to find the requests via the account card.

7.2.3 Personalizing the customer portal

You can choose to create your own customer portal so, that you can customize or add features to it. For example, you can give the customer portal the look and feel of your organization by using your own logo and color scheme. The principle is the same as creating your own public web site.

To create customized customer portals, function right **276 — Maintain websites, corporate level** is required. Users with the **Web administrator** role have this function right.

To create a customized customer portal:

1. Go to Modules → Documents → Setup → Maintenance → Web sites and click **New**.

The screenshot shows a 'Website' configuration form. It contains the following fields and controls:

- Website:** A text input field with a yellow warning icon to its right.
- Active:** A checkbox that is checked.
- Layout:** A dropdown menu showing 'A' with a magnifying glass icon to its right.
- Division:** A text input field with a magnifying glass icon to its right.
- Domain:** A large text area with a vertical scrollbar and a yellow warning icon to its right.
- Type:** A dropdown menu showing 'Standard'.
- Language:** A dropdown menu showing 'American English'.
- Meta keyword:** A large text area with a vertical scrollbar.
- Frame:** A dropdown menu.

2. Under the **Web site** section, define the web site title name at **Web site** and select **Customer portal** at **Type**.
3. You can also link a pre-designed HTML document available in Exact Synergy Enterprise to each of the sections of your web site. To link the HTML documents to the relevant sections, select **Document** at **Use** under the **Frame - Lefthand** and **Frame - Header** sections, and select **Document** at **Type** under the **Frame - Content** section. Then, select the documents at **Document** under the **Frame - Lefthand**, **Frame - Header**, and **Frame - Content** sections respectively.
4. Define the other relevant information.
5. Click **Save** to save the details.
6. Click **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

7.2.4 Functionality of Customer Portal

One of the functions of CRM is to continuously keep your customers informed of your latest developments, promotions, and news. This is useful because it keeps you fresh in the minds of your customers. When an opportunity arises at the customer's side, the probability that they will ask you to discuss this with them will be higher. Customers will more likely contact you if you are fresh in their minds.

Exact Synergy Enterprise allows you to create a customer portal. Some of the uses of the customer portal include:

- Continuous product promotion for your organization — The portal acts as a single place where your customers can go to obtain more information about your products and services. It also allows you to easily update the latest product information since it is in a single place.
- Informing customers of the latest organization happenings — The portal is able to provide information on the latest updates of your organization including new product launches, latest promotions, projects obtained, and sharing best practices with your customers by relating how some of your customers effectively used your products and services.
- Allowing your customers to interact with you — The portal can provide a communication avenue where customers can ask questions, give suggestions, voice complaints, and request for other services via the portal.

Among some of the functions that can be carried out in the customer portal are:

- allowing customers to search for documents,
- allowing customers to keep track of their requests,
- allowing customers to keep their data up-to-date, and
- providing additional information to customers.

7.3 OTHER SERVICE AND SUPPORT PROCESSES

7.3.1 Customer satisfaction

One of the purposes of your CRM strategy should be building a relationship with your customer that is beneficial to both sides. All the features and processes described in this manual are focused on reaching this goal. Now it is important to implement a method to determine whether your strategy is actually working.

One of the methods used to measure the results of your after-sales activities is to perform customer satisfaction surveys. With the results of a customer satisfaction survey, you can determine whether some parts of your after-sales activities need to be changed.

Business benefits:

- Quick and effective handling of complaints reduces customer dissatisfaction.
- Quick handling of questions improves customer satisfaction.
- Measuring customer satisfaction to gather information that can be used to improve your business processes.
- Getting an insight on whether your customers are satisfied with your products and services or how they feel about the company.

Setting up the function for customer satisfaction

To use the customer satisfaction functionality in Exact Synergy Enterprise, there are a few settings that need to be set up first. The following requirements must be met:

- Request type **135 - Customer Survey** must be available.
- Create two items and name them **Product Satisfaction** and **Service Satisfaction** to represent the type of customer satisfaction. They must have the **Serial numbers** check box selected under the **Attributes** section.
- Create separate serial numbers to indicate the different satisfaction levels for each type of customer satisfaction.
- The **Item 1**, **Serial number 1**, **Item 2**, and **Serial number 2** fields must be specified in the **Fields** tab of the previously created request type **135 - Customer Survey**.

This allows you to create a link to the request type **135 - Customer Survey** where customers can answer a survey where they can select the satisfaction levels (represented by the specified serial numbers) of the product or service (represented by the item).

To set up the customer satisfaction function by creating related items, function right **34 — Maintain World Items, except to change the division** or function right **347 — Maintain Country items** is required. Users with the **Item management** role have these function rights.

To set up the customer satisfaction function:

1. Go to Modules → Logistics → Entry → General → Items.
If you do not have the **Product satisfaction** and **Service satisfaction** items, do the following:
 - Under the **General** section, type a code and description at **Code** and **Description** for the item **Product satisfaction**. It is important that the description is spelt correctly as this will be used to link these items to the request.
 - Next, at **Assortment** under the **Categories** section, type or select the assortment for this item.
 - Under the **Attributes** section, select the **Serial numbers** check box.
 - Click **Save** to save the details and return to the item card.








Note:

Repeat the above four points to create the item **Service satisfaction**.



- On the item card, click **Serial numbers** under the **Attributes** section, and then click **New**. You will see the following page:

Items: Serial number

[Close](#)
[Save](#)
[Save + New](#)

Serial number		Free fields
Item	MAC0002 	Not defined
Number	M3862730	
Batch: Number	1	
Description	MAC001 - 20001	
Division	411 	
Country	NL 	
Blocked	<input type="checkbox"/>	
Start date	26-11-2015 	
End date	- - 	
Document		
Account		

Purchase

Purchase price	0.0000	EUR 
Supplier		

- Under the **Serial number** section, type a code at **Number**.
- Type a description at **Description** that corresponds with the code at **Number**. The description can be used to specify the different satisfaction levels.
- Click **Save + New** to continue creating serial numbers for each of the satisfaction level that you want. Click **Save** to save the details of the last satisfaction level that you want to create. The following page is a sample of a list of items and the respective details:

Items: Search - Serial number

[Close](#)
[Search](#)
[New](#)
[Day](#)
[Week](#)


Item **MAC0002 — Roode Pelikaan Carima**

Page size [Show](#)

Serial number ▲▼	Description	Item (Description) ^▼	Asset	Division
M3862730	MAC001 - 20001	Roode Pelikaan Carima		411 - 411
M3862732	MAC002 - 20003	Roode Pelikaan Carima		411 - 411

- Go to Modules → Workflow → Setup → Requests → Request types. If you do not have request type **135 - Customer Survey**, do the following:
 - Click **New**, and type in the ID and description.
 - Click the **Fields** tab and ensure that **Item 1**, **Serial number 1**, **Item 2**, and **Serial number 2** fields are listed. Other required fields are shown as follows:

Workflow: Request type - Customer Satisfaction Survey

Close Save Delete Copy

Created by Peter van Haasteren 02-07-2001 14:18
Modified by Jo-Anna Goh Li Ping 07-07-2015 16:02

General **Fields** Flow Actions Allocate Validation

Fields Add (Section) Add

#	Name	Label	Visible	Edit	Mandatory	Default/ Note		
1	Account		All	Open, Approved	Open, Approve, Realize, Process		✗	✓
2	Contact		All	Open, Approved, Realized, Processed			✗	✓
3	Person		Open, Approved, Realized, Processed, Rejected	Open, Approved, Realized, Processed	Open, Approve, Realize, Process	Current	✗	✓
4	Description		All		Open, Approve, Realize, Process	Customer Satisfaction Survey	✗	✓
5	Security level		Approved, Realized, Processed, Rejected	Approved		4	✗	✓
6	Project		Realized, Processed, Rejected	Realized, Processed	Open, Approve, Realize, Process	M06.NL.007.002.004	✗	✓
7	Start date	Call Back	New, Open, Approved, Rejected	Open, Approved		Current	✗	✓
8	Start time	Time	All	Open, Approved			✗	✓
9	Free: Amount 5	Belgoping	All	Open, Approved, Realized			✗	✓
10	Serial number 2	Service old scale:	All	Open			✗	✓
11	Serial number 1	Product old scale:	All	Open			✗	✓
12	Item 1		All	Open			✗	✓
13	Item 2		All	Open			✗	✓
14	Free: Yes/No 3	Non Response	All	Open, Approved, Realized, Processed		0	✗	✓

- Click **Save** to save the details, and then click **Close** to exit. The following page is an example of how this function will be used:

Customer survey - 00.001.361

Close Save Refresh Delete Copy Reject

Status: Open
Modified by gohj175745 07-07-2015 16:20

Create Approve

gohj175745
07-07-2015 16:19

Admin
Manager: Person

Person: gohj175745 — Stagiair — 411

Description: Customer survey

Security level: Internal 10

Start date: 07-07-2015

End date: - -

Hours: 0.00

Item: BON0001 R.P. Supremo beans

Item 2: BON0006 R.P. Cafe Creme beans

Serial number: 29130011 Roode Pelikaan Cioccolata

Serial number 2: 29130012 Roode Pelikaan Cioccolata

Remarks: Request

Timestamp Full screen

Note:

All fields with the “!” icon are mandatory.

Conducting customer satisfaction surveys

Now that the customer satisfaction functionality is available, you can start using the request type for storing the satisfaction ratings of your customers.

You can use the **Free: Text** and **Free: GUID** fields to insert more questions in the request type and thus, get more information from your customers via the customer satisfaction survey. With a free text field, you can create plain text fields or even drop down lists to allow your customers to provide more information. With GUID free fields, you can map a field to other entities, such as customer, people, and other requests. With pivot analysis, reports can be made for all available fields in the request. The default customer satisfaction report is purely based on the **Item 1** and **Item 2** fields in the request.

The results of the customer satisfaction survey can be retrieved. This is described in *Chapter 6.4.1 Customer portal statistics*.

7.3.2 Complaint management

Another important part of customer service and support is the way complaints are managed. Every organization that deals with customers will get complaints once in a while and it is the way they are dealt with that makes you stand out.

In Exact Synergy Enterprise, you can handle complaints by entering them as a type of request. The most effective way is to create a request type for this. The request type can be kept simple with only the **Account**, **Contact**, and the **Remarks: Request** fields required for entering the complaint itself. Other fields can also be used to enhance a complaint request, making more information available for reporting and management purposes. This is shown as follows:

The screenshot shows the 'Complaint - New' form interface. At the top, there are buttons for 'Close', 'Create', 'Edit', and 'Draft'. Below these, a 'Create' button is highlighted, and a 'Realise' button is next to it. The form is titled 'Complaint - New' and has a status of 'New'. The form includes several fields: 'Person' (with a value of '1' and a link to 'Dinn Brands — Accountmanager — Demo'), 'Description' (with a warning icon), 'Priority' (set to '3 - Medium'), 'Start date' (set to '17-11-2015'), 'End date' (set to '- -'), 'Days' (set to '0.00'), 'Project' (with a link), 'Item' (with a link), 'Account' (with a link and a warning icon), 'Contact' (with a link and a warning icon), 'Document' (with a link), 'Amount (Planned)' (set to 'EUR' and a link to 'Euro'), 'Security level' (set to 'Internal' and a value of '10'), 'Start time' (set to '00:00'), 'End time' (empty), and 'Your ref.' (empty). There is also a large text area for 'Question' at the bottom. At the very bottom, there are buttons for 'Timestamp' and 'Full screen'.

For this example, when there is a complaint, the support employee fills up the request accordingly and submits it. This will then be directed to his support manager who will try to resolve the issue. It is easy to keep track of the complaint since all communication is recorded in the request. Once the complaint is solved or is decided that it cannot be solved, the request can then be closed.

You can monitor complaints in various ways including viewing complaints for a specific account or keeping track of the latest complaints created. This is described in the following sections.

To view complaint requests for an account, no function right is required.

To view complaint requests for specific accounts:

1. Go to Modules → Customers → Reports → Accounts → Search. Define the relevant criteria and click **Show** to find the required account. Click the account name in the **Account name** column to display the account card.
2. Click **Workflow**. You will see the following page:

Workflow

Close Refresh Reset New

Criteria

Account: 3990000059250 Belastingdienst Involvement: Account

Show: ☒ List ☐ Summary Category: Type: Item:

Status: Sort by: Created (-)

Count: 1 Page size: 15 Show

Created	Type	Description	Contact	Person	Item 1	Status
18-06-2005	Sales question/call	Follow-up contact	Hans Rouw	Ahsin Mukhtar		Realized

3. Under the **Criteria** section, select **Complaint** at **Type**, and then click **Refresh** to list only complaint requests.

To view the latest complaint requests created, no function right is required.

To view latest complaint requests created:

1. Go to Modules → Customers → Reports → Workflow → Accounts: Requests - Recent. You will see the following page:

Accounts: Requests - Recent

Close Show Reset

General

Report - Data: ☒ Last request ☐ No request

Account

Type: Status: Group: Classification: Division:

Request

Category: Type: Date: Created

2. Under the **Request** section, type or select **Complaint** at **Type**.
3. Click **Show** to view the latest complaints created, and then click **Close** to exit.

7.3.3 Support management

Exact Synergy Enterprise allows the customer support team of your organization to manage questions and problems faced by your customers. Customers can also use a web portal to conduct various actions of their own such as searching for information on their own, monitoring the statuses of requests that was created, and providing feedback or asking questions.

Apart from that, you can conduct analysis on the communication between customers and the support team. This helps to enhance the service levels of your organization. This is further described at *Chapter 7.4.3 Support statistics*.

Exact Synergy Enterprise assists the support department in providing efficient support services through the use of workflow and related reports. This can be achieved by the following:

- Allowing customers to create support requests — When customers are able to create support requests, the support department will be able to manage the process properly. Keeping track of these support requests provides the department with an insight into the question trends and will be able to anticipate problems and react to them.
- Allowing customers to search the knowledge database — Giving customers access to the information available helps them to have a sense of independence. At the same time, you can put extra information into the database so that your customers can utilize your products and services better. This helps to lift some burden off your support department while generating customer loyalty.
- Viewing customer-related information — Having complete and up-to-date information aids in providing an accurate analysis and the best support possible to customers. Looking at the workflows and questions asked, the support department may be able to determine the status of the account as well as the latest problem the customer is facing.

Allowing customers to create support requests

One of the ways to service your customers is to ensure that there is a communication channel available for them to ask questions. This will make your organization more approachable to your customers while making it more convenient for them to solve their issues.

One of the communication channels that you can create is to give users the ability to create support requests in Exact Synergy Enterprise. When creating a suitable support request type, it is advisable to include, as a minimum, the following fields:

- account field to specify which customer has an issue,
- assortment field to specify the type of product, and
- remarks field to enter information of the issue concerned.

Ideally, the support request should be placed in a web portal. When users have issues, they can log on to the web portal and send a request with details about their problem. The support request should also be able to provide escalation in the event the first line support is unable to resolve the issue.

To edit support requests, function right **232 — Edit all request types** is required. Users with the **Administrator** and **General manager** roles have this function right.

To define support requests, function right **5 — Create request types, and edit request types without responsible** is required. Users with the **General manager** and **HR** roles have this function right.

To make support requests available on web portals:

You can refer to *Chapter 7.2.2 Setting up request types* to set up a request type where customers can create support requests. In the **Flow** tab, define the security level of the request type as **1** at **Security level** so that customers are able to access it, or **0** if you want unregistered users to be able to create requests to ask questions if they are interested in your products and services.

The following is a sample of a support request with escalation options:

First line support - 00.001.362

Close Save Refresh Delete Copy Reject

Status: Open
Modified by gohj175745 07-07-2015 16:36

Create Approve

gohj175745
07-07-2015 16:35

Admin
Manager: Person

Person: gohj175745 — Stagiair — 411

Description: How to upgrade to Synergy latest version?

Security level: Internal 10

Start date: 07-07-2015

End date: - -

Hours: 0.00

Remarks: Request

Timestamp Full screen

Remarks: Workflow

The following is a sample of a web portal that lets users create support requests as indicated by the boxed sections:

= exact Workspace

Requests Documents

Exact.com LinkedIn

Workflow

Created date	Action	Type	Description	Modified date	Priority
--------------	--------	------	-------------	---------------	----------

Allowing customers to search knowledge base

One of the ways to cut down the burden of your support team is to allow customers to search for answers to problems on their own. This is especially useful if you have a large amount of information in your knowledge base. Customers are encouraged to search for answers in the knowledge database. They should send a support request only if they cannot find a solution in the knowledge base. This is because it is possible that the issue being faced by a customer may have been solved before.

Alternatively, you can also choose to create a list of documents that links to frequently asked questions.

There are three ways to allow customers access to information in your knowledge base. These include:

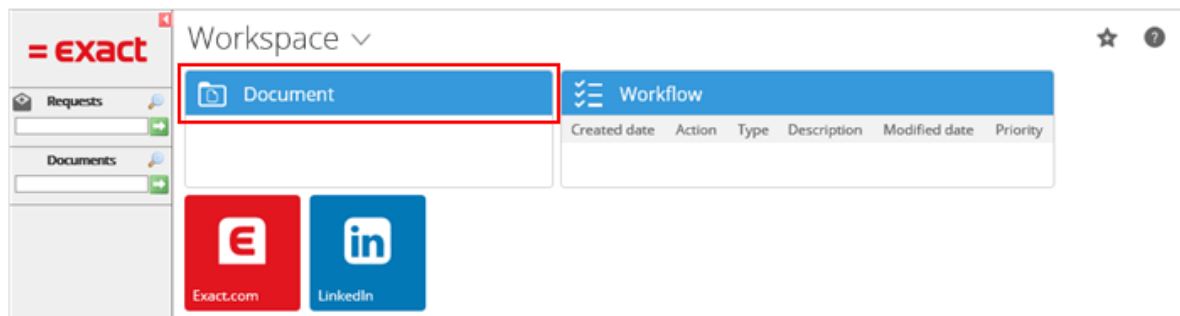
- making a search box available,
- creating a list of all related documents, and
- creating a list of frequently asked questions (FAQ).

One of the ways to display a list of related documents in a web portal is to create a document list. To create a document list, go to Modules → Documents → Setup → Layouts → List. Click **New** to create a document list. Type a code for the document list at **Code**. This is mandatory. Next, click **Advanced**. Type a criteria statement under the **Criteria** section to configure the document list. The suggested criteria to enter under the **Criteria** section on the **Layout: List** page is **bd.Type = '29'** where “29” is document type **FAQ** for “Type”. When the document list is ready, you can then insert it into the web portal.

To insert a document list into a web portal, function right **276 — Maintain websites, corporate level** is required. Users with the **Web administrator** role have this function right.

To include document lists in web portals:

1. Go to Modules → Documents → Setup → Maintenance → Web sites. Edit a portal as required.
2. Create a link to the document list to be inserted into the portal. An example of the link is **DocLayoutListView.aspx?SCAAction=15&ID=FAQ** where “FAQ” in “LayoutID=FAQ” should be replaced by the layout list name that you created at Modules → Documents → Setup → Layouts → List.
3. Click **Save** to save the details, and then click **Close** to exit. The following is a sample of a web portal with a link to a document list as indicated by the boxed section:



A list of documents will be displayed under the **Document** section.

Viewing customer-related information

When servicing customers, it is essential that the support team has the most updated and relevant information available at their fingertips. Having more information can help them to understand the issue better and easier.

Examples of useful customer information include:

- contract information,
- products or services purchased, and
- request information.

To view customer-related information, no function right is required.


To view customer-related information:

In Exact Synergy Enterprise, all customer-related information is available on the account card. To view an account card, go to Modules → Customers → Reports → Accounts → Search, define the relevant criteria, and then click **Show**. Click the account name in the **Account name** column to view the account card of that account. The following displays a sample of an account card:

Accounts: Customer

Close Edit Mail merge Customer rates

Created by 01-12-2010 10:39
Modified by Dinn Brands 02-10-2015 15:49

 **Cafe Hout - 60093**

Address Americastraat 13 (4)
Postcode / City 6300 Valkenburg LB
Country / State Netherlands (NL) Limburg
Website
E-mail
Phone / Extension
Fax

Contracts Workflow Projects
Documents Transactions Sales invoice
Opportunities Quotations Reports
Service configuration Service contracts Service activities

Remarks - None

Requests

Status	Request ID	Date	Status	Type
✓	00.000.417	02-10-2015 14:14	Approved	Appointment
Creator: Dinn Brands Person: Dinn Brands				
?				
i				
✗	00.000.416	02-10-2015 14:14	Open	Checked task
Creator: Dinn Brands Person: Dinn Brands				

Contacts All Add

Mr. James Brouw - Sales manager brouw.kd@gmail.com
Mr. Joshua Cheng - --

External References Add

Type	Link
in	https://www.linkedin.com/pub/james-brouw/64/6b6/64b

Marketing

Type / Since	Customer	01-12-2010
Status / Since	Active	01-12-2010
Security level	10	
Source	Phone	
Sector	Unknown	
Classification / Rating	Café	7
Size	Unknown	

Relations

Manager
Cost centre
Reseller
Parent account
Subsidiaries (0)

Divisions Add

Code - Division	Main
60093 - 001 Demo	✓

From the account card, the support team can obtain information, such as contract information. This can be accessed by clicking **Contracts**. This will display all contracts that the customer has with your organization. With this information, the support personnel will be able to find out the latest information about the customer's contracts. This helps the support personnel to find out what the organization is supposed to support the customer on.

It is also useful to know what the customer has purchased from your organization. This can be known by clicking **Items** of the account card. This will show the support personnel which product or service the customer has issues on. This helps when the support team is trying to diagnose the problem and find the most compatible solution according to the relevant product or service.

The request sections on the account card can be used to analyze requests that are linked to the customer. The **Requests** section displays the latest requests created. This helps the support team to be aware of the latest issues faced by the customer. It also shows the status of the requests. The support team can then quickly focus on requests that are still open, thereby improving the time to respond to services required. The **Requests: Graph** section displays the total requests created for each month. This helps to determine whether there is a trend. For example, if there is an unusually high amount of support requests, maybe it can be suggested that the customer change the support level, schedule a training session, or send a consultant to resolve issues.

7.4 REPORTS

7.4.1 Customer portal statistics

When you have defined a customer portal, you also may want to check whether your customers are using the portal. In Exact Synergy Enterprise, there are a number of reports available that allow you to do this.

Viewing the account activity reports

The activity report allows you to check which accounts are logged on and which application (page) is being viewed. It also shows the time and date of the last action performed by the account.

To view the current account activity reports, no function right is required.

To view current account activity reports:

1. Go to Modules → Marketing → Reports → Web site → Activity - Current. You will see the following page:

System: Activity - Current

Close Show Reset

^ Criteria

User: Type Customers Minutes 10

Division

2. Define the relevant criteria to list the relevant activities and click **Show** to view the report, and then click **Close** to exit. The following is a sample of the report based on the defined criteria:

System: Activity - Current

Close Refresh Reset

^ Criteria

User: Type People Minutes 10

Division

Page size 15 Show

Person	Type	Division	Date + time	Application
Nur Fadhliah Rosli	Employee	Exact Holding N.V.	26-11-2015 17:41:52	SysCurrentActivity.aspx

Viewing changes made by customers

Since customers are allowed to update a part of their own data, you may want to monitor these changes. Exact Synergy Enterprise provides you with a report that will show not only changes made by customers, but also changes by your employees to important sections on an account card.

To view reports on changes made to account cards, no function right is required.

To view reports on changes made to account cards:

1. Go to Modules → Marketing → Reports → Web site → Activity - Portal. You will see the following page:

Website: Activity - Portal

Close Show Reset Count

Criteria

User (Type) ☒ Customers ☐ Partners ☐ People
 Component ☒ Account ☐ Address ☐ Contact

Date 25-11-2015 — 26-11-2015
 Division 000 Exact Holding N.V.

2. Define the relevant criteria to list the relevant activities and click **Show** to view the report, and then click **Close** to exit. The following is a sample of the report based on the defined criteria:

Website: Activity - Portal

Close Refresh Reset Count

Criteria

User (Type) ☒ Customers ☒ Partners ☒ People
 Component ☒ Account ☒ Address ☒ Contact

Date 07-07-2015 — 08-07-2015
 Division 411

Page size 15 Show

Person	User	Code	Account	Component	Type	Field	Value: Old	Value: New	Date + time
Admin	Employee	60105	Brasserie Pigalle	Contact	Karin Janszen	Portal access	0	1	07-07-2015 16:45:09
Admin	Employee	60105	Brasserie Pigalle	Contact	Karin Janszen			0	07-07-2015 16:45:09
Admin	Employee	60105	Brasserie Pigalle	Contact	Karin Janszen			0	07-07-2015 16:45:09
Admin	Employee	60105	Brasserie Pigalle	Contact	Karin Janszen			0	07-07-2015 16:45:09
Admin	Employee	60105	Brasserie Pigalle	Contact	Karin Janszen			0	07-07-2015 16:45:09
Admin	Employee	60105	Brasserie Pigalle	Contact	Karin Janszen			0	07-07-2015 16:45:09
Admin	Employee	60105	Brasserie Pigalle	Contact	Karin Janszen			0	07-07-2015 16:45:09
Admin	Employee	60105	Brasserie Pigalle	Contact	Karin Janszen			0	07-07-2015 16:45:09
Admin	Employee	60105	Brasserie Pigalle	Contact	Karin Janszen			0	07-07-2015 16:45:09
Admin	Employee	60105	Brasserie Pigalle	Contact	Karin Janszen	E-mail		test@aaa.bbb	07-07-2015 16:45:09
Admin	Employee	60134	aaaaa vvv	Account		Manager	1006	1	07-07-2015 16:26:52
Admin	Employee	60134	aaaaa vvv	Account		Name Manager	Sanne Klein - van Elburg	Admin	07-07-2015 16:26:52
Admin	Employee	60125	Aalbers Verpak B.V. dd	Account		Name	Aalbers Verpak B.V. ccc	Aalbers Verpak B.V. dd	07-07-2015 16:16:38

Viewing results of customer satisfaction surveys

After the customer satisfaction survey has been conducted, as described at *Chapter 7.3.1 Customer satisfaction*, the results should be analyzed to find out what are the responses of customers.

To view results of a customer satisfaction survey, no function right is required.

To view results of customer satisfaction surveys:

1. Go to Modules → Marketing → Reports → Customers → Customer satisfaction. You will see the following page:

Customers: Customer satisfaction

Close Show Reset

Filter

Date: <Range> - - - -

Account: Group

Account: Division

Account manager: Cost center group

Account

Account: Classification

Request: Project

Show: Field blank

Layout

Axis: Vertical Account

Left

Request type

Request: Status ☐ Open ☐ Approved ☐ Realised ☐ Processed ☐ Rejected ☐ Draft

Request: Field

Field: Value

Count

Right

Request type

Request: Status ☐ Open ☐ Approved ☐ Realised ☐ Processed ☐ Rejected ☐ Draft

Request: Field

Field: Value

Count

2. Define the relevant criteria. Select the relevant request type at **Request type** under the **Left** section. This is mandatory.
3. Click **Show** to display the results. The following is a sample of the report on customer satisfaction based on the defined criteria:

Customers: Customer satisfaction

Close Refresh Reset

Filter

Date: <Range> 01-09-2007 - 31-12-2007

Account: Group

Account: Division

Account manager: Cost center group

Account 180871 A2 Networks B.V.

Account: Classification

Request: Project

Show: Field blank

Layout

Left

Request type Customer Satisfaction Survey

Request: Status ☐ Open ☐ Approved ☐ Realised ☒ Processed ☐ Rejected ☐ Draft

Request: Field Account

Field: Value

Count Account

Right

Request type Survey Answers

Request: Status ☐ Open ☒ Approved ☐ Realised ☐ Processed ☐ Rejected ☐ Draft

Request: Field Account

Field: Value

Count Account

Results

Account	A2 Networks B.V.	Quantity
A2 Networks B.V.		1
Total		1

Legend: Left

A2 Networks B.V.

7.4.2 Contract reports

When you are creating and maintaining contracts in Exact Synergy Enterprise, there are a number of reports that can help you review the statistics.

Searching for contracts

Contracts are service agreements between your customer and you. In order to provide the best possible service to your customer, you should be able to locate information about the contract easily. You can also search contracts that are linked to a particular item so that you are able to review the statuses of all these contracts for that particular item.

To view results of the report, no function right is required.

To search for contracts:

1. Go to Modules → Customers → Reports → Contracts → Search. You will see the following page:

Contracts: Search

Close Show Reset Count Default

> Templates

Criteria

Contract: [text input] Assortment: [dropdown] Private [dropdown] Save

Status: [dropdown] Country: [text input] Item: [text input]

Division: [text input]

Date

Start date: [date picker] Final date: [date picker] Not specified

Prolongation: Date: [date picker] Not specified

Account

Account: [text input] Account Type: [dropdown]

Account Status: ☐ Active ☐ Blocked ☐ Inactive ☐ Not validated ☐ Passive ☐ Pilot ☐ Reference

Columns

Contract	Account	Description	Assortment	Contract: Status
----------	---------	-------------	------------	------------------

2. Define the relevant criteria, such as the item at **Item** under the **Criteria** section to display contracts that are linked to an item, the date at **Final date** under the **Date** section to display contracts ending on a specific date, or the account code at **Account** under the **Account** section to display contracts that are linked to that account. Click **Show** to display the results, and then click **Close** to exit.
3. On the search results page, click **Export** to export the search results to a Microsoft Excel file. The following page is a sample of a report on contracts based on the defined criteria:

Contracts: Results

Close Search Export

Contract: 4468:16:004

Page size: 15 Show

Contract	Account	Description	Assortment	Contract: Status
4468:16:004	WILLEME HENRI & Cie SPRL	4468	Excellent	Inactive
4468:16:004	WILLEME HENRI & Cie SPRL	4468	Excellent	Inactive

Note:

To be able to export the contract results, the **Exact.Jobs.SysHrMail.dll** process of the **Exact.Process.exe** background job needs to be scheduled and executed. For more information on background jobs, refer to the Exact Synergy Enterprise **Implementation Manual**.

Monitoring contracts

Sometimes, it is useful to view the overview status of contracts based on division. By grouping the status of contracts by division, you are able to find out how many contracts are active, invalid, new, or cancelled according to the division.

To view results of the report, no function right is required.

To monitor statuses of contracts:

1. Go to Modules → Customers → Reports → Contracts → Monitor. You will see the following page:

2. Under the **Criteria** section, type or select the relevant date range at **Date** to display an overview of contracts with a start date that is between the date ranges. Click **Show** to view the status of contracts, and then click **Close** to exit. The following page is a sample of a report on the statuses of contracts based on the date range selected:

Division	Active	Invalid	New	Cancelled
000 Exact Holding N.V.	89	3	0	0
001 Exact Software Nederland B.V.	15	4	0	0
002 Exact Automatisering B.V.	13	8	0	0
003 Exact Online B.V.	2768	2	0	0
005 Exact Retail B.V.	0	0	0	0
006 Exact Online Development B.V.	1	0	0	0
008 Exact Maatwerk B.V.	1	2	0	0
009 Exact Alliances B.V.	817	68	0	0
010 Exact Software UK Ltd.	372	33	0	0
011 Exact Belgium NV-SA	0	0	0	0
012 Exact Software Germany GmbH	601	20	0	0
013 Exact Training & Consultancy B.V.	3	1	0	0
014 Grote Beer Software B.V.	3095	724	0	0
015 Cubic S.A.	6	1	0	0
016 Cobul N.V.-S.A.	0	0	0	0

Viewing contract revenue

One of the most important reports when working with contract management is the report that shows the revenue you have obtained from these contracts.

To view results of the report, no function right is required.

To view revenue obtained from contracts:

1. Go to Modules → Customers → Reports → Contracts → Revenue. You will see the following page:

Contracts: Revenue ✕ 🖨 ★ ?

[Close](#) [Show](#) [Reset](#)

^ **Criteria**

Division	000	Exact Holding N.V.	Type	<input type="text"/>
Classification	<input type="text"/>		Account: Status	<input type="text"/>
Country	<input type="text"/>		Start date, From - To	-- -- -- --
Assortment	<input type="text"/>		Final date	-- -- -- -- <input type="checkbox"/> Not specified
Item	<input type="text"/>		Date: Prolongation	-- -- -- -- <input type="checkbox"/> Not specified

2. Define the relevant criteria and click **Show** to display the results, and then click **Close** to exit. The following page is a sample of the revenue report based on the defined criteria:

Contracts: Revenue ✕ 🖨 ★ ?

[Close](#) [Refresh](#) [Reset](#)

^ **Criteria**

Division	000	Exact Holding N.V.	Type	<input type="text"/>
Classification	<input type="text"/>		Account: Status	<input type="text"/>
Country	<input type="text"/>		Start date, From - To	-- -- -- --
Assortment	<input type="text"/>		Final date	-- -- -- -- <input type="checkbox"/> Not specified
Item	<input type="text"/>		Date: Prolongation	-- -- -- -- <input type="checkbox"/> Not specified

Page size [Show](#)

Account	Contract	Assortment	Item	Classification	Type	Account: Status	Contract: Status	Sales(EUR)	Service(EUR)
Access Security Advisors BV (XSA)	200837:0:001	Internal Products	XSA Non-stop Security Program	Small Enterprise	Supplier	Active	✓	0.00	0.00
Autobar Holland	217/6011	Internal Products	Rental contracts	Small Enterprise	Supplier	Active	✓	0.00	72.60
Autobar Holland	290	Internal Products	Rental contracts	Small Enterprise	Supplier	Active	✓	0.00	103.46
Cherrytree International Ltd	1000089:2:001	Exact Globe 2000	License Exact Globe 2000	Midden- en Kleinbedrijf	Lead	Inactive	✗	0.00	0.00
Dyscon Trading	288360:0:001	Custom Solutions	Custom Design and Development	To be classified	Customer	Active	✓	600.00	0.00
Dyscon Trading	288360:0:002	Custom Solutions	Custom Support	To be classified	Customer	Active	✓	0.00	0.00


7.4.3 Support statistics

The support team is able to monitor and analyze support issues experienced by customers. This allows them to find out various information, such as the average turnaround time in solving issues, the types of issues that customers frequently face, and if there are any outstanding issues that are not resolved yet. In analyzing the information, the support team can improve efficiency and improve customer service levels in the future.

Viewing outstanding requests

To view results of the report, no function right is required.

To view outstanding requests:

1. Go to Modules → Workflow → Reports → Requests → Search.
2. Under the **Request** section, type or select the support request ID at **Type**.
3. Under the **Workflow** section, select **Open** at **Status** to display all requests with the **Open** status.
4. Type or select the relevant account ID at **Account** under the **Account** section to view the outstanding statistics for a particular account, if required. If the **Account** field is unavailable, click  **Customize** at the title bar. Under the **Account** section, select the **Account** check box to add this field.
5. Define the other relevant criteria as required.
6. Click **Show** to display the results, and then click **Close** to exit. The following page is a sample of a report on outstanding requests:

Workflow: Search - Requests							
<div> Close Search Export Create letter Create email </div> <div> Type 262 — 2nd line Support Status Open </div> <div> Page size <input type="text" value="15"/> Show </div>							
Created	Creator	Description	Type	Person	Account	Item 1	Status
11-01-2011	Ricky Tan	what happen to the printer	2nd line Support	Ricky Tan	-		Open
06-05-2009	Janna Wang	test from janna	2nd line Support		-		Open
06-05-2009	Janna Wang	test from janna	2nd line Support		-		Open
18-09-2007	Danny Claassen	Aanvraag voor Conversie	2nd line Support		Nissan Carrier Europe B.V.	E-Account	Open
18-09-2007	Gert-Jan Tuin	kostenplaats activa wordt niet gewijzigd als niet wordt aangegeven dat de gebudgetteerde bedragen berekent worden.	2nd line Support		Motel Breukelen	E-Fixed Assets	Open
18-09-2007	Jeroen de Jong	EG2003: Hoe kan ik een creditfactuur ongedaan maken?	2nd line Support		Tweco IT B.V.	E-Sales Order	Open
18-09-2007	Benny Carels	Hoe kan ik aan de hand van een criteria van de omzet een mailing verzenden?	2nd line Support		Gé Simons Internationaal Transport B.V.	Exact Globe - Exact e-Synergy integration	Open
18-09-2007	Maarten van Oostendorp	POS portal gebruiker verdwenen na toevoeging eSy + ESS portals in licentie	2nd line Support		B.V. 't Lanthuys		Open

Viewing average turnaround time of requests

To view results of the report, no function right is required.

To view average turnaround time in resolving issues:


1. Go to Modules → Workflow → Reports → Requests → Statistics - List.
2. Define the available options to display the relevant statistics. For example, under the **Criteria** section, select **Items** and **Workflow + Days at Statistics** to display the items and the workflow that are linked to those items and their corresponding duration. You can also type or select a request type at **Request type** to list only the relevant support request type.
3. Click **Show** to display the analysis, and then click **Close** to exit. The following page is a sample of the report based on the defined criteria:

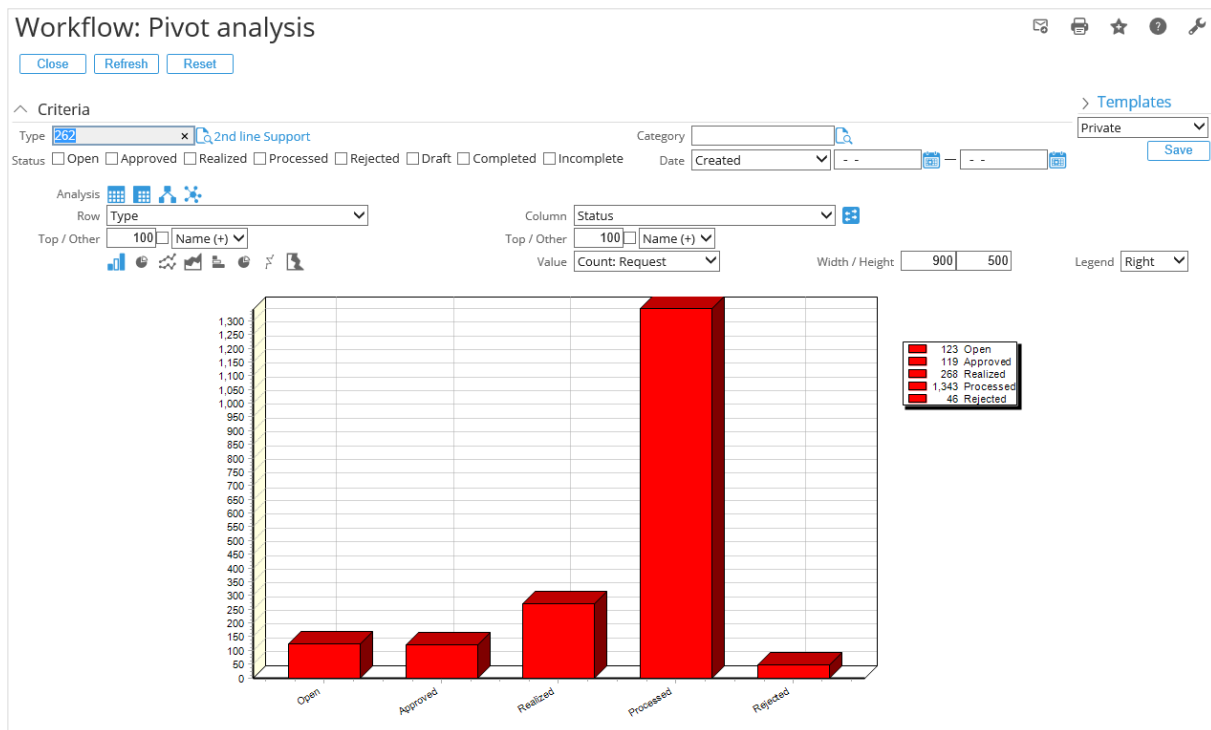
Workflow: Statistics - List						
<div> <div>Close</div> <div>Refresh</div> <div>Reset</div> </div>						
<div> <div>^ Criteria</div> <div> <div> <div>Statistics</div> <div>People</div> <div>Workflow + Days</div> </div> <div> <div>Private / Draft</div> <div><input checked="" type="checkbox"/></div> <div><input type="checkbox"/></div> </div> </div> <div> <div>Group</div> <div><input type="text"/></div> <div>Remark / Approved / Rejected</div> <div><input checked="" type="checkbox"/></div> </div> <div> <div>Category</div> <div><input type="text"/></div> <div>Division</div> <div>000</div> <div>Exact Holding N.V.</div> </div> <div> <div>Request type</div> <div><input type="text"/></div> <div>Cost center</div> <div><input type="text"/></div> </div> <div> <div>Page size</div> <div>15</div> <div>Show</div> </div> </div>						
People	Workflow	Days (Average)	Days (Maximum)	Type	Status	
1 Marleen Hoex	1	4,558.0	4,558.0	Contractor	Inactive	
2 Louis de Bievre	1	4,414.0	4,414.0	Contractor	Inactive	
3 Bill Grabe	1	4,911.0	4,911.0	Contractor	Inactive	
4 Fiona van den Bergh	1	4,848.0	4,848.0	Employee	Inactive	
5 Mailin Traas	1	5,278.0	5,278.0	Employee	Inactive	
6 Caroline van Gastel	1	4,666.0	4,666.0	Contractor	Inactive	
7 Stanley G Hartwig	1	5,520.0	5,520.0	Partner	Inactive	
8 Machiel Cremer	1	5,182.0	5,182.0	Employee	Inactive	
9 Henk Racké	1	5,007.0	5,007.0	Employee	Inactive	
10 Nabil Feki	1	5,168.0	5,168.0	Employee	Inactive	

Viewing most asked issues

To view results of the report, no function right is required.

To view issues that are most asked:

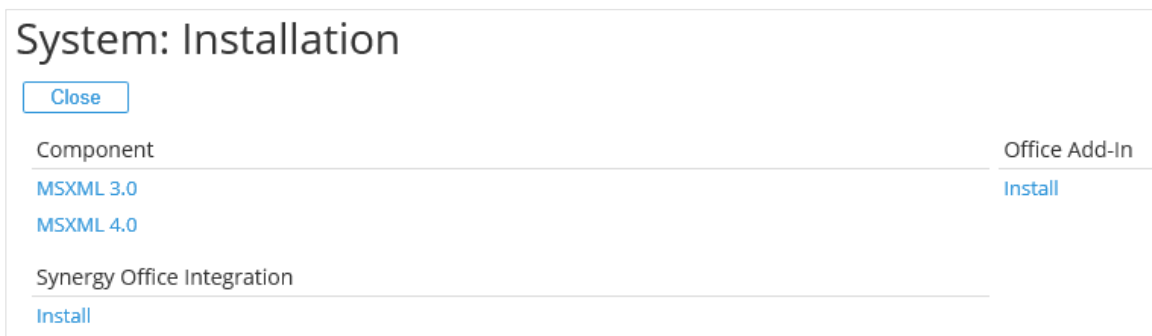
1. Go to Modules → Workflow → Reports → Requests → Pivot analysis.
2. Under the **Criteria** section, type or select the relevant support request type at **Type**.
3. Define the available options to show the preferred display method. For example, select  **Chart** at **Analysis**. Select **Item: 1** at **Row** to display the product. Select **Type of question** at **Columns** to display the types of questions asked. The results for this selection will display the product and the corresponding types of questions asked for each product line. From this analysis, you can find the types of questions that are more frequently asked. You can also track it to the product line that caused this.
4. Click **Show** to display the analysis, and then click **Close** to exit. The following page is a sample of the report based on the defined criteria:



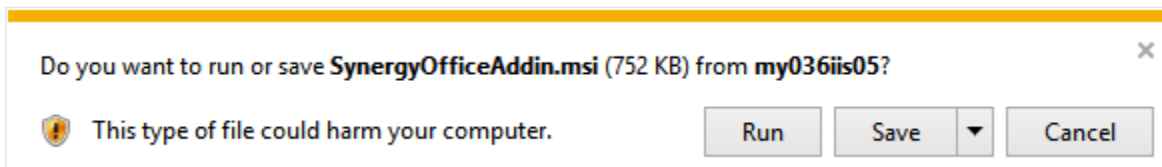
APPENDIX A: INSTALLATION OF MICROSOFT OFFICE ADD-IN

To install Microsoft Office Add-in:

1. Before you begin the installation, make sure all Microsoft Office applications are closed.
2. Start Microsoft Internet Explorer and log in to Exact Synergy Enterprise.
3. Go to Modules → System → Setup → Other → Installation: Microsoft office Add in. You will see the following page:



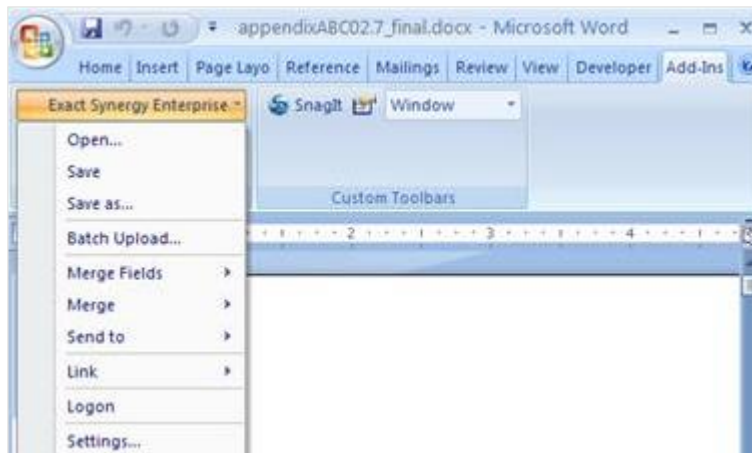
4. Click **Install** under the **Office Add-In** section.
5. Click **Download**. You will see the following:



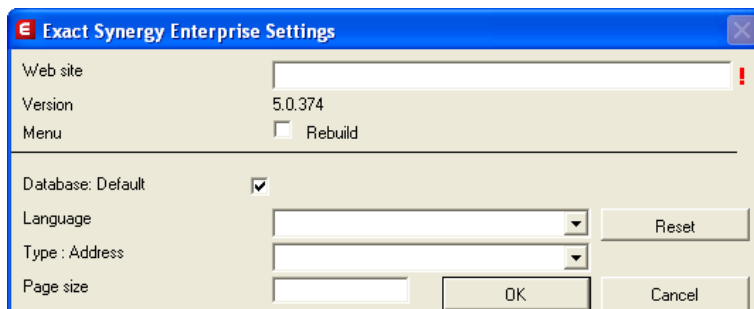
6. Click **Run** to start the installation process. The process will first detect if the user's computer has the required Microsoft components (the MSXML and MS ActiveX components). If the components are not found, they will be automatically installed. After that, the installation of **Office Add-in** will continue.
7. After the installation of **Office Add-in** is complete, the message "You must restart your computer before the new settings will take effect. Do you want to restart your computer now?" will be displayed.
8. Click **Yes** to restart your computer. If you click **No**, the **System: Installation** page will be displayed to inform you of the successful installation.
9. Click **Close** to exit. You can now see the **Office Add-in** function in Microsoft Office applications, such as Microsoft Excel, Microsoft Outlook, and Microsoft Word.

To set up the website for Microsoft Office Add-in:

1. At the **Microsoft Word** or **Microsoft Excel** menu, click **Add-Ins**, and then click **Exact Synergy Enterprise**. You will see the following page:



2. Select **Settings** to define the required settings to set up the website. You will see the following page:



3. At **Web site**, type the URL for the website where you want to upload your Microsoft Word documents.
4. Click **OK** to save the changes and exit.

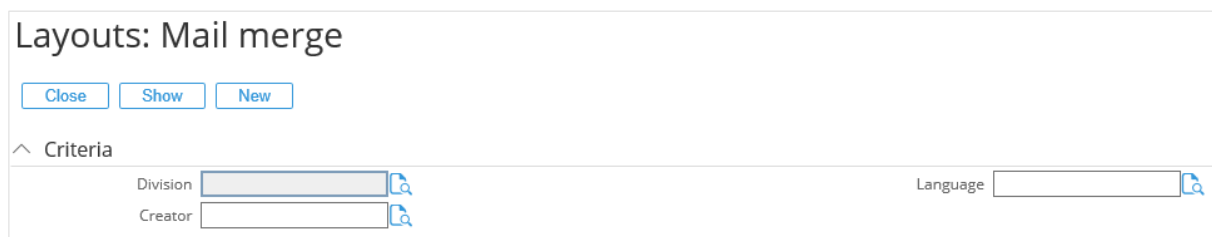
APPENDIX B: CREATING MAIL MERGE LAYOUTS

The **Word Merge** feature has replaced the mail merge functionality from product update 250 onwards. Hence, you will be able to use the **Word Merge** feature by default.

Existing users moving to product update 250 will still have the old mail merge functionality by default, and this can be switched to the new **Word Merge** functionality. For more information, see *Appendix F: Exact Word Merge*. When you have switched to the new **Word Merge** functionality, the following procedure is no longer necessary.

To create mail merge layouts:


1. Go to Modules → Documents → Setup → Layouts → Mail merge. You will see the following page:





Layouts: Mail merge

Close Show New

^ Criteria

Division 

Creator 

Language 



2. Define the relevant criteria, and then click **Show**. You will see the existing mail merge layout(s) divided over the various document categories as shown in the following page:


Note:

Mail merge layouts are document templates that are customized with information that will be reproduced when you create a document using the mail merge layout.

Layouts: Mail merge

Criteria

Division 
 Language 

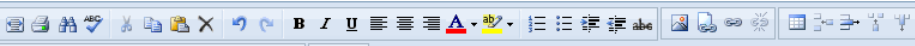
Creator 



Results

- ☐ Attachments & notes
 - ☐ Attachments (5)
- ☐ Customers
 - ☐ Complaints (26)
 - ☐ Consultancy (619)
 - ☐ Contracts (89)
 - ☐ DownLoads (9)
 - ☐ Invoices (10)
 - ☐ Maintenance (177)
 - ☐ Pilots (158)
 - ☐ Sales (1088)
 - ☐ Support (806)
- ☐ Developmen
 - ☐ Acceptance Tests (2)
 - ☐ Communication SIIGO (8)
 - ☐ Design (4)
 - ☐ Documentation (1)
 - ☐ General (83)
 - ☐ New Products (3)
 - ☐ Product Improvements (12)
- ☐ Discussions
 - ☐ Development (7)
 - ☐ Exact e-Synergy (105)
 - ☐ Exact Repository (31)
 - ☐ Informal (226)

3. Click **New** to create a mail merge layout. You will see the following page:



Layout: Mail merge





Paragraph Default Font Size  

☒ Normal ☐ HTML


Words:0 Characters:0


Subject 
 Division 


Type  Miscellaneous


Category  Marketing\Reference customer stories\1st product


Security level


Deletion date 

Person 

Account 

Contact 

Project 

Item 

4. Define the relevant criteria and the contents of your mail merge layout. If you want to get an overview of all available tags, click **Help**. You will see a description on the function of the mail merge layout, and examples on how to use the tags in the mail merge layout. There is a list of tags available and corresponding descriptions of the specific data that the tags make references to in the Exact Synergy Enterprise database. These tags are used to customize information within the document layout.
5. Click **Save** to save the defined criteria for the new mail merge layout. The following is a sample of a mail merge layout:

Layout: Mail merge 01.114.208

Close Edit Reply Copy

Created by Nelly Strang 05-02-2002 10:21
Modified by Nelly Strang 04-11-2002 09:01

> Information

Document 01.114.208 - Mailmerge Bevestiging van ontv
Subject Mailmerge Bevestiging van ontvangst Division
Publish Normal Transaction
Type *Complaints-General
Category Customers\Complaints\General
Security Internal - 10
Language Dutch

[BACO_CRM Company.Name1]

T.a.v. [BACO_CRM ContactPerson.Title.Abbreviation]
[BACO_CRM ContactPerson.Name]
[BACO_CRM Company.Address1]
[BACO_CRM Company.Postcode] [BACO_CRM
Company.City]

Delft, [BACO_CRM Current.Date.Short]

Onze referentie: [BACO_FRM NUMBER]
Klantnummer: [BACO_CRM Company.Code]
Bijlage: geen

[BACO_CRM ContactPerson.Title.Salutation] [BACO_CRM ContactPerson.Name],

Hierbij bevestigen wij het ontvangst van uw brief d.d. [BACO_CRM Current.Date.Short].
Wij zullen zo spoedig mogelijk contact met u opnemen.

Note:

All fields with the “!” icon are mandatory.

APPENDIX C: INSTALLATION OF SYNERGY OFFICE INTEGRATION

Synergy Office Integration (SOI) allows for closer integration between Exact Synergy Enterprise and Microsoft Office. With **SOI**, you will be able to access Exact Synergy Enterprise and all its related functions using Microsoft Outlook. In addition, you will be able to perform functions, such as saving and viewing documents, saving presentations, and spreadsheets directly and easily to Exact Synergy Enterprise.

Prerequisites

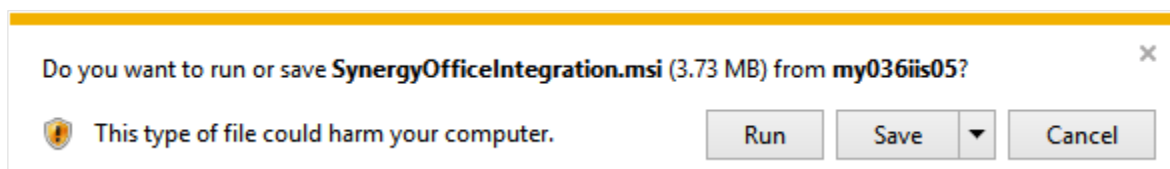
The following software must be installed before **SOI** can be installed:

- Windows Installer 3.1 or above. If you do not have this pre-installed, you can obtain it at <http://www.microsoft.com/downloads/en/details.aspx?FamilyID=889482FC-5F56-4A38-B838-DE776FD4138C&displaylang=en>.
- Microsoft .NET 4.0 Framework (Web installer). If you do not have this pre-installed, you can obtain it at <http://www.microsoft.com/download/en/details.aspx?id=17851>.
- Microsoft Visual Studio Tools for the Microsoft Office system (version 4.0 Runtime). If you do not have this pre-installed, you can obtain it at:
 - (x86 for 32-bit machine) — http://download.microsoft.com/download/F/3/9/F395E3C2-28A0-4F0D-9E20-FF4D1ADB08D8/vstor40_x86.exe.
 - (x86 for 64-bit machine) — http://download.microsoft.com/download/F/3/9/F395E3C2-28A0-4F0D-9E20-FF4D1ADB08D8/vstor40_x64.exe.
- Enable the **Binary**, **DocumentManagement**, **DocumentType**, and **Profile** web services at Modules → System → Setup → Web services → Settings.

Installing Synergy Office Integration

To install Synergy Office Integration:

1. Go to Modules → System → Setup → Settings – General → Preferences.
2. Click the **General** tab, and then click **Synergy Office Integration** under the **Office: Installations** section. Alternatively, you can also go to Modules → System → Setup → Other → Installation: Microsoft office Add in, or Modules → Customers → Setup → Other → Installation - Microsoft office Add in.
3. Click **Install** under the **Synergy Office Integration** section.
4. Click **Download**.



5. Click **Run**. You will see the following page:



6. Click **Next** and follow the instructions.
7. Once the installation is completed, click **Finish**.

Configuring Synergy Office Integration

After the installation, some configurations need to be done to ensure that no problems are encountered when you use **SOI** and save documents or e-mails to Exact Synergy Enterprise.

a) Default document type

The default document types need to be determined for the different usage within the different applications. To do this, go to Modules → System → Setup → Settings - General → Preferences, click the **Office Integration** tab, and then define the fields under the **Default document type MS Office** section.

b) SOI Configuration Wizard

When you open a Microsoft Office application for the first time after the **SOI** installation, a welcome page will be displayed, followed by the configuration wizard. You can opt to skip the configuration at that moment, but you will have to complete it before you can use the **SOI** features. The configuration wizard will be displayed again if you have clicked on any **SOI** feature.

To configure the Configuration Wizard:

1. Open Microsoft Word, Microsoft Excel, Microsoft Outlook, or Microsoft PowerPoint. You will see the following page:



2. Click **Next**. You will see the following page:

Synergy Office Integration Configuration Wizard

Fill in the information to connect to your Synergy environment



Web address

Example:

<https://deltabike.exact.com/docs/Portal.aspx>

Authentication Mode: Windows Authentication ▼

Username

Password

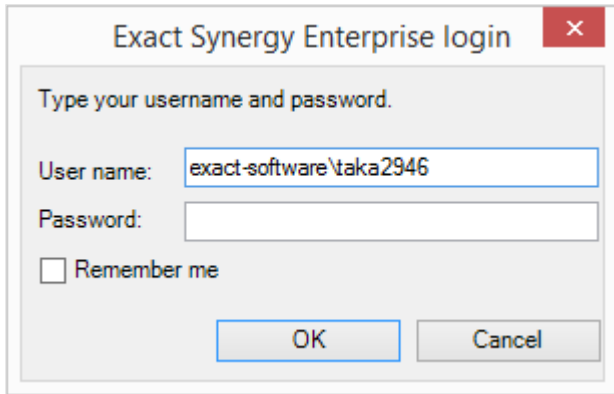
☐ Remember me

Later
Next

3. At **Web address**, type the website URL of the Exact Synergy Enterprise software to which you want to connect.
4. At **Authentication Mode**, select one of the following token-based authentication models: **Windows Authentication**, **Basic Authentication**, **WAAD Authentication**, or **Auth0 Authentication**.
5. At **Username** and **Password**, type your Exact Synergy Enterprise user name (for example: "domain\username") and login password.
6. Click **Next**. A check is done to see if your system fulfills all prerequisites needed for the configuration. If the system fulfills all prerequisites, the configuration process will proceed.
7. Once it is completed, click **Finish** to exit the configuration wizard.

Using Synergy Office Integration for the first time

When you access any **SOI** features in Microsoft Office applications under the **Synergy** ribbon or toolbar for the first time, a login page will be displayed for you to type your user name and password, as shown in the following:

A screenshot of a Windows-style login dialog box titled "Exact Synergy Enterprise login". The dialog has a red close button in the top right corner. Inside, it says "Type your username and password." Below this, there are two text input fields. The first is labeled "User name:" and contains the text "exact-software\taka2946". The second is labeled "Password:" and is empty. Below the password field is a checkbox labeled "Remember me", which is currently unchecked. At the bottom of the dialog are two buttons: "OK" and "Cancel".

Note: If you have selected the **Remember me** check box, you do not need to login again the next time you use **SOI** until the password expires.

Updating Synergy Office Integration

When you login to **SOI**, it will check with the version available in the server. If there is a newer version, an update will be offered.

If you proceed to update to the latest version, you will have to manually remove the existing version before the update is performed.

Once the existing version has been removed, you may proceed to **Step 5** of *To install Synergy Office Integration*.

APPENDIX D: CREATING MAIL MERGE DOCUMENTS WITH SYNERGY OFFICE INTEGRATION

The **Word Merge** feature has replaced the mail merge functionality from product update 250 onwards. Hence, you will be able to use the **Word Merge** feature by default.

Existing users moving to product update 250 will still have the old mail merge functionality by default, and this can be switched to the new **Word Merge** functionality. For more information, see *Appendix F: Exact Word Merge*. When you have switched to the new **Word Merge** functionality, the mail merge functionality from **Synergy Office Integration** will no longer be applicable in Microsoft Word.

A mail merge document is often a very useful and an efficient way of creating letters using contact details obtained from your database. It usually contains the same content meant to be sent to targeted recipients. The only differing point from one letter to the next is the information specific to the recipient, such as the recipient's name and address, company's name, and date.

The mail merge document will contain special tags that are used to insert data from the database to the document when it is generated. **Synergy Office Integration (SOI)** can be used to create a mail merge template using Microsoft Word. This document can then retrieve data from Exact Synergy Enterprise to create a mail merge.

To create a mail merge, the following steps need to be taken:

- Create mail merge templates
- Select the target recipients
- View the results of the mail merge
- Complete and process the mail merge

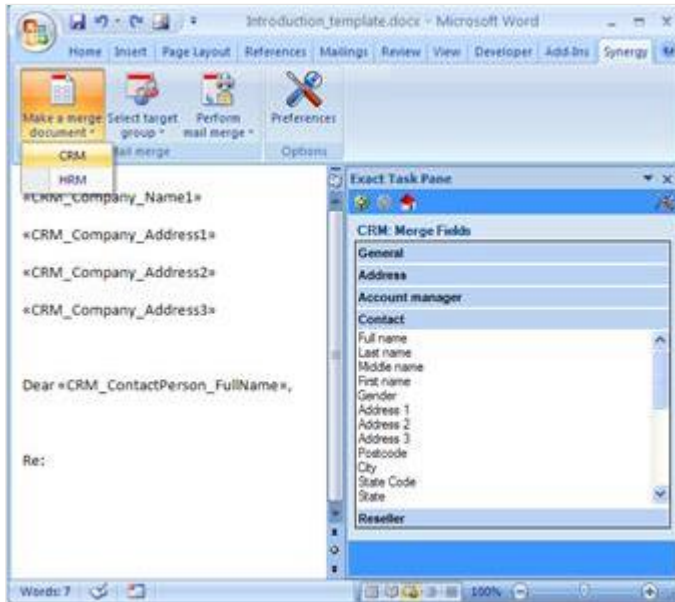
Note:

You are able to perform this function only if you have the **Professional** role.

Create mail merge templates using Synergy Office Integration

To create mail merge templates:

1. In Microsoft Word, click **Make a merge document** and select either **CRM** or **HRM** to load the corresponding tags in the **Task Pane**, as displayed in the following:



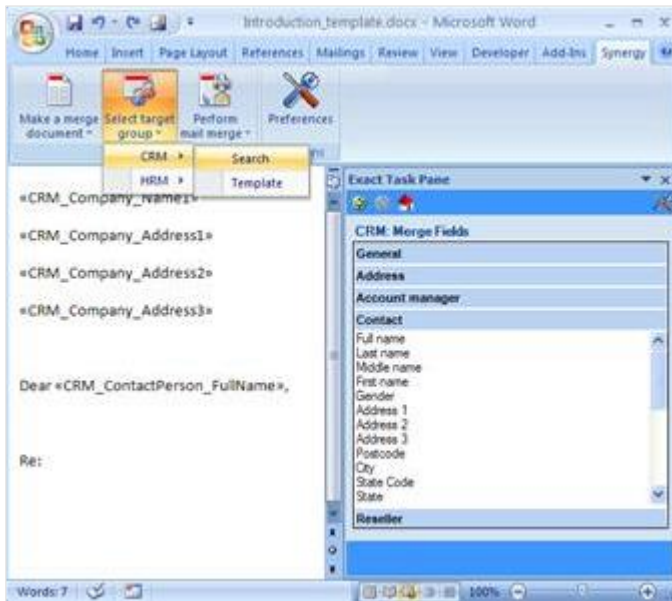
2. Click the required group in the **Task Pane** to expand it.
3. Click and drag the required tags from the **Task Pane** to the document to insert the tags into the document.
4. Save the template when you have finished composing the mail merge template.

Select target recipients using Synergy Office Integration

Once the template has been created, you can begin to merge your data into it. To do this, you have to select the relevant target recipients.

To select target recipients:

1. Open the mail merge template.
2. Click **Select target group** and select either **CRM** or **HRM** as the corresponding data source.
3. Next, select **Search** to search for the target group or **Template** to search using an available search template. The following page will be displayed:

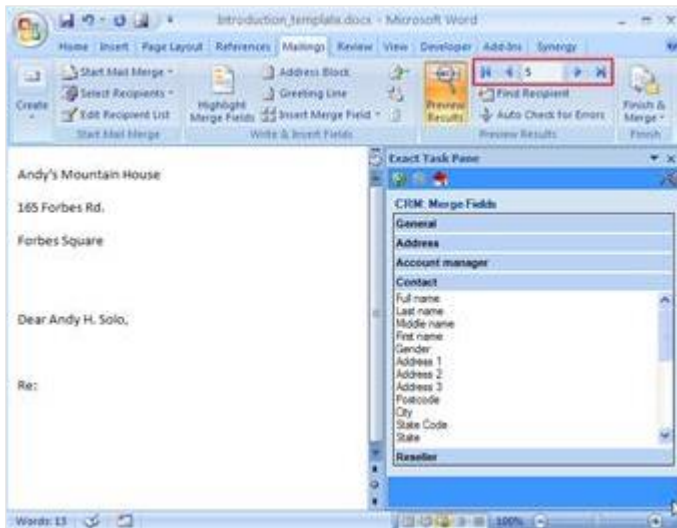


4. If you select **Search**, enter the relevant criteria in the pop-up window and click **Merge**. If you select **Template**, select the required search template in the pop-up window and click **Merge**.

View the results of the mail merge using Synergy Office Integration

To view results of your mail merge:

1. In Microsoft Word, select the **Mailing** ribbon.
2. Use the **Next Record** and **Previous Record** arrows to scroll through the results, as displayed in the following page:



Complete and process the mail merge using Synergy Office Integration

The mail merge is complete when it is processed. The options available to process a mail merge include creating a document with the merge results, sending the results to a printer, sending the results to recipients via e-mail, and saving the results to Exact Synergy Enterprise.

To complete the mail merge process:

1. In Microsoft Word, click **Perform mail merge** and select the relevant option, as displayed in the following page:



2. If you select **New MS Word Document**, **Send to printer**, or **Save to Exact Synergy Enterprise**, select the required record to process. If you select **Send email**, select the required record to process, and then select the e-mail address to send it to. Enter a subject for the e-mail, and then select whether to send the mail as an attachment.
3. Click **Merge** when you have specified all relevant options.

APPENDIX E: SETTING UP EXACTWEBGUEST

For customers and resellers who are using the **CRMQuestionnaire** application in the external Exact Synergy Enterprise web site, an ExactWebGuest user must be present in the database. The **CRMQuestionnaire** application is an enhanced contact form that creates a non-validated account and an attached request in the workflow of the account when a web guest leaves their name, address, and question. In order to log in to the customer and reseller portals respectively, a resource ID for the ExactWebGuest user has to be created in the database.

The user ID for the ExactWebGuest user is -2. Therefore, it cannot be seen in Exact Synergy Enterprise. To check whether this user exists in the database, you need to run a query using the SQL Server Management Studio. On the query page, run the following SQL statement:

```
Select* from humres where res_id=-2
```

When the user is not present in the humres table, you can create it manually using the SQL Server Management Studio. To create the ExactWebGuest user in the database, you need to run the following query:

```
Insert into humres (res_id, fullname, sur_name, usr_id, job_level,
blocked.land_iso,ldatindienst,repto_id,comp,emp_type,emp_
statd,emp_stat) values(-2,'ExactWebGuest','ExactWebGuest','ExactWebGuest',0,0,'NL',
getdate(),1,'001','E',getdate(),'A')
```

The ExactWebGuest user will take up one user license. So, you have to make sure that there are enough licenses for all your users before running the query.

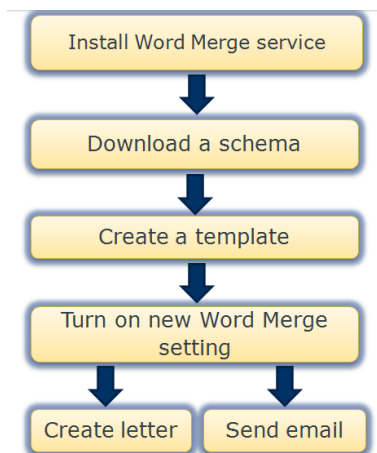
APPENDIX F: EXACT WORD MERGE

Exact **Word Merge** is part of Exact Synergy Enterprise and this is used to send a predefined e-mail or letter in a corporate style using templates based on roles and rights. Templates are documents created in Microsoft Word and uploaded to Exact Synergy Enterprise as templates. To create template documents, you will require a schema, which contains a set of merge tags which can be dragged into a template document. While performing the merge, these tags will be replaced by the actual values. You can create your own schemas and templates, and you can also define the templates and schemas that can be used by other users.

Note:

- Depending on the product update you are using, you may or may not use all of the features mentioned above.
- The new **Word Merge** functionality comes as a package in product update 250 which replaces the old mail merge functionality. For new customers, or when you are creating a database, the old mail merge functionality will no longer be available. No settings are required.
- Existing users moving to product update 250 will still have the old mail merge functionality by default, and this can be switched easily to the new **Word Merge** functionality.

How does Word Merge work?



Installing Exact Word Merge Integrator

Exact Word Merge Integrator makes use of Windows Services for the merging process. There is no background job needed for the process. The services are installed on the server, running, and waiting for any requests for **Word Merge**. Whenever a request for merging is initiated, the services will pick up the request and process it immediately.

Word Merge does not require Microsoft Office to be installed on the server.

Prerequisites

- Windows server operating system
- Exact Synergy Enterprise product update 250 onwards must be installed on the server
- Microsoft .Net Framework version 4.5 Full
- Microsoft Message Queue (MSMQ)
- A “Fixed User” to start the **Word Merge** Windows services. This user requires the right in the Windows server to start services and the user must exist in Exact Synergy Enterprise with the following function rights:
 - **620 — Entity Services Create: Documents**
 - **621 — Entity Services Read: Documents**
 - **622 — Entity Services Update: Documents**
 - **893 — Entity Services Create: Word Merge**
 - **894 — Entity Services Read: Word Merge**
 - **895 — Entity Services Update: Word Merge**
 - **896 — Entity Services Delete: Word Merge**

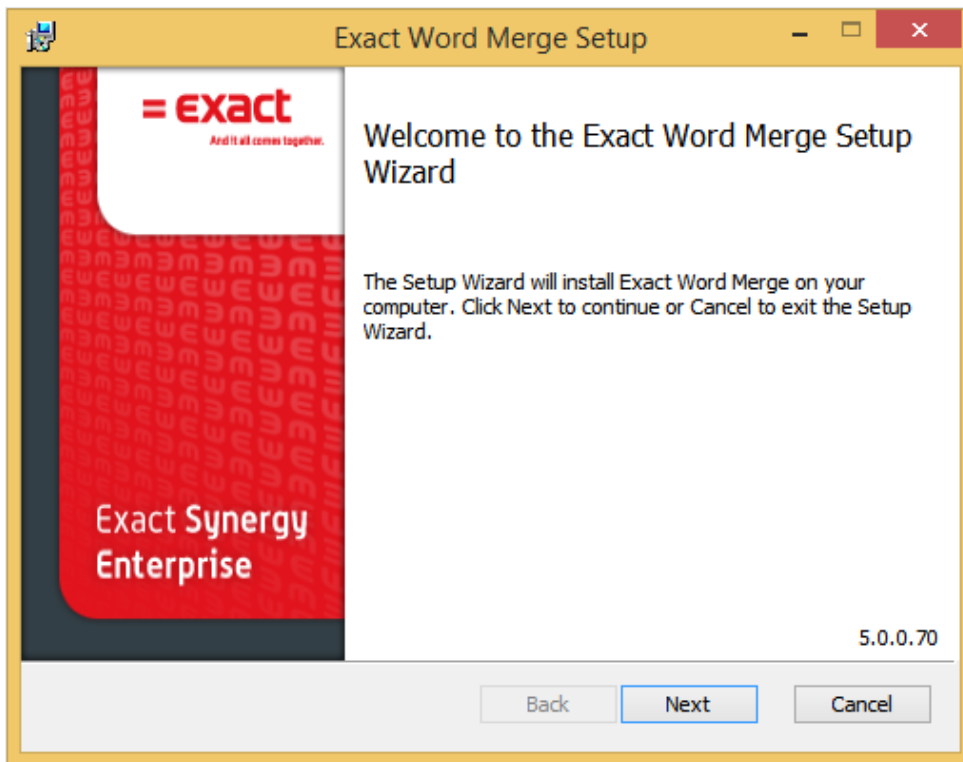
To install Exact Word Merge Integrator:

1. Run the development package **ExactWordMerge x86.msi** (for the 32-bit environment) or **ExactWordMerge x64.msi** (for the 64-bit environment) at the server side. This can be found in the **cab** folder of the Exact Synergy Enterprise installation folder.

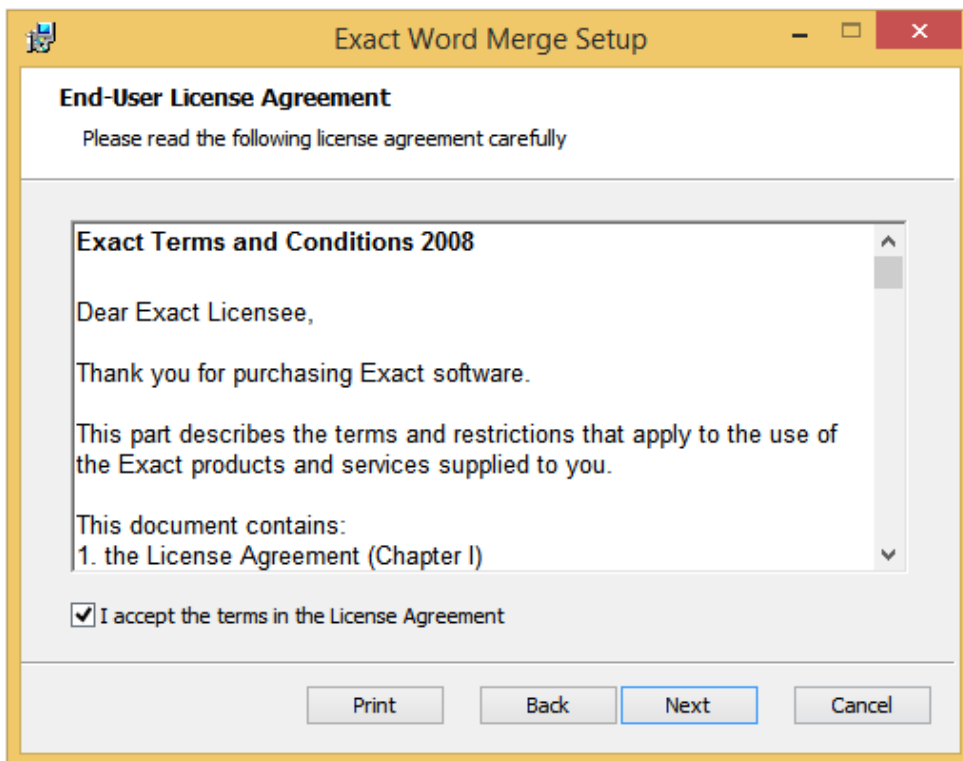
Note:

- If Exact Synergy Enterprise is installed in C:\Program Files (x86) on the 32-bit environment, then you need to install the 32-bit version of Exact Word Merge Integrator.
- If Exact Synergy Enterprise is installed in C:\Program Files on the 64-bit environment, you will need to install the 64-bit version. Otherwise, install the 32-bit version of Exact Word Merge Integrator.

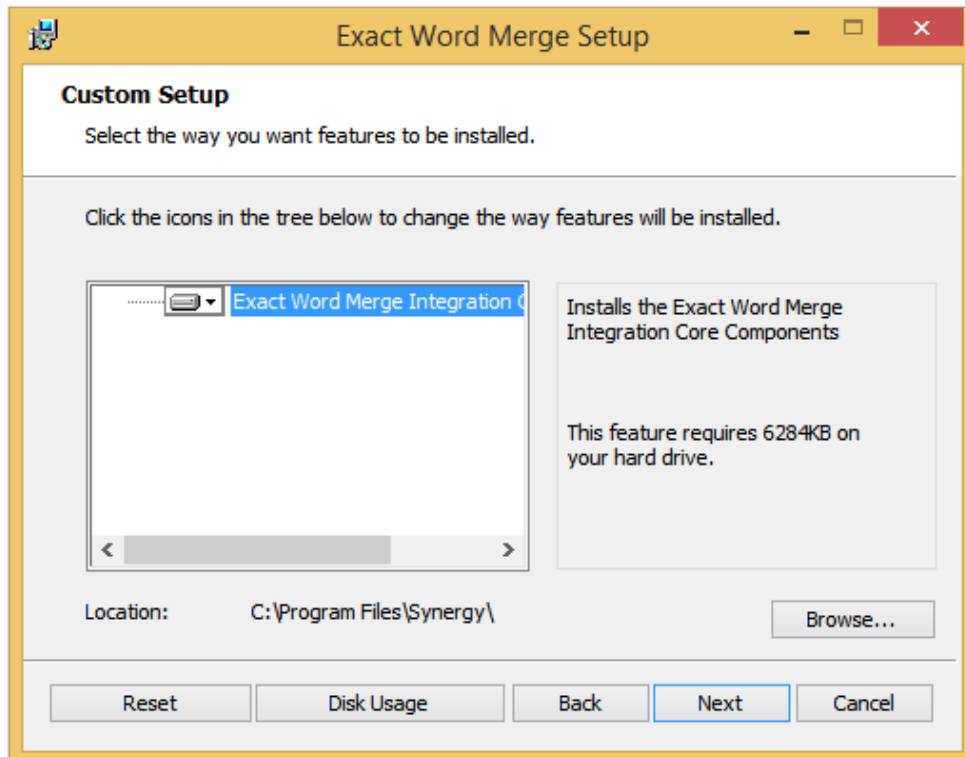
The following page will be displayed:



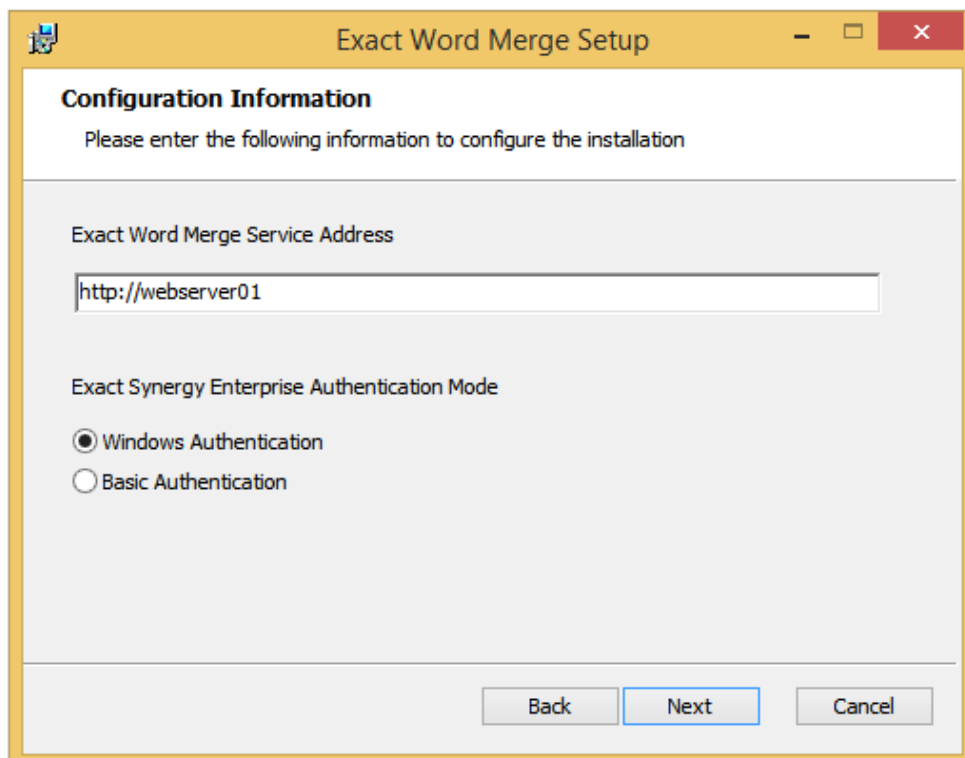
2. Click **Next** to start the installation.



3. Select the **I accept the terms in the License Agreement** check box, and then click **Next**.

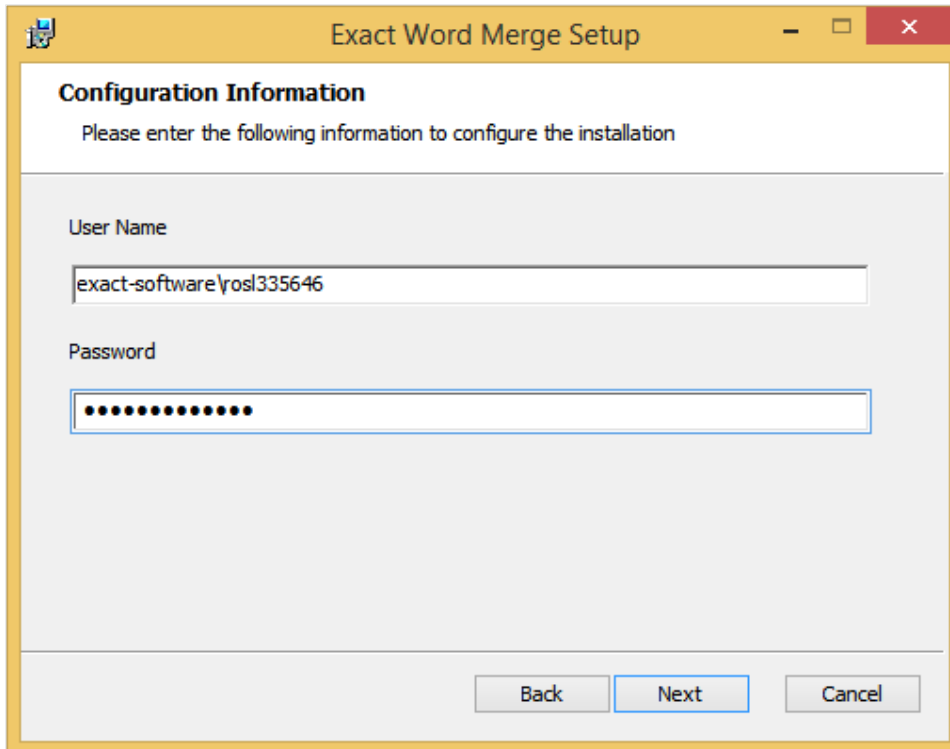


4. On the **Custom Setup** page, click **Exact Word Merge Integration Core Components**. This component is needed for the Exact Word Merge Integrator to work.
5. Click **Browse** to define the path for the Exact Synergy Enterprise installation folder, and then click **Next**.



6. On the **Configuration Information** page, at **Exact Word Merge Service Address**, type the path of the Exact Synergy Enterprise server, for example, `http://webserver01`.

7. At **Exact Synergy Enterprise Authentication Mode**, select the authentication mode that is used on the Exact Synergy Enterprise.
8. Then, click **Next**. The following page will be displayed:



The screenshot shows the 'Exact Word Merge Setup' window with the 'Configuration Information' tab selected. The window has a yellow title bar and a standard Windows window control bar. The main area is white with a light gray border. It contains two input fields: 'User Name' and 'Password'. The 'User Name' field contains the text 'exact-software\ros1335646'. The 'Password' field is filled with dots. At the bottom, there are three buttons: 'Back', 'Next', and 'Cancel'. The 'Next' button is highlighted with a blue border.

Exact Word Merge Setup

Configuration Information

Please enter the following information to configure the installation

User Name

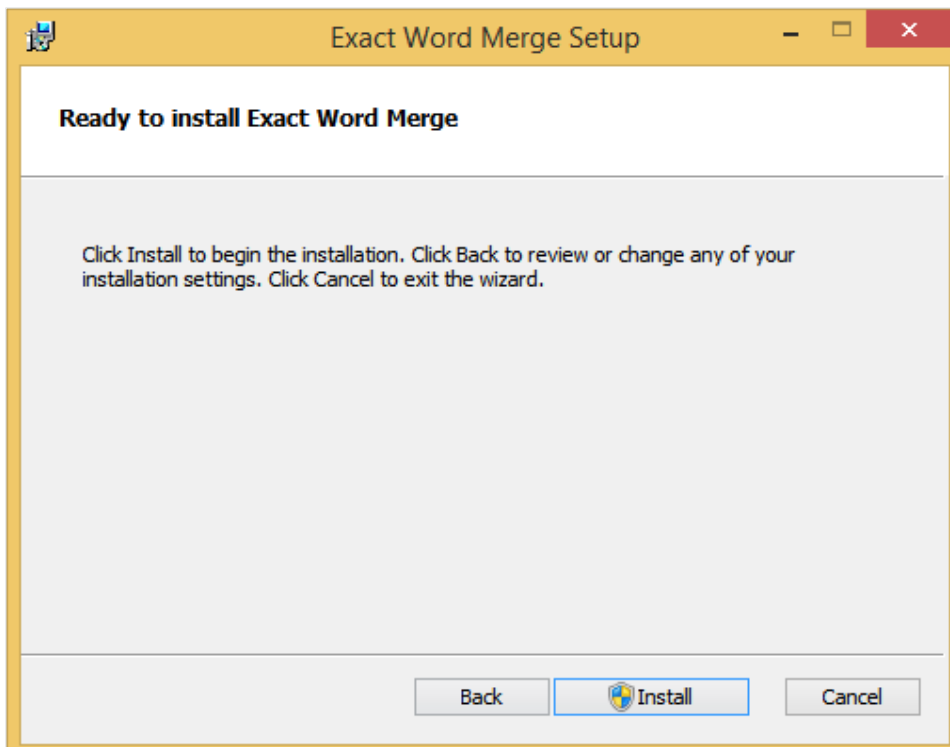
exact-software\ros1335646

Password

.....

Back Next Cancel

9. At **User Name**, define the user name in the format of **<domain>\<user name>** or **<machine name>\<user name>**. This is the user that will be used to start the **Word Merge** Windows services. This user must also exist in Exact Synergy Enterprise. For more information, see the **Prerequisites** section in this appendix.
10. At **Password**, type a password for the user and click **Next**.



The screenshot shows the 'Exact Word Merge Setup' window with the 'Ready to install Exact Word Merge' tab selected. The window has a yellow title bar and a standard Windows window control bar. The main area is white with a light gray border. It contains a paragraph of text: 'Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.' At the bottom, there are three buttons: 'Back', 'Install', and 'Cancel'. The 'Install' button is highlighted with a blue border and a shield icon.

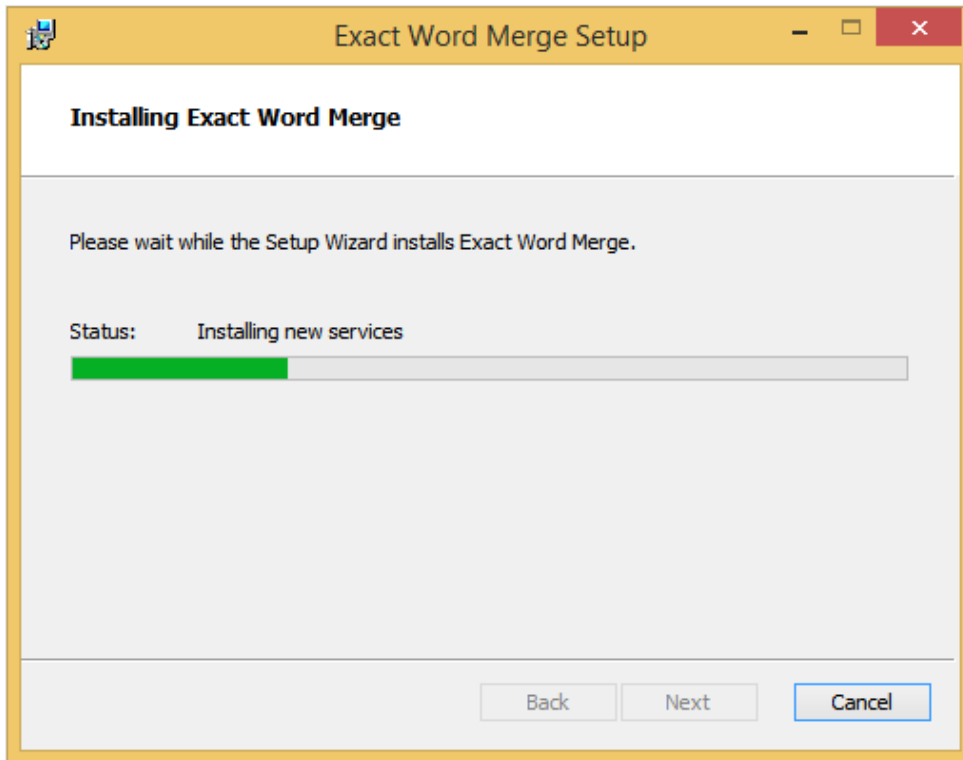
Exact Word Merge Setup

Ready to install Exact Word Merge

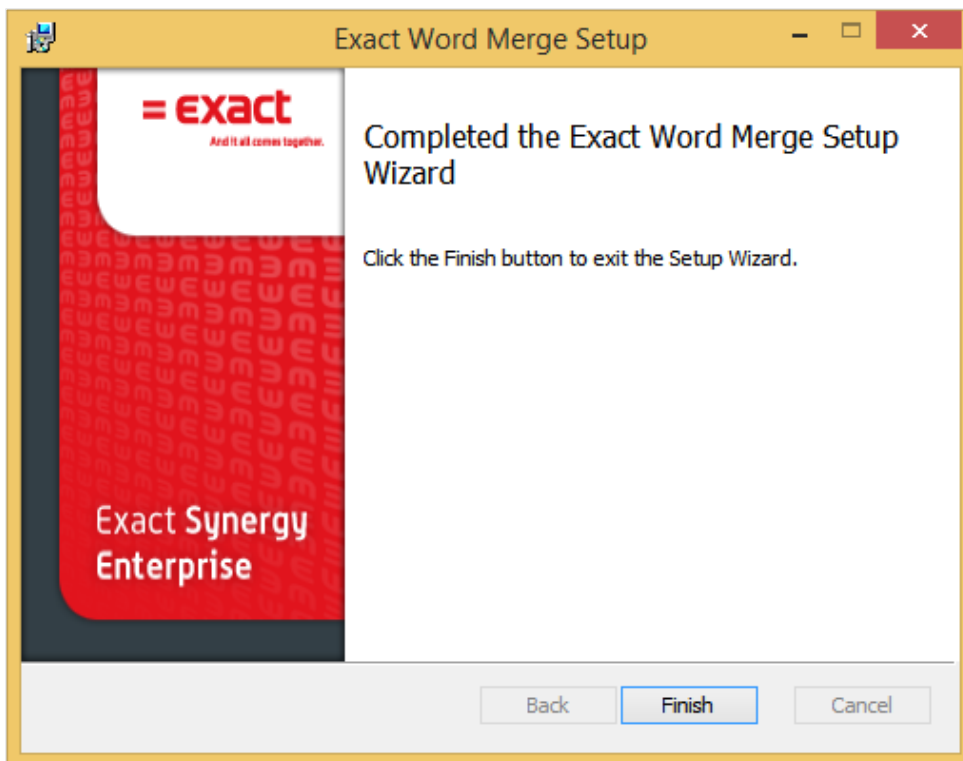
Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.

Back Install Cancel

11. Click **Install**. The following page with the installation in progress will be displayed:



12. Once installation is completed, click **Finish** to exit.

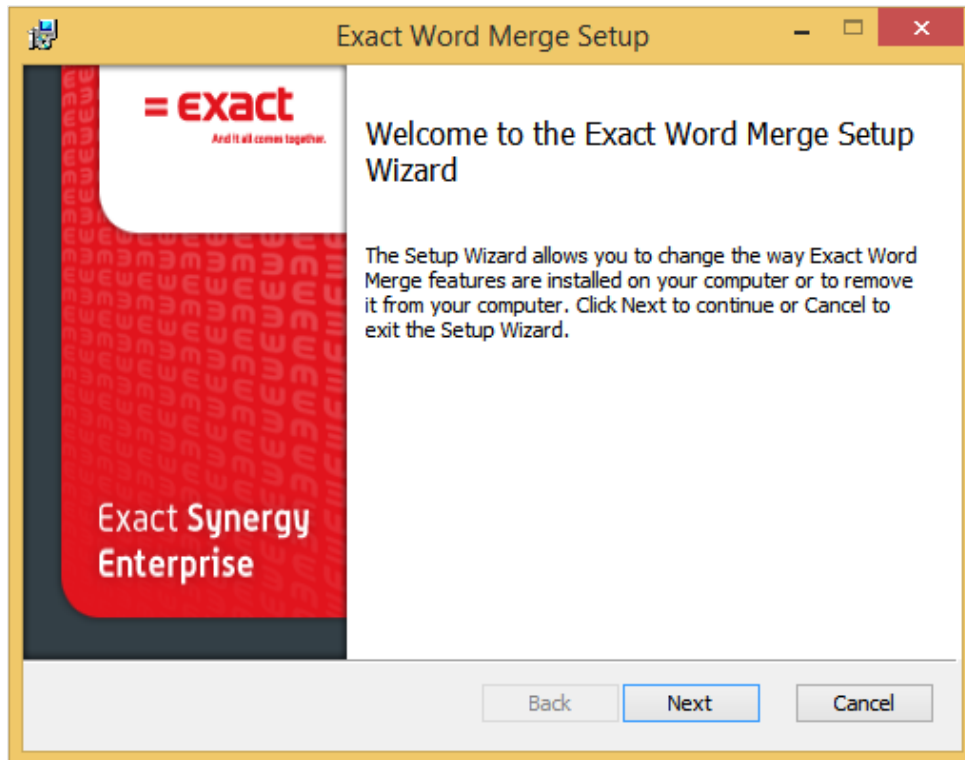


Uninstalling Exact Word Merge Integrator

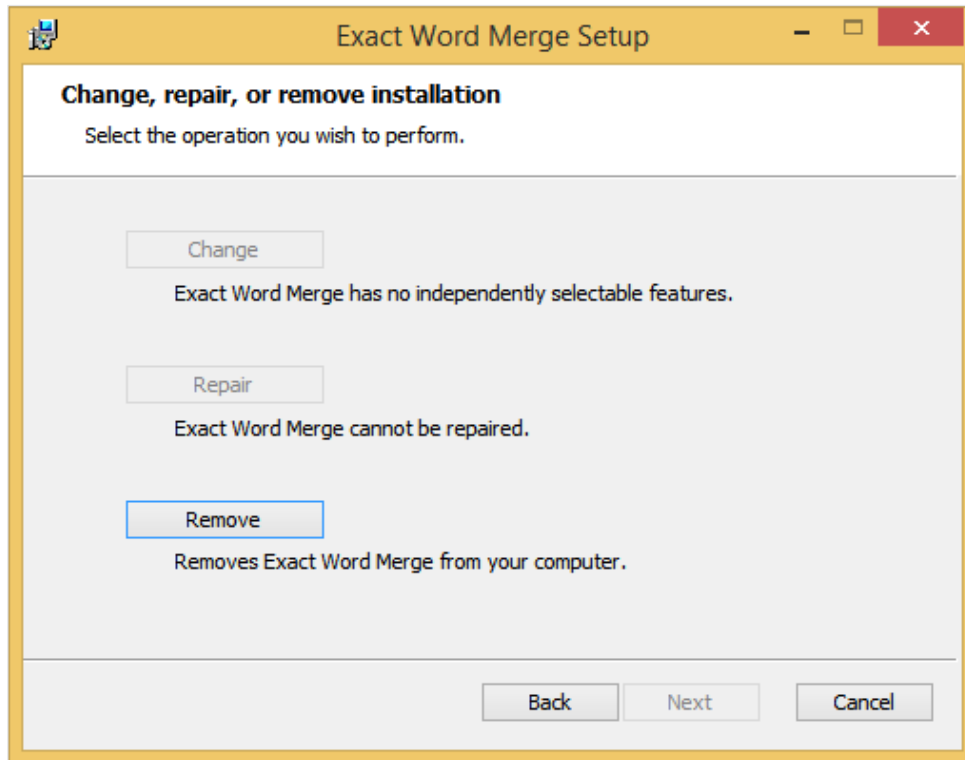
There are two ways to uninstall Exact Word Merge Integrator. You can uninstall Exact Word Merge Integrator via MSI or Control Panel.

To uninstall Exact Word Merge Integrator via MSI:

1. Run the development package **ExactWordMerge.msi** at the server side.




- Click **Next**. The following page will be displayed.



- Click **Remove** to uninstall.

To uninstall Exact Word Merge Integrator via Control Panel:

- Go to Start → Control Panel → Add / Remove Programs.
- Search for the **Exact Word Merge** application.

 Exact Word Merge	Exact Software B. V.	30/11/2015	6.09 MB	5.0.0.70
--	----------------------	------------	---------	----------

- Select the application and click **Uninstall** or **Remove** (depending on your operating system).

Installing XML Mapping Task Pane for Microsoft Word

The new Exact **Word Merge** application offers a wide range of improvements over the mail merge functionality. Among them is a new method of creating **Word Merge** templates directly in Microsoft Word 2007, 2010, and 2013. In order to create templates, XML Mapping Task Pane must first be installed in Microsoft Word 2007, 2010, or 2013. This is done via a third party add-on (the CodePlex). Installing XML Mapping Task Pane for Microsoft Word 2007, 2010, and 2013 will add a new button, **XML Mapping**, to the **Developer** ribbon.

In Microsoft Word 2013, there is a built-in XML Mapping Task Pane, which provides the same functionality. Hence, it is recommended to use this built-in feature if you are using Microsoft Word 2013.

Note:

By downloading XML Mapping Task Pane for Microsoft Word 2007, 2010, and 2013 (the “task pane”), you agree that your use is subject to the license terms and conditions located at <http://xmlmapping.codeplex.com/license>. Additionally, by downloading the task pane, you further acknowledge and agree that you assume all risks in using the task pane, and Exact provides no warranty or support for the task pane. Exact disclaims any losses, claims, damages, and liability whatsoever that may arise from your download and use of the task pane.

Prerequisites

Before installing XML Mapping Task Pane, users must ensure they have the following:

- Microsoft Word 2007, 2010, or 2013 (any version except Office Starter)
- An internet connection (for installation only)
- 5 MB of disk space

The following prerequisites are automatically downloaded and installed as part of the installation process:

- Microsoft.NET Framework 4 Client Profile
- Microsoft Visual Studio 2010 Tools for Office Runtime
- Windows Installer 3.1

If any of these items are not installed, the setup will download and install them automatically, but a reboot may be required.

To download and install XML Mapping Task for Microsoft Word 2007, 2010, or 2013, observe the following steps. However, if you are using Microsoft Word 2013 with the built-in XML Mapping Task Pane, you can go directly to *Enabling XML Mapping Task Pane in Microsoft Word for Microsoft Word 2010 and 2013* in this appendix.

To download XML Mapping Task Pane for Microsoft Word 2007, 2010, or 2013:

1. Open an Internet browser and go to <http://xmlmapping.codeplex.com>.
2. On the page, click **Home** at the main menu if you are not at the home page. The following page will be displayed:

The screenshot shows the CodePlex project page for "XML Mapping Task Pane for Word 2007/2010". The page has a header with the CodePlex logo and navigation links like "Register", "Sign In", and a search bar. Below the header is a navigation menu with tabs: "HOME", "SOURCE CODE", "DOWNLOADS", "DOCUMENTATION", "DISCUSSIONS", "ISSUES", "PEOPLE", and "LICENSE". The "HOME" tab is selected and highlighted with a red box. Below the navigation menu is a section titled "XML Mapping Task Pane for Word 2007/2010" with a description: "The XML Mapping Task Pane for Word can be used to build templates that utilize content controls and XML mapping in Word 2007/2010." Below this is a "Details" section with project information: "CURRENT Version 1.0", "DATE Thu Sep 15, 2011 at 8:00 AM", "STATUS Stable", "DOWNLOADS 7,895", and "RATING 0 ratings". A large purple button labeled "download" is highlighted with a red box. The page also includes links for "Page Info" and "Change History (all pages)".

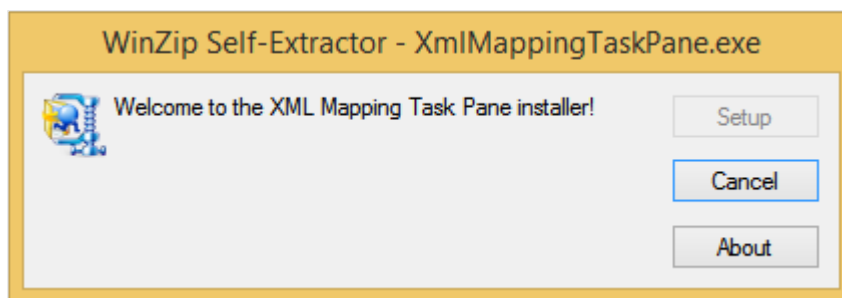
- Click **Download**, and the following page will be displayed:



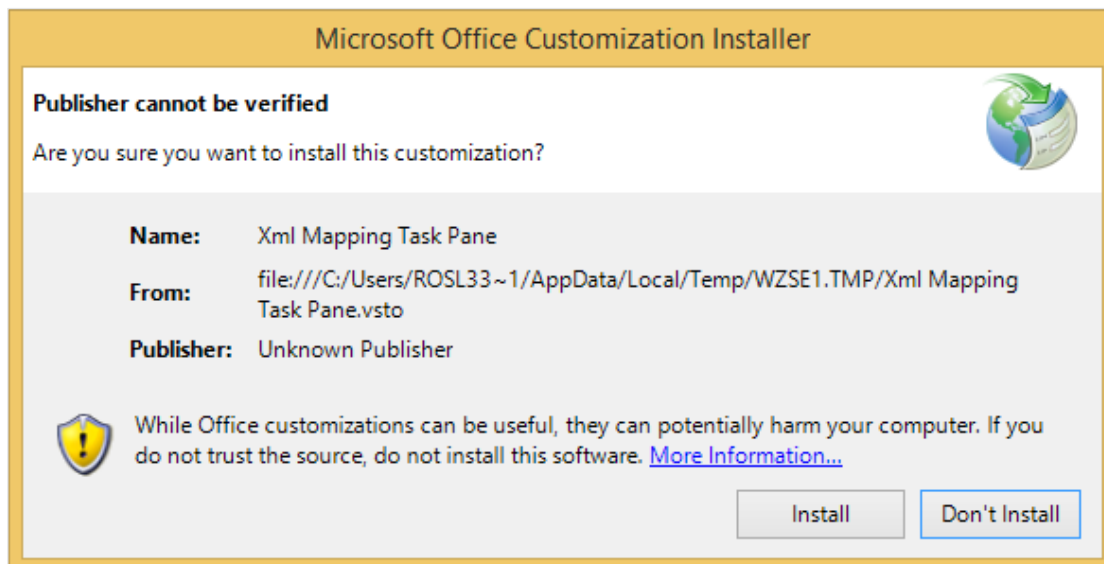
- Click **Run** to run the installation directly after the download or **Save** to save the installation file to a specific location.

To install XML Mapping Task Pane:

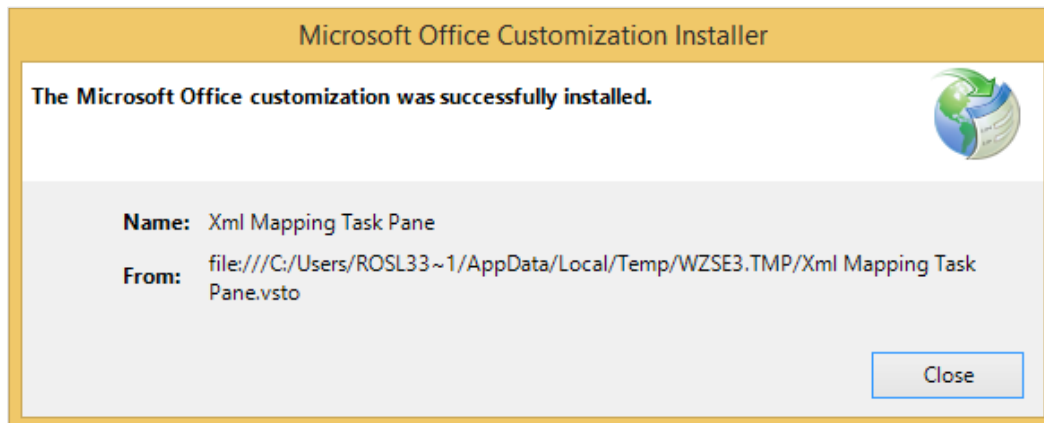
- Before starting the installation, close all opened Microsoft Word documents to allow the installation to run successfully. Locate the installation file and double-click the file to begin the installation. The following screen will be displayed:



- If Microsoft.NET Framework 4 Client Profile, Microsoft Visual Studio 2010 Tools for Office Runtime, or Windows Installer 3.1 is not installed, the XML Mapping Task Pane Setup will be displayed. Click **Accept** to install the prerequisites. If these prerequisites are already installed on your computer, proceed to step 3.
- The installation will proceed and the following screen will be displayed:



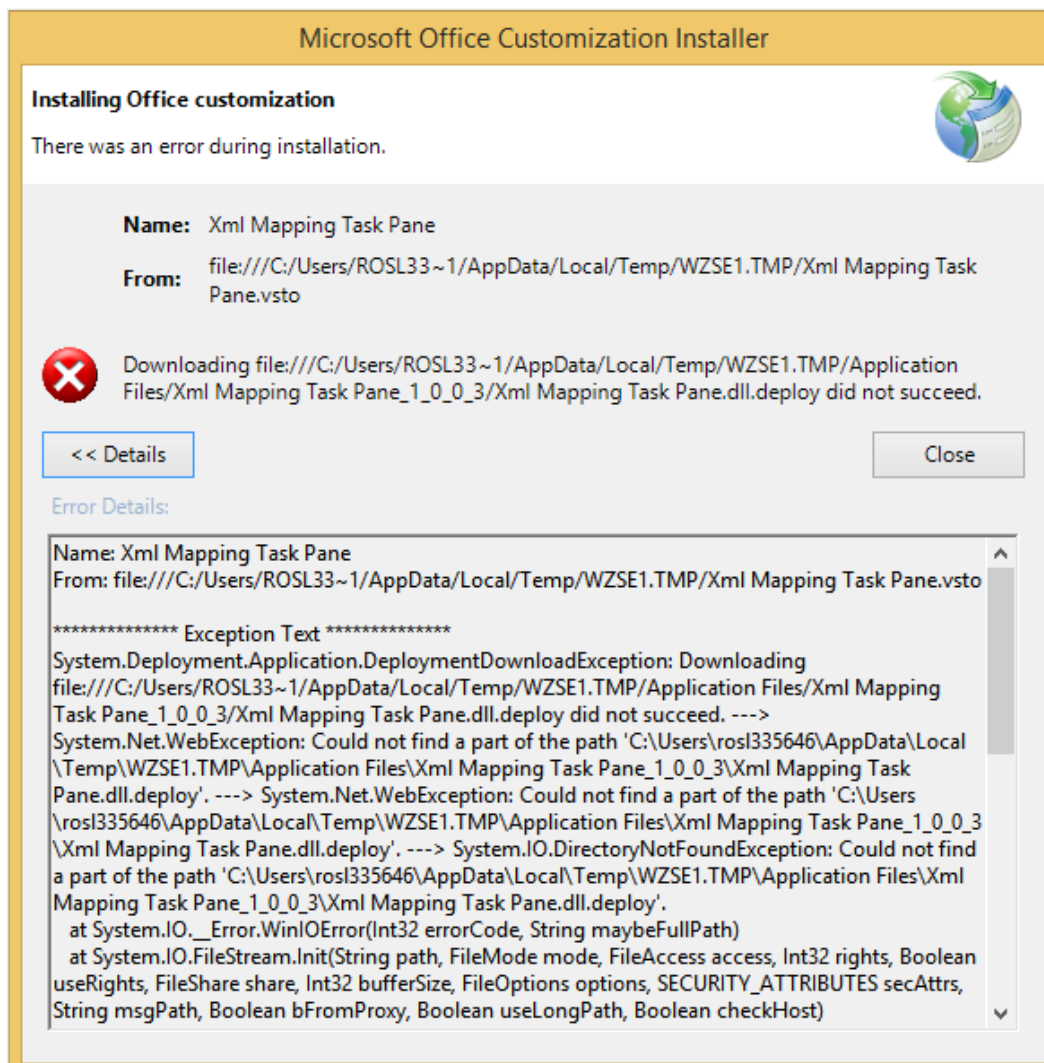
- Click **Install** to start the installation. Upon successful completion of the installation, the following screen will be displayed:



- Click **Close** to exit.

To troubleshoot when XML Mapping Task Pane does not install properly:

- During installation, you may encounter the following error:



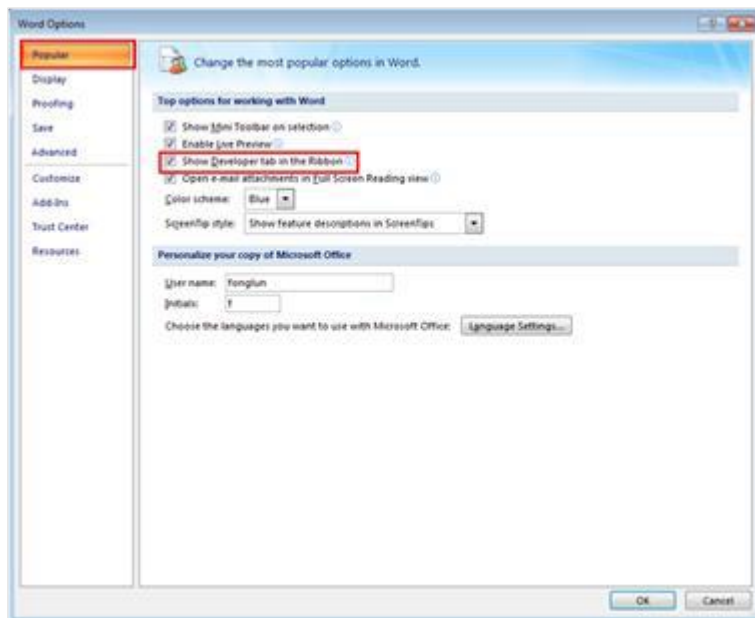
2. To troubleshoot this error, locate the installation file.
3. Right-click on the installation file and select **Properties**.
4. In the **XMLMappingTask Pane Properties** screen, click **Unblock**.
5. Reinstall XML Mapping Task Pane. For more information, see *To install XML Mapping Task Pane* in this appendix.

Enabling XML Mapping Task Pane in Microsoft Word

Upon successful installation of XML Mapping Task Pane, users will have to enable the **Developer** ribbon to access the **XML Mapping** button.

To enable XML Mapping Task Pane in Microsoft Word 2007:

1. Click the **Office** button on the left corner of the Microsoft Word 2007 application.
2. Click Word Options.
3. In the **Word Options** screen, click **Popular** on the left panel.
4. Select the **Show Developer tab in the Ribbon** check box, as displayed in the following:

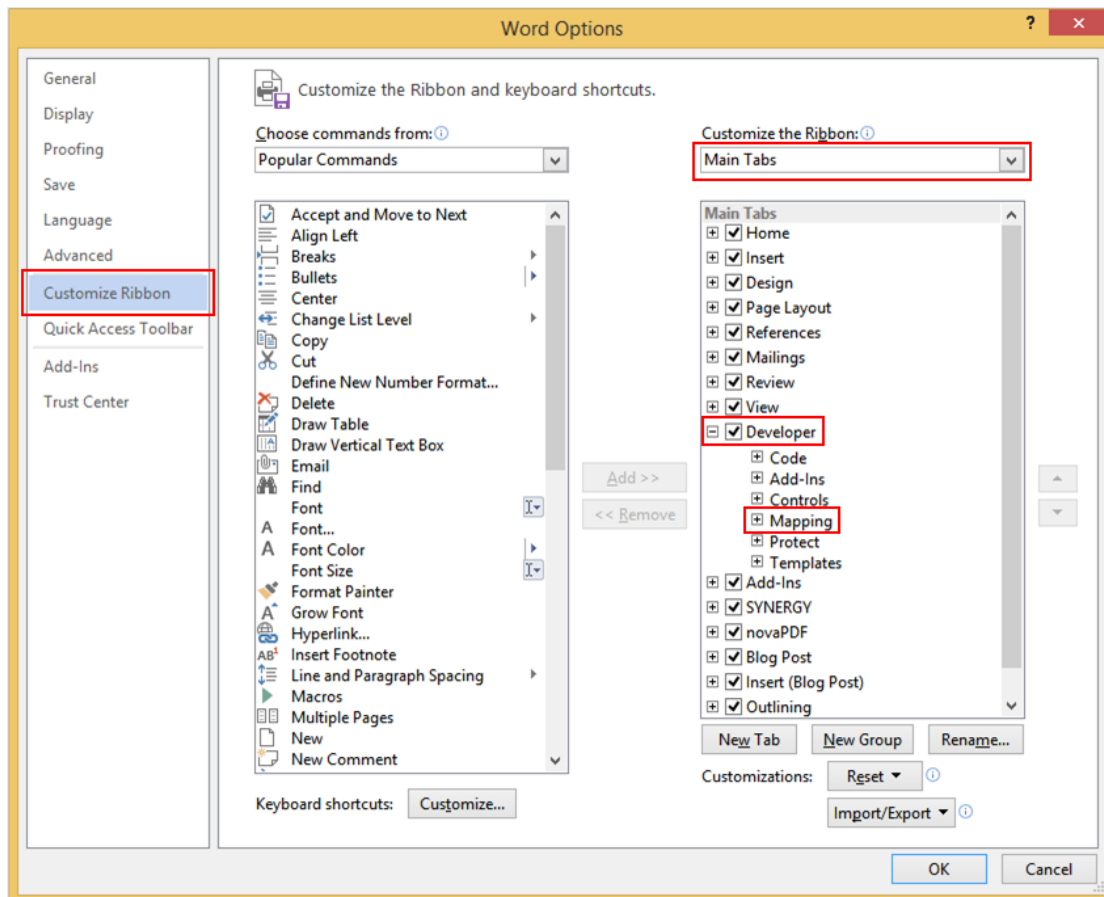


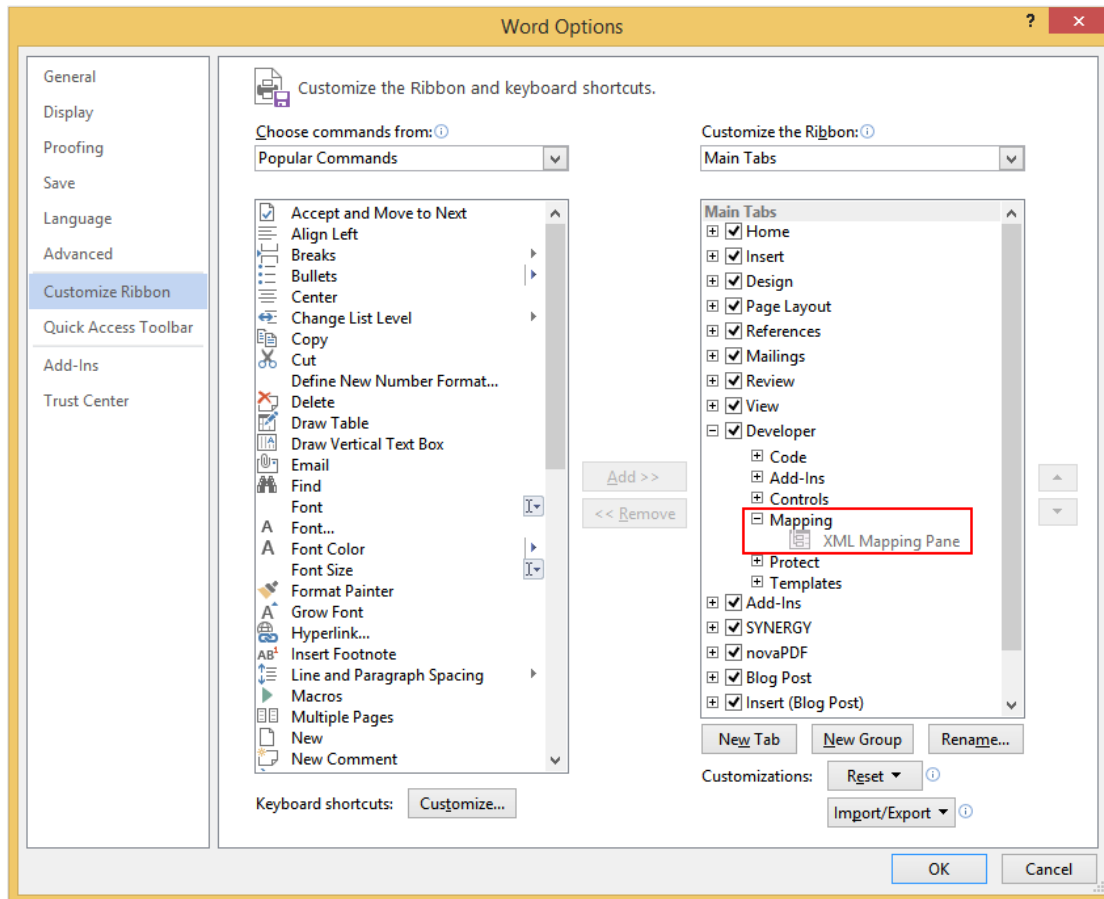
5. Click **OK**.

To enable XML Mapping Task Pane in Microsoft Word 2010 and 2013:

1. Click **File** on the main menu.
2. Click **Options**.
3. In the **Word Options** screen, click the **Customize** ribbon.
4. Select **Main Tabs** at the **Customize the Ribbon** field.

5. Select the **Developer** check box, as displayed in the following:





6. Click **OK**.

Creating Word Merge templates from Word Merge schemas

Exact **Word Merge** offers a wide range of improvements over the mail merge functionality. It introduced the schema, which is used for creating **Word Merge** templates used in the merging process. This section will instruct the user on how to create a **Word Merge** template from a schema.

Prerequisites

To create **Word Merge** templates, users must ensure they have the following:

- Product update 249 or higher of Exact Synergy Enterprise.
- Microsoft Word 2007, 2010, or 2013 (any version except Office Starter).
- The **XML Mapping** task pane for Microsoft Word 2007, 2010, or 2013 and the **Developer** ribbon tab must be enabled. For more information, see *Installing XML Mapping Task Pane for Microsoft 2007, 2010, and 2013* in this appendix.
- Function right **897 – Maintain Word Merge** or **898 – Allow to create Word Merge templates**.

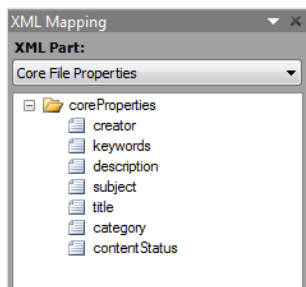
A **Word Merge** template consists of texts or sentences typed by a user, and tags. Tags are parts which will be replaced by data from the database during the merging process. These tags must be inserted into a **Word Merge** template from a pre-defined **Word Merge** schema. Hence, you need to download the **Word Merge** schema (**WordMergeSchema.General.xml**), and then add it to Microsoft Word to create a **Word Merge** template document.

To download Word Merge schemas:

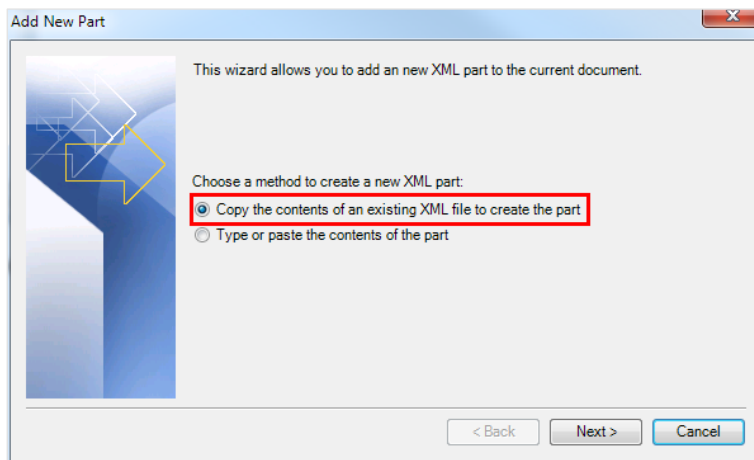
1. Go to Modules → Documents → Setup → Word Merge → Schemas.
2. On the **Word Merge schema** page, expand the **General** schema group.
3. Click the **General** schema.
4. On the **Word merge: Schema – General** page, click **Download**.
5. Save the **WordMergeSchema.General.xml** file.

To add a schema to Microsoft Word:**Microsoft Word 2007, 2010, or 2013:**

1. In Microsoft Word 2007, 2010, or 2013, click the **Developer** ribbon.
2. Click **XML Mapping**. The **XML Mapping** task pane will be displayed, as shown in the following:

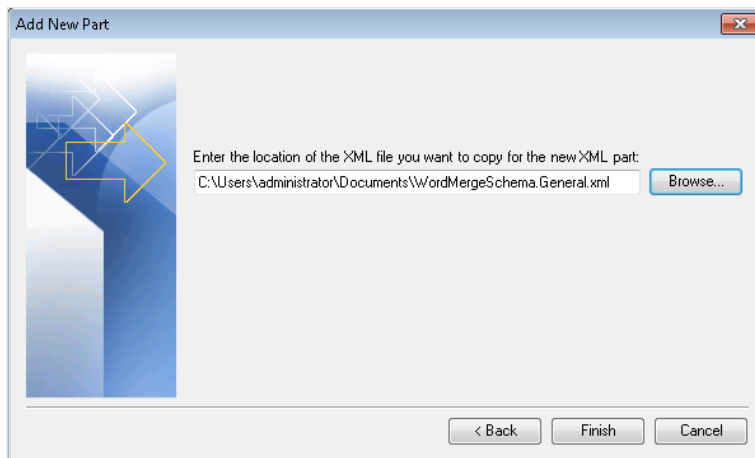


3. Select the **(Add New Part...)** option at the **XML Part** field. The **Add New Part** screen will be displayed, as shown in the following:

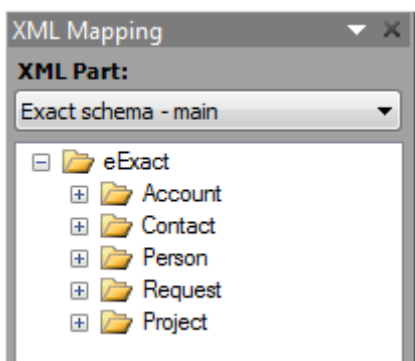


4. Select **Copy** the contents of an existing XML file to create the part.

- Click **Next** and the following screen will be displayed:

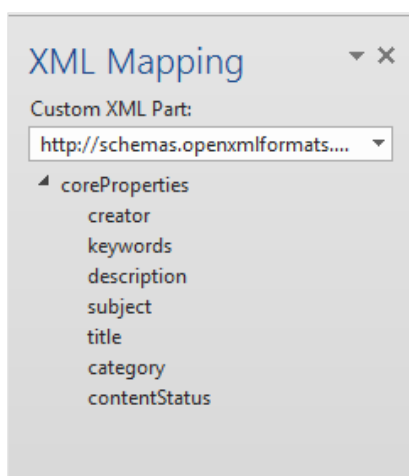


- Click **Browse** to locate the saved WordMergeSchema.General.xml file.
- Click **Finish**. The schema will be selected and displayed in the **XML Mapping** task pane, as displayed in the following:



Microsoft Word 2013:

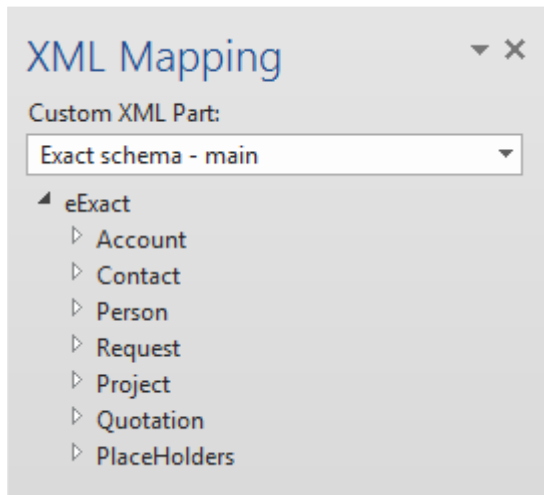
- In Microsoft Word 2013, click the **Developer** ribbon.
- Click **XML Mapping Pane**. The **XML Mapping** task pane will be displayed, as shown in the following:



- Select the **(Add New Part...)** option at the **Custom XML Part** field. The **Open** dialog box will be displayed.

4. Locate the saved WordMergeSchema.General.xml file.
5. Click **Open**.
6. Select **Exact schema – main** at **Custom XML Part**.

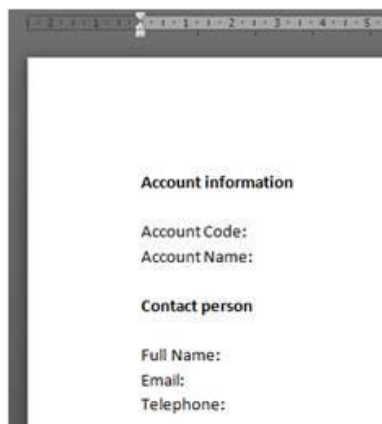
The schema will be selected and displayed in the **XML Mapping** task pane, as displayed in the following:



After the schema has been successfully added to Microsoft Word 2007, 2010, or 2013, a **Word Merge** template document can be created. The following procedures will be based on creating a **Word Merge** template document for the **Account** module.

To create Word Merge template documents:

1. Type some text on a Microsoft Word document, as displayed in the following example:



2. Expand the **Account** folder in the **XML Mapping** task pane, as displayed in the following:

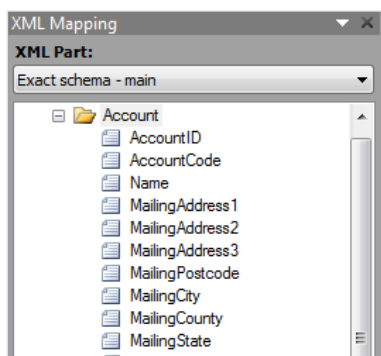


Figure 1: The **XML Mapping** task pane in Microsoft Word 2007 or 2010.

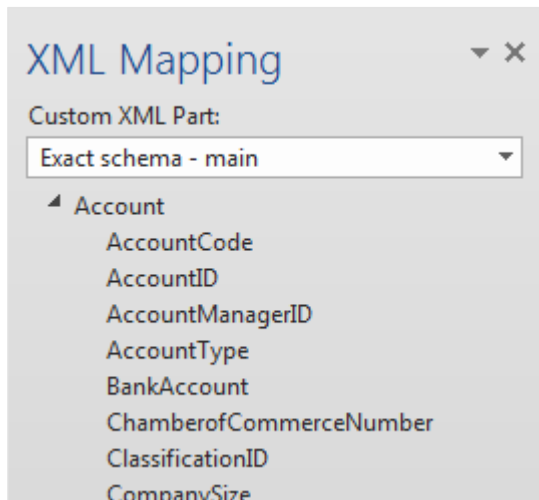


Figure 2: The **XML Mapping** task pane in Microsoft Word 2013.

3. Drag and drop the following tags to the related content under the **Account Information** section on the Microsoft Word document:

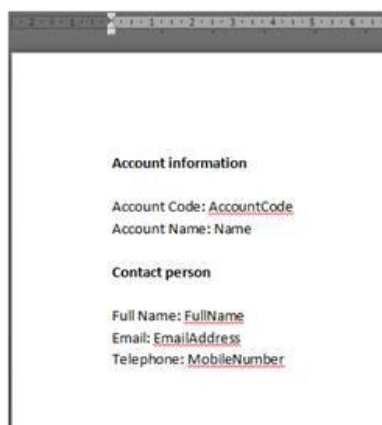
- **AccountCode** to **Account Code**.
- **Name** to **Account Name**.

The tags have now been added to the **Account Information** section on the Microsoft Word document.

4. From the **MainContactPerson** folder in the **XML Mapping** task pane, drag and drop the following tags to the related content under the **Contact person** section on the Microsoft Word document:

- **FullName** to **Full Name**.
- **EmailAddress** to **Email**.
- **MobileNumber** to **Telephone**.

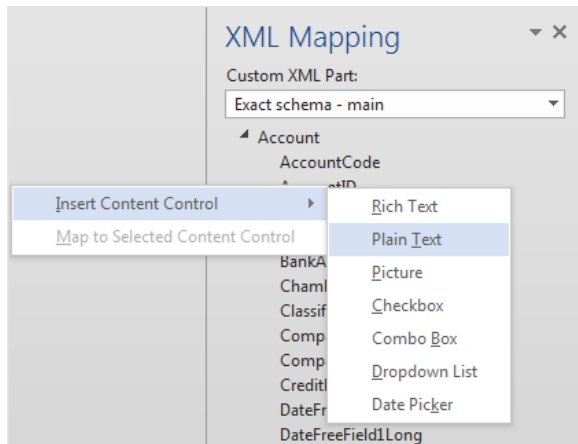
The results should be as displayed in the following example:



5. Save the Microsoft Word document with a **Word Merge** template name, for example, "MyAccountTemplate.docx".

Note:

In Microsoft Word 2013, the drag-and-drop functionality is not available. You can right-click the tag you want to insert, select **Insert Content Control**, and then **Plain Text**, as shown in the following:

**To add pictures to Word Merge template documents:**

1. On a new Microsoft Word document, click the position where you want to insert the image.
2. In the **XML Mapping** task pane, expand the selected folder and right-click the **Picture** tag.
3. Select **Picture** from the **Insert content control** menu.
An image frame is inserted into the document. Adjust the frame size according to your preferences.
4. Save the Microsoft Word document with a **Word Merge** template name, for example, "MyAccountTemplate.docx".

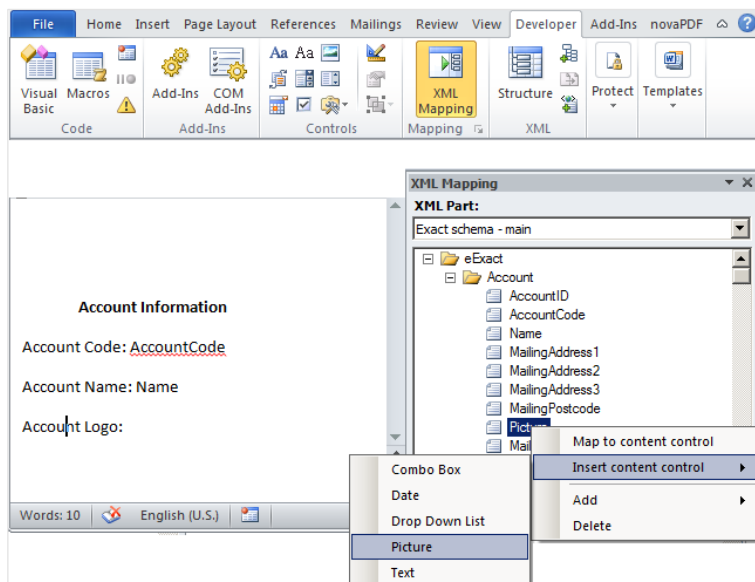


Figure 3: This shows how pictures can be added to a **Word Merge** template document in Microsoft Word 2007 or 2010.

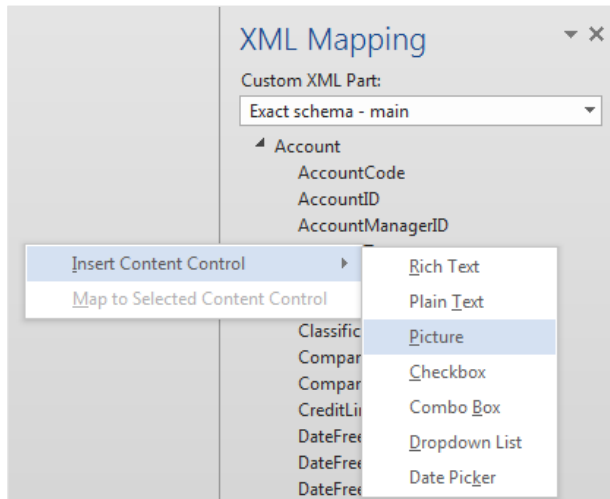


Figure 4: This shows how pictures can be added to a **Word Merge** template document in Microsoft Word 2013.

Note:

You may also add pictures to existing **Word Merge** template documents. Open the existing **Word Merge** template document in Microsoft Word. Follow steps 2 to 3, and then click **Save**.

The created **Word Merge** template document must be uploaded to Exact Synergy Enterprise to create a **Word Merge** template.

To upload Word Merge template documents to Exact Synergy Enterprise:

1. Go to Modules → Documents → Setup → Word Merge → Templates.
2. On the **Word Merge template** page, click **Template: New**.
3. Define the relevant fields.
4. At the **Template (MS Word)** field, click **Browse**.
5. Locate and select the **Word Merge** template document which has been created earlier.
6. Click **Save**.

Note:

- All fields with the “!” icon are mandatory.
- Ensure the relevant template group is selected at the **Group** field. For example, if the **Word Merge** template document is for the **Account** module, select the **Account** template group. For more information, see *Defining Word Merge templates and template group settings* in this appendix.

Activating New Word Merge settings

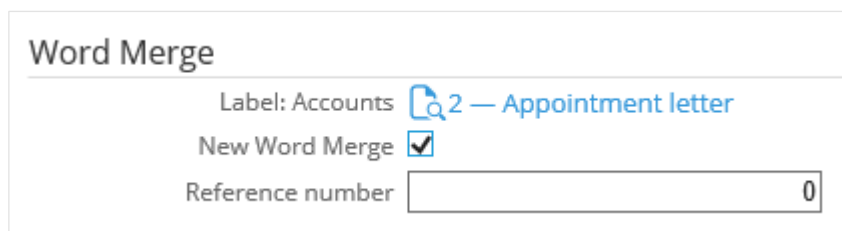
This section describes the settings necessary to activate the **New Word Merge** feature and the **Reference number** field. You can activate the **New Word Merge** feature and **Reference number** field on the **Documents: Settings** page.

To maintain the standard document settings, function right **269 - Maintain standard settings for documents** is required. Users with the **Documents administrator** and **Web administrator** roles have this function right.

To view, create, or modify template groups and templates, function right **897 – Maintain Word Merge** or **898 – Allow to create Word Merge templates** is required. Users with the **Documents administrator** role have these function rights.

To activate New Word Merge feature:

1. Go to Modules → Documents → Setup → Maintenance → Settings.
2. Under the **Word Merge** section, select the **New Word Merge** check box.



3. At **Reference number**, type a number to be used as the reference number on letters and e-mails.

Note:

This number must be an integer, positive, and less than 2,147,483,646. It increases when performing each merge and may increase multiple times when performing bulk merging processes.

4. Click **Save**, and then **Close** to exit.

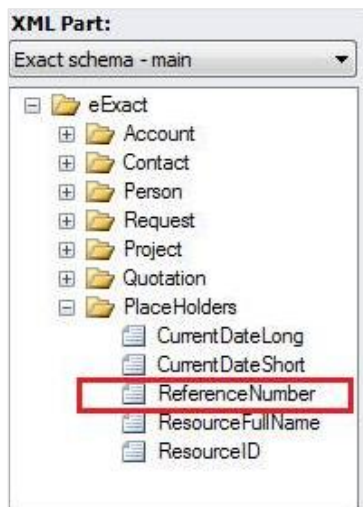
Enabling Reference number field to be used in Word Merge templates

You can use reference numbers to track letters and e-mails. The reference number is one of the information available in Exact Synergy Enterprise which you can make use of to create your templates.

To enable the Reference number field to be used in Word Merge templates:

1. Go to Modules → Documents → Setup → Word Merge → Templates.
2. Click **Template: New**. Otherwise, select the required template under the **Templates** section.
3. Under the **Settings** section at **Reference number**, select the **Yes** check box.
4. Click **Save**, and then **Close** to exit.

Now, the **Reference number** field is ready to be used as a tag in the **Word Merge** schema to create your templates. For more information, see *Extending Word Merge schemas* and *Creating Word Merge templates from Word Merge schemas* in this appendix.



Note:

When users select a template which supports reference numbers, the reference number indication (**ref: xxxx**) will be displayed next the **Subject** field on the **Create letter** page and **Send email** page. After the merging process has been successfully completed, you can use the reference number generated to search for the document.

Defining Word Merge templates and template groups settings

Templates are created in Microsoft Word. Upon creating templates, you can categorize the templates in groups and define the settings for the templates and template groups to send predefined e-mails or letters in corporate style. You can set access rights to limit who can use the templates or template groups, based on roles and people.

To view, create, or modify template groups and templates, function right **897 – Maintain Word Merge** or **898 – Allow to create Word Merge templates** is required. Users with the **Documents administrator** role have these function rights.

To define Word Merge template group settings:

1. Go to Modules → Documents → Setup → Word Merge → Templates.
2. Click **Template group: New**.

The screenshot shows the 'Word Merge: Template group - New' form. At the top, there are buttons for 'Close', 'Save', and 'Save + New'. Below these are four fields: 'Name' (empty text box with a warning icon), 'Description' (empty text box), 'Module' (dropdown menu set to 'Account'), and 'Edit rights' (empty text box with a warning icon).

3. Type the relevant information at **Name** and **Description**.

- At **Module**, select **Account**, **Person**, **Request**, or **Project** to link a module to the template group. Only templates linked to a certain module will be displayed when a user performs a merge from the same module. For example, if a user performs a merge from a request, only templates linked to the **Workflow** module will be displayed.
- At **Edit rights**, type or select a function right to be linked to the template group. Only a person with the selected function right will be able to edit the templates under the new group.
- Click **Save**, and then **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

To define Word Merge template settings:

- Go to Modules → Documents → Setup → Word Merge → Templates.
- Click **Template: New**.

Word Merge: Template - New

Close Save Save + New

General

Group

Name

Description

Template (MS Word) Browse...

Document type

Language English

Merge type ☐ Card ☐ Search ☒ Both

Merge method ☐ Letter ☐ Email ☒ Both

Security level Internal 10

Inherit security from the group ☒

Settings

Subject Editable

Save a copy ☐ Yes ☒ Editable

Attachments ☒ Editable Document

From Default Editable

To: Single Account Editable

To: Bulk Account Editable

Content ☒ Account ☒ Editable

☐ Contact ☒ Editable

☐ Person ☒ Editable

☐ Request ☒ Editable

☐ Project ☒ Editable

☐ Quotation ☒ Editable

Reference number ☐ Yes

- Under the **General** section at **Group**, select a template group in the **Name** column.
- Type the relevant information at **Name** and **Description**.
- At **Template (MS Word)**, click **Browse** to select the required template document which has been created in Microsoft Word. This is mandatory. For more information, see *Creating Word Merge templates from Word Merge schemas* in this appendix.
- At **Document type**, select a document type for the final merged document. **Word Merge** will create a document based on the selected document type when the template is used for merging.

7. At **Language**, select the language to be used for the tags in the template. Only tags that support different languages will be affected.
8. At **Merge type**, select the check box next to the merge type that the template is allowed to be used for merging, as described in the following:
 - **Card** — Select this option for single merge processes only.
 - **Search** — Select this option for bulk merge processes only.
 - **Both** — Select this option for both single and bulk merge processes.
9. At **Merge method**, select the merge method that the template is allowed to use.
 - **Print** — Select this option for creating letter merge processes only.
 - **Email** — Select this option for creating e-mail merge processes only.
 - **Both** — Select this option for creating letter and e-mail merge processes.
10. At **Security level**, select a security level for the template. Only people with the same security level or higher will be allowed to use the template.
11. Select the **Inherit security from the group** check box to allow the template to inherit the same access rights based on roles and people from the template group. By default, it is selected.
12. Under the **Settings** section, define the required fields.
13. At **Reference number**, select the **Yes** check box to apply the reference numbers on the e-mails and letters predefined at **Reference number** field on the **Documents: Settings** page.
14. Click **Save**, and then **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

You can define how the users can access to the selected template based on roles and people predefined in the **Word Merge** templates and template groups only after you have created the templates and template groups.

To define access rights (roles) for Word Merge templates and template groups:

1. Go to Modules → Documents → Setup → Word Merge → Templates.
2. Click the required template group under the **Templates** section.

Note:

To define access rights for **Word Merge** templates, expand the required template group under the **Templates** section, and then select the required template.

3. On the selected template group page or template page, click the **Roles** tab.
4. Click **New** under the **Roles** section.
5. On the **Role: Template group** page or **Role: Template** page, at **Role**, select a role to be linked to the template group or template. This will define the required roles allowed for specific access to the template group or template.
6. At **Level**, select the required level specific to the selected role at **Role**, as described in the following:
 - **Corporate** — Select this option to link the template group or template to the role at a corporate level.
 - **Group** — Select this option to link the template group or template to the role at a group level.
 - **Division** — Select this option to link the template group or template to the role at a division level.
 - **Cost center group** — Select this option to link the template group or template to the role at a cost center group level.

- **Cost center** — Select this option to link the template group or template to the role at a cost center level.

7. Click **Save**, and then **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

To define access rights (people) for Word Merge templates and template groups:

1. Go to Modules → Documents → Setup → Word Merge → Templates.
2. Click the required template group under the **Templates** section.

Note:

To define access rights for **Word Merge** templates, expand the template group under the **Templates** section, and then select the required template.

3. On the selected template group page or template page, click the **People** tab. Click **New** under the **People** section.
4. On the **Person: Template group** page or **Person: Template** page, at **Person**, select the required person to be linked to the template group or template. This will define the specific person allowed to view and access the template group or template for the specified roles at **Role**.
5. Click **Save**, and then **Close** to exit.

Note:

All fields with the “!” icon are mandatory.

Creating e-mails with Word Merge

You can create e-mails with **Word Merge** on single and bulk processes. To perform **Word Merge**, function rights **160 – Allows mail merge from resource search** and **194 - Shows mail merge button in resource dossier** are required. Users with the **General manager**, **HR**, and **HR assistant** roles have these function rights.

To perform **Word Merge** from accounts search, function right **200 - Allows to export account data from search results** or **275 - Allows batch updates of accounts** is required. Users with the **Marketing manager** role have these function rights.

The following example describes how to create an e-mail using **Word Merge** on bulk processes. You can also perform the same procedures, to create e-mails using **Word Merge** on bulk processes based on contacts, requests, or people search results via or Modules → Customers → Reports → Contacts → Search, Modules → Workflow → Reports → Requests → Search, or Modules → HRM → Reports → People → Search.

To create e-mails using Word Merge on bulk processes based on accounts search results:

1. Go to Modules → Customers → Reports → Accounts → Search.
2. Define the search criteria, and then click **Show**.
3. Click Create email.
4. On the **Templates** page, select the required template.
5. Under the **Header** section, type the subject matter of the e-mail at **Subject**.
6. At **From**, select the sender's e-mail based on the following options:
 - **Default email** — Select this option to use the default e-mail address.

- **Person email** — Select this option to use the person e-mail address. This e-mail address must be predefined in the personal card.
- **Division email** — Select this option to use the division e-mail address. This e-mail address must be predefined in the HRM organization setup.

7. At **To**, select the intended recipients based on the following options:

- **Account** — Select this option to send an e-mail to the selected accounts.
- **Contact (Main)** — Select this option to send an e-mail to the main contact of selected accounts.
- **Contact (Selected)** — Select this option to send an e-mail to the selected contact of selected accounts.
- **Contact (All)** — Select this option to send an e-mail to all contacts of selected accounts.
- **Person** — Select this option to send an e-mail to selected person or people.
- **Contact (Request)** — Select this option to send an e-mail to the selected requests in your workflow.

Note:

The availability of these options varies, depending on the respective search page which you are accessing from, to send the e-mails.

8. Select the **Save a copy** check box to save a copy of the e-mail as a document in Exact Synergy Enterprise.
9. Select the **Limit to one email per email address** check box to send one e-mail to a single address.
10. Under the **Attachments** section, at **Document**, select a document to be attached to the e-mail, if any.
11. Under the **Content** section, select the required data by selecting the check boxes next to the data to be used in the merge process. By default, all data listed are selected.
12. Select the **Preview template** link to view the selected template in Microsoft Word.
13. Click **Send email** to start the **Word Merge** bulk merging process.
14. Upon successfully completing the process, the confirmation message, "The emails are being generated. A task will appear in your workflow, when the emails have been sent. You can check the status at: XXX" will be displayed. Click the hyperlink to display the **Word Merge: Log** page. Alternatively, you can directly view the status of the merging process on **Word Merge: Log** page. For more information, see *Viewing Word Merge log report* in this appendix.
15. Click **Close** to exit.

Note:

- All fields with the "!" icon are mandatory.
- Depending on the template settings, you may or may not be able to edit certain fields, such as **Subject**, **From**, and **To** as these fields may contain pre-filled values. The settings also determine if the current merging supports the **Reference number** feature. For more information, see *Defining Word Merge templates and template group settings*, *Activating New Word Merge settings*, and *Enabling Reference number field to be used in Word Merge templates* in this appendix.
- The merged documents will be linked to the respective cards according to the selected recipients.

The following example describes how to create an e-mail using **Word Merge** on single processes based on account cards. You can also perform the same procedures, to create e-mails using **Word Merge** on single processes based on contact cards, personal cards, project cards, request pages, or on the **Document: New** page, via Modules → Customers → Reports → Contacts → Search, Modules → HRM → Reports → People → Search, Modules → Projects → Reports → Search → Projects, Modules → Workflow → Reports → Requests → Search, or Modules → Documents → Entry → Entry → Document: New.

To create e-mails using Word Merge on single processes based on account cards:

1. Go to Modules → Customers → Reports → Accounts → Search.
2. Define the search criteria, and then click **Show**.
3. Select the required account, contact, person, request, or project, and then click **Create email**. Similarly, click **Create email** on the **Document: New** page.
4. On the **Templates** page, select the required template.
5. Under the **Header** section, type the subject matter of the e-mail at **Subject**.
6. At **From**, select sender's e-mail based on the following options:
 - **Default email** — Select this option to use the default e-mail address.
 - **Person email** — Select this option to use the person e-mail address. This e-mail address must be predefined in the personal card.
 - **Division email** — Select this option to use the division e-mail address. This e-mail address must be predefined in the HRM organization setup.
7. At **To**, select the respective recipient to send the e-mail to the selected recipient. If the check box is not selected, no e-mail will be sent.
 - **Account** — Type or select an account at **Account**, and then select the check box next to the **Account** to send an e-mail to the selected account. These options will be automatically defined if you accessed the **Word Merge: Send email** page from an account card or a contact card.
 - **Contact** — Select a contact to send an e-mail to selected contact. This field will be automatically defined if you accessed the **Word Merge: Send email** page from a contact card.
 - **Reseller** — Select a reseller to send an e-mail to selected reseller. This option will not be displayed if you accessed the **Word Merge: Send email** page from a person card.
 - **Person** — Type or select a person ID to send an e-mail to selected person. This field will be automatically defined if you accessed the **Word: Merge: Send email** page from a person card.
 - **Account manager** — Type or select an account manager at **Account manager**, and then select the check box next to the **Account manager** to send an e-mail to the selected account manager. These options are available if you accessed the **Word: Merge: Send email** page from a project card.
 - **Project manager** — Type or select a project manager at **Project manager**, and then select the check box next to the **Project manager** to send an e-mail to the selected project manager based on end date of the project. These options are available if you accessed the **Word: Merge: Send email** page from a project card.
 - **Project members** — Select this check box to send an e-mail to the active project members. This option is available if you accessed the **Word: Merge: Send email** page from a project card.

Note:

The availability of these options varies, depending on the respective cards you are accessing from, to send the e-mails.

8. Select the **Save a copy** check box to save a copy of the e-mail as a document in Exact Synergy Enterprise.
9. Under the **Attachments** section at **Document**, type or select a document to be attached to the e-mail, if any.
10. Under the **Content** section, define the required fields which will contain the data to be used in the merge process.
11. Select the **Preview template** link to view the selected template in Microsoft Word.
12. Click **Send email** to start the **Word Merge** single merging process.
13. Upon successfully completing the process, the confirmation message, "Your email has been sent and is saved to Synergy. Document number: XX.XXX.XXX" will be displayed. Click the hyperlink to display the **Word Merge: Log** page. Alternatively, you can directly view the status of the merging process on **Word Merge: Log** page. For more information, see *Viewing Word Merge log report* in this appendix.
14. Click **Close** to exit.

Note:

- All fields with the “!” icon are mandatory.
- Depending on the template settings, you may or may not be able to edit certain fields, such as **Subject**, **From**, and **To** as these fields may contain pre-filled values. The settings also determine if the current merging supports the **Reference number** feature. For more information, see *Defining Word Merge templates and template group settings*, *Activating New Word Merge settings*, and *Enabling Reference number field to be used in Word Merge templates* in this appendix.
- The error message, “Error: The email could not be sent.” will be displayed if the process fails or takes longer than 30 seconds.

Creating letters with Word Merge

You can create letters with **Word Merge** on single and bulk processes. To perform **Word Merge**, function rights **160 – Allows mail merge from resource search** and **194 - Shows mail merge button in resource dossier** are required. Users with the **General manager**, **HR**, and **HR assistant** roles have these function rights.

To perform **Word Merge** from accounts search, function right **200 - Allows to export account data from search results** or **275 - Allows batch updates of accounts** is required. Users with the **Marketing manager** role have these function rights.

The following example describes how to create a letter using **Word Merge** on bulk processes based on accounts search results. You can also perform the same procedures, to create letters using **Word Merge** on bulk processes based on contacts, requests, or people search results via or Modules → Customers → Reports → Contacts → Search, Modules → Workflow → Reports → Requests → Search, or Modules → HRM → Reports → People → Search.

To create letters using Word Merge on bulk processes based on accounts search results:

1. Go to Modules → Customers → Reports → Accounts → Search.
2. Define the search criteria, and then click **Show**.
3. Click **Create letter**.
4. Select the required template.
5. Under the **Header** section, type the subject matter of the letter at **Subject**.
6. Under the **Content** section, select the required data by selecting the check boxes next to the data to be used in the merge process. By default, all data listed are selected.
7. Select the **Preview template** link to view the selected template in Microsoft Word.
8. Click **Create letter** to start the **Word Merge** bulk merging process.
9. Upon successfully completing the process, the confirmation message, “The letters are being generated. A task will appear in your workflow, when the letters are ready to be printed. You can check the status at: XXX” will be displayed. Click the hyperlink to display the **Word Merge: Log** page. Alternatively, you can directly view the status of the merging process on **Word Merge: Log** page. For more information, see *Viewing Word Merge log report* in this appendix.
10. Click **Close** to exit.

Note:

- All fields with the “!” icon are mandatory.
- Depending on the template settings, you may or may not be able to edit the **Subject** field as this field may contain a pre-filled value. The settings also determine if the current merging supports the **Reference number** feature. For more information, see *Defining Word Merge templates and template group settings*, *Activating New Word Merge settings*, and *Enabling Reference number field to be used in Word Merge templates* in this appendix.
- The merged document will be linked to the respective cards according to the selected recipients.

The following example describes how to create a letter using **Word Merge** on single processes based on account cards. You can also perform the same procedures, to create letters using **Word Merge** on single processes based on contact cards, personal cards, project cards, quotation cards, request pages or on **Document: New** page, via Modules → Customers → Reports → Contacts → Search, Modules → HRM → Reports → People → Search, Modules → Projects → Reports → Search → Projects, Modules → Customers → Reports → Quotations → Search, Modules → Workflow → Reports → Requests → Search, or Modules → Documents → Entry → Entry → Document: New.

To create letters using Word Merge on single processes based on account cards:

1. Go to Modules → Customers → Reports → Accounts → Search.
2. Define the search criteria, and then click **Show**.
3. Select the required account, contact, person, request, or project, and then click **Create letter**. Similarly, click **Create letter** on the **Document: New** page.
Note: If you are accessing via quotation cards, click **Generate Quotation**.
4. On the **Templates** page, select the required template.
5. Under the **Header** section, type the subject matter of the letter at **Subject**.
6. Under the **Content** section, define the required fields which will contain the data to be used in the merge process.
7. Select the **Preview template** link to view the selected template in Microsoft Word.
8. Click **Create letter** to start the **Word Merge** single merging process.
9. Upon successfully completing the process, the confirmation message, “Your letter is saved to Synergy. Document number: XX.XXX.XXX” will be displayed. Click the hyperlink to display the **Word Merge: Log** page. Alternatively, you can directly view the status of the merging process on **Word Merge: Log** page. For more information, see *Viewing Word Merge log report* in this appendix.
10. Click **Close** to exit.

Note:

- All fields with the “!” icon are mandatory.
- Depending on the template settings, you may or may not be able to edit certain fields, such as **Subject** as this field may contain a pre-filled value. The settings also determine if the current merging supports the **Reference number** feature. For more information, see *Defining Word Merge templates and template group settings*, *Activating New Word Merge settings*, and *Enabling Reference number field to be used in Word Merge templates* in this appendix.
- If **Synergy Office Integration** is installed, the merged document will be automatically opened in Microsoft Word upon successfully completing the **Word Merge** process. If not, the system will prompt the user to either open or save the merged document.
- The error message, “Error: The letter could not be created.” will be displayed if the process fails or takes longer than 30 seconds.

Viewing Word Merge log report

You can view the merged documents after creating letters and sending e-mails with **Word Merge** on both single and bulk processes. All users are able to view the **Word Merge** merging log report.

To view merged documents on the Word Merge log report:

1. On the **Word Merge: Log** page, define the search criteria, and then click **Refresh**.
2. The list of merging process results will be displayed.
3. Click the required **Word Merge** merging process hyperlink in the **ID** column with the status **Completed** to view the merged documents.

Note:

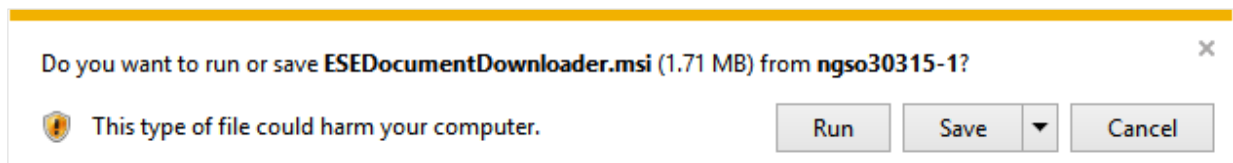
You can print bulk merged letter documents at one go. For more information, see *Installing Exact Synergy Enterprise Document Downloader* in this appendix.

Installing Exact Synergy Enterprise Document Downloader

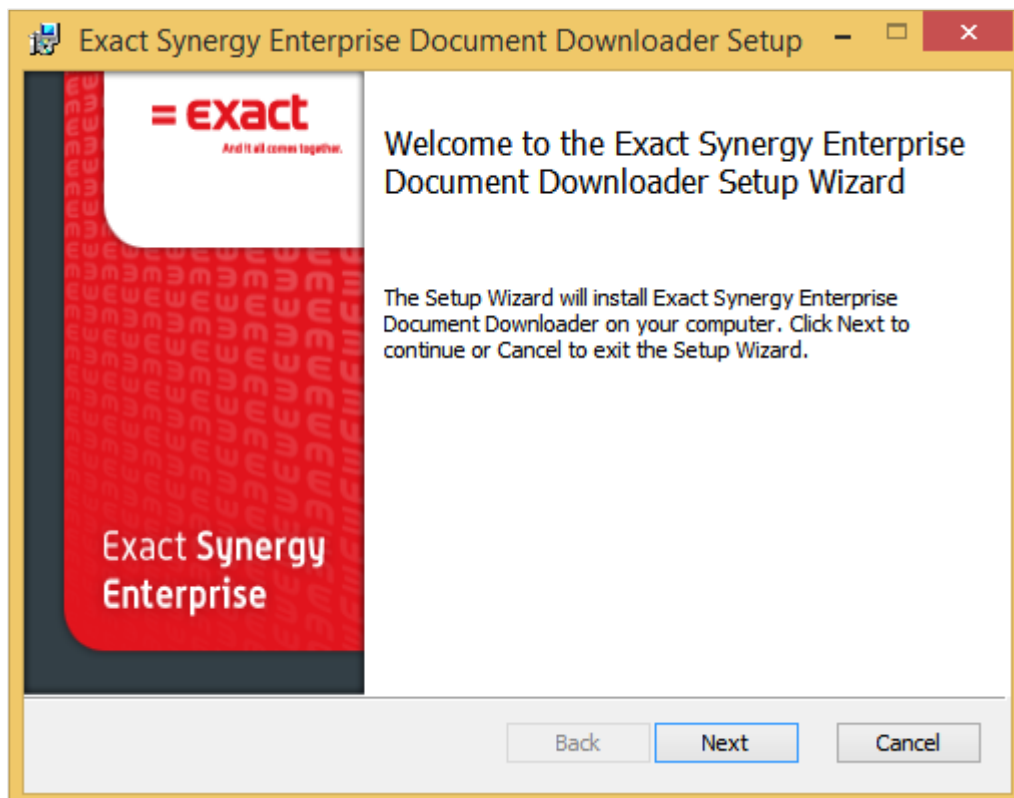
The bulk merging feature allows you to create letters and send e-mails to a group of recipients. You can print these merged documents individually or print the bulk merged documents from **Exact Synergy Enterprise Document Downloader**. This section describes how to install and print the bulk merged documents directly from **Exact Synergy Enterprise Document Downloader**. This feature is applicable for **Bulk Merge** documents only.

To install Exact Synergy Enterprise Document Downloader:

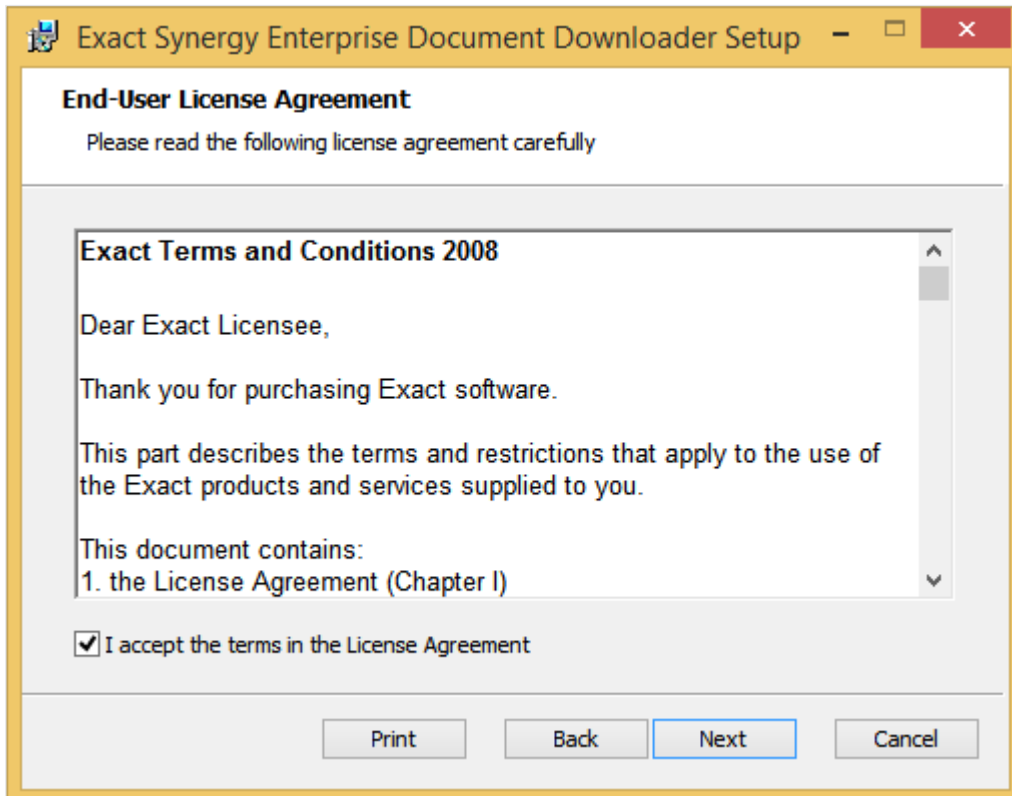
1. Go to Modules → System → Setup → Other.
2. Select Installation: Exact Synergy Enterprise Document Downloader.
3. Click **Run** to install the **ESEDocumentDownloader.msi**. You can also click **Save** to save the file on your computer and run it later. If the following message is displayed, click **Run** to proceed.



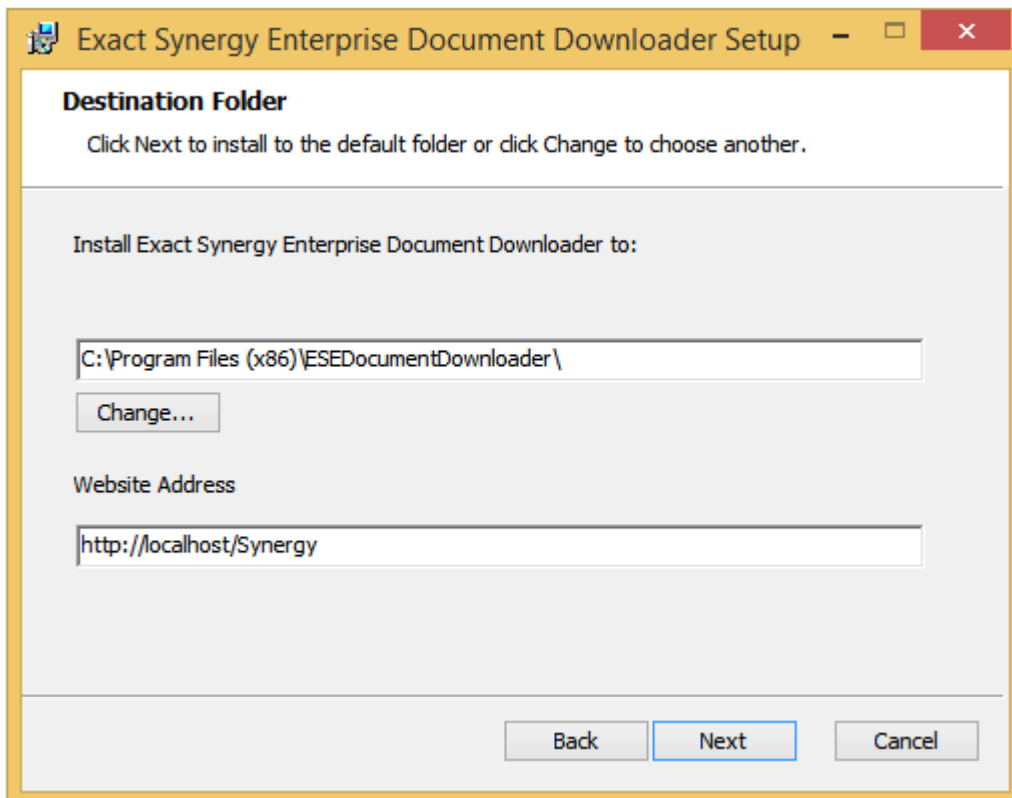
4. The Exact Synergy Enterprise Document Downloader Setup page will be displayed.



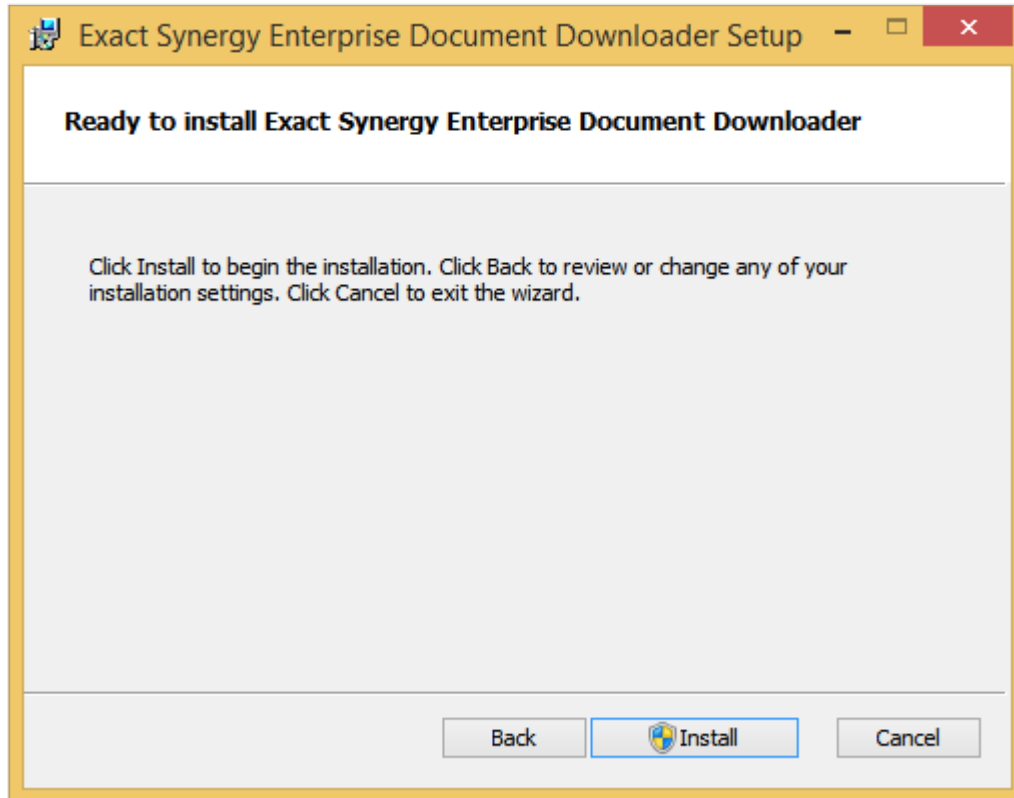
5. Click **Next**. The following page will be displayed:



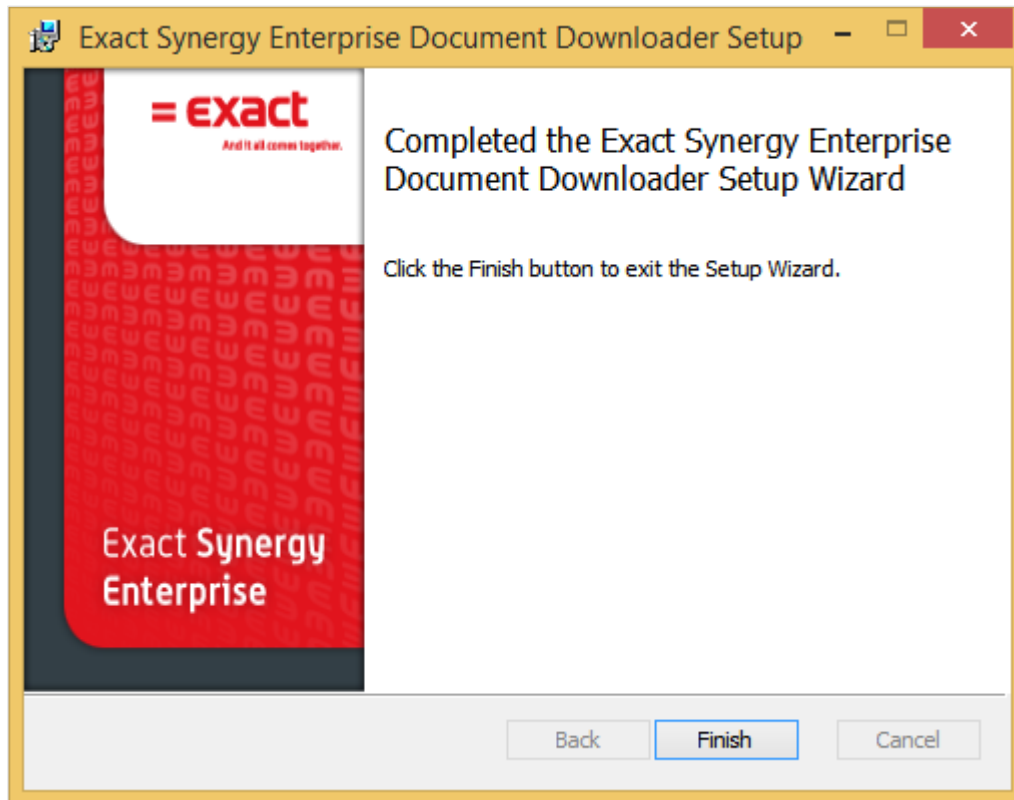
6. Select the **I accept the terms in the License Agreement**, and then click **Next**. The following page will be displayed:



7. At **Install Exact Synergy Enterprise Document Downloader to**, by default, the destination folder is defined. Click **Change** to choose another path for the installation.
8. At **Website Address**, type the web site address where Exact Synergy Enterprise is located, for example "http://dbike.com/Synergy".
9. Click **Next**. The following page will be displayed:



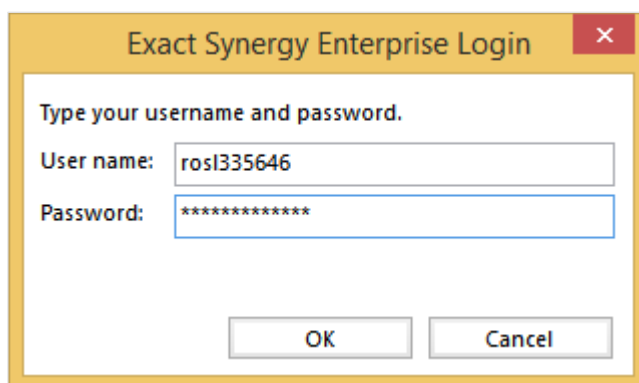
10. Click **Install** to begin the installation.



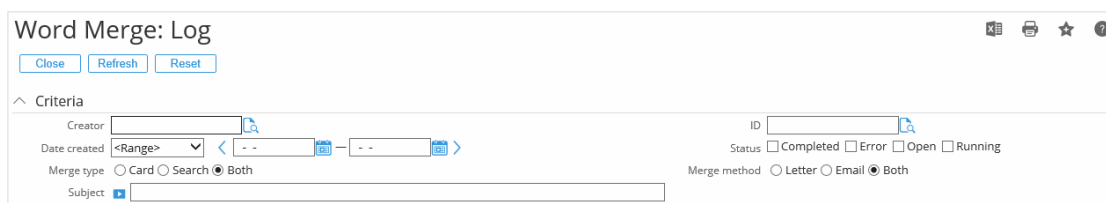
11. Once the installation has completed, click **Finish** to exit the page.

To print bulk merged documents using Exact Synergy Enterprise Document Downloader:

1. Go to Start → All Programs → Document Downloader.
2. Log in to Exact Synergy Enterprise Document Downloader.



3. At **User name**, type the same username as used in the Exact Synergy Enterprise.
4. At **Password**, type the same password as used in the Exact Synergy Enterprise.
5. Click **OK**. The following page will be displayed:



6. On the left menu, click the **Print letters** hyperlink to display the **Word Merge: Log** page.

10. Select a printer and define the required preferences. Click **OK** to print the bulk merged documents.

Note:

The **Word Merge: Log** feature in **Exact Synergy Enterprise Document Downloader** will only display bulk merged document results on letters created with the status **Completed**.

Extending Word Merge schemas

Exact **Word Merge** now allows you the flexibility to create additional entities and fields for the metadata and schemas used in generating **Word Merge** templates. This section will guide you on how to add entities and fields to metadata and schemas.

To merge any template, the **Word Merge** engine requires a series of information to be able to read information from the Exact Synergy Enterprise database. A template contains merge fields which come from a schema. A **Word Merge** schema contains all available fields to be used in a template. By using these fields in the template, the **Word Merge** engine will find their equivalent fields in the metadata. The metadata contains the actual field name and table information of that field, and by using these information, **Word Merge** creates a specific query for each template (based on the fields used) to retrieve the data and merge the template.

Therefore, if you want to modify or extend **Word Merge** fields, you need to modify both the metadata and schema files. Throughout this section, the **Person** entity will be used and extended for all the examples and explanations.

Note:

All text values, attributes, and element names in the XML files are case-sensitive. However, table and column names are not case-sensitive.

The following requirements must be met to create additional entities and fields for metadata and schemas:

- You must have Exact Synergy Enterprise product update 250 or higher installed.
- You must have Exact Word Merge Integrator installed. For more information, see *Installing Exact Word Merge Integrator* in this appendix.
- You will require basic knowledge in database, metadata, and schema structure. For more information, see *Exact Synergy Enterprise Database Documentation Startpage* (ID 18.127.775) in Exact Synergy Enterprise.

Creating metadata

In Exact Synergy Enterprise, the schema is based on a metadata file named **MailMergeTags.xml**. This XML file contains following elements:

Attribute	Description
Entity	<ul style="list-style-type: none"> • Represents a table in a database which is presented in the XML format. • Consists of columns and joins to other entities.
Field	Represents a column in the entity.
Join	Represents a join within the entity or other entities.

Note:

It is mandatory for the new metadata to follow the format of the default metadata file **MailMergeTags.xml**.

The following is the step-by-step guide to add new metadata to the existing metadata in Exact Synergy Enterprise.

To create XML files for metadata:

1. In the text or XML editor, instantiate a metadata structure by inserting the **<eExact>** tag and **<Entities>** tag as shown in the following:

```
<eExact>

    <Entities>

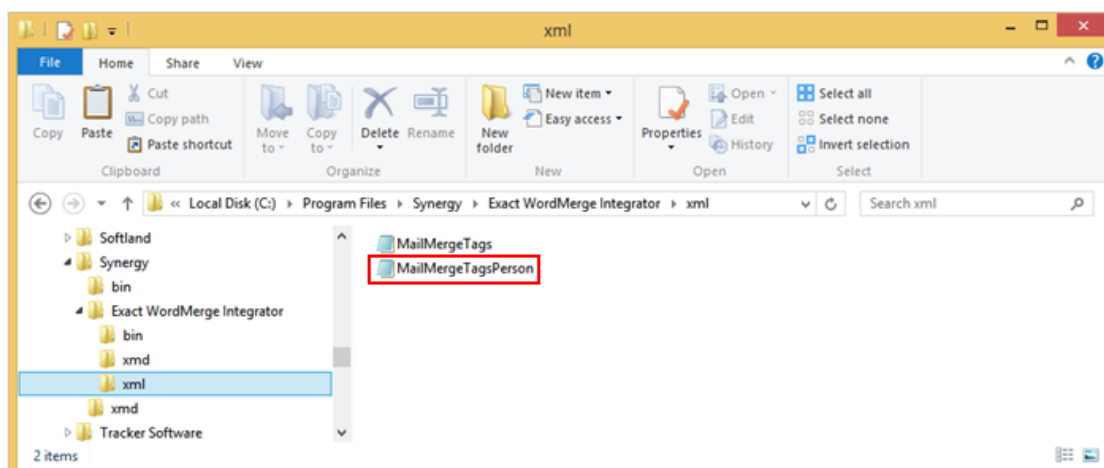
</Entities>

</eExact>
```

2. Save the file in the XML format in the **xml** folder with a file name that begins with the prefix **MailMergeTags**, such as **MailMergeTags_Accounts.xml** or **MailMergeTagsPerson.xml**. You need to save this file in the **xml** folder in which you have installed Exact Word Merge Integrator (usually this folder is stored within the **Synergy** folder where Exact Synergy Enterprise is installed). The final location address should look like: "C:\Synergy\Exact WordMerge Integrator\XML".

Note:

This is mandatory as the merging process acknowledges only the file with the prefix name of "MailMergeTags*.xml" file residing within the default folder where the general metadata file is stored.



The XML file created for the metadata will be saved as **MailMergeTagsPerson.xml**.

To add new or extend existing entities:

1. Open the **MailMergeTagsPerson.xml** file from the text or XML editor.
2. Insert the **<Entity>** tag within the **<Entities>** tag and define the values of the attributes for the entity.

For example, if you are extending the **Person** entity, your XML should look like the following:

```
<eExact>

  <Entities>

    <Entity name="Person" tableName="humres" keyField="res_id">

    </Entity>

  </Entities>

</eExact>
```

If the entity name exists in the master metadata (**MailMergeTag.xml**) of which you are extending, the **Word Merge** engine will be able to detect this and add your changes to the existing entity. If the entity name does not exist in the master metadata, you are adding a new entity.

The following is the reference table for the **<Entity>** tag and the descriptions of its available attributes:

Attribute	Description
name	The unique name of the entity, which is used in the schemas, metadata, joins, and other references.
tableName	The actual name of the table in the database where this entity points to.
keyField	The primary key (unique identifier) of the table, which reflects what is defined in the repository.

3. To specify the column to be used, insert the **<Fields>** tag within the **<Entity>** tag. For each column, add a **<Field>** tag within the **<Fields>** tag and define the values of the attributes for the field, as shown in the following example:


```

<eExact>

  <Entities>

    <Entity name="Person" tableName="humres" keyField="res_id">

      <Fields>

        <Field name="SkypeID" fieldName="SkypeID" />

        <Field name="MSN" fieldName="MsnID" />

      </Fields>

    </Entity>

  </Entities>

</eExact>

```

The following is the reference table for the **<Field>** tag and the descriptions of its available attributes:

Attribute	Description
name	The unique name of the field, which is used in the schemas, metadata, joins, and other references.
fieldName	The actual name of the column in the database where this field points to.
sql	Retrieves the value of the field from the SQL statement or SQL function execution. Note: <ul style="list-style-type: none"> The "{0}." prefix must be used in the SQL statements when accessing any column from the current entity, such as "SELECT oms60_0 FROM Land WHERE landcode = {0}.cmp_fctry". The fieldName attribute should be not filled when using the sql attribute.
patchType	Transforms the final value of the field. Currently, the attribute supports four (4) modes: <ul style="list-style-type: none"> Term: Returns the value according to a term ID. For example, patchType="1". Format number: Returns the output in a numeric format. For example, patchType="2,2". The first number in the patch mode indicates the number formatting. The second number in the patch mode indicates the decimal points in the output number. Format date time: Returns a specified output in the date format according to the Exact Synergy Enterprise setting for the time format and format option after the patch mode. For example, patchType= "3,2" refers to the short date format and patchType= "3,7" to the long date format. "0" for date and time, "4" for short time, "5" for date time seconds, "6" for date time milliseconds, "7" for long date time, "9" for day month, and "10" for day long date. Format yes\no: Returns the output according to the value "1" for "Yes" and "0" for "No", which is then translated into the template language. For example, patchType="4".
exclude	This field is for internal use only, and its value does not affect the merge result.

In another example, by adding the following lines in XML, you will add two new entities to the metadata:

```
<eExact>

  <Entities>

    <Entity name="HrSkills" tableName="hrsk" keyField="ID">

      <Fields>

        <Field name="Res_ID" fieldName="res_id" />

        <Field name="Description" fieldName="skill_type" />

      </Fields>

    </Entity>

    <Entity name="HrRoles" tableName="hrroles" keyField="ID">

      <Fields>

        <Field name="Res_ID" fieldName="EmpID" />

        <Field name="Level" sql="(SELECT Description FROM HRRoleLevels WHERE ID = {0}.RoleLevel)" />

        <Field name="Role" sql="(SELECT Description FROM HRRoleDefs WHERE ID = {0}.RoleID)" />

      </Fields>

    </Entity>

  </Entities>

</eExact>
```

These two new entities are **HrSkills** and **HrRoles**. These are later used in this section to join them to the **Person** entity. As shown, the combination of the field name and **sql** attributes is used for each entity.

4. To join or refer an entity to another, insert the **<Joins>** tag within the **<Entity>** tag. For each join, add a **<Join>** tag within the **<Joins>** tag and define the values of the attributes for the join, as shown in the following example:

```
<Entity name="Person" tableName="humres" keyField="res_id">

  <Joins>

    <Join name="Skills" lookUpEntity="HrSkills" lookUpJoinType="left" fieldName="res_id" lookUpKey="Res_ID" />

    <Join name="Roles" lookUpEntity="HrRoles" lookUpJoinType="left" fieldName="res_id" lookUpKey="Res_ID" />

  </Joins>

</Entity>
```

The following is the reference table for the **<Joins>** tag and the descriptions of its available attributes:

Attribute	Description
name	A unique join name which will be used in schemas (a join name must be unique in the scope of its parent entity, and its name cannot be the same as another field name).
lookUpEntity	The entity name which is referenced to the parent entity.
lookUpJoinType	This field indicates the type of join, its values are limited to inner , left , right , and full .
fieldname	The actual column name in the current entity, which is a foreign key for this join.
lookUpKey	The name of another field in the reference entity on which the join is to be created.

Note:

A new entity must be joined by at least one of the existing fixed entities (**Person**, **Contact**, **Account**, **Quotation**, **Project**, or **Request**, except **PlaceHolders**). Otherwise, it cannot be used in the schema. There are more advanced ways to create joins, but only the most common join is described in this section.

5. Save your XML file.

Creating repeating lines

Joins connect two entities together. However, if the child table contains more than one record for the parent record, the information will be repeated. Each person can have multiple skills and several roles, such **Skills** and **Roles**. To avoid repeating data and to be able to create a template that understands and use this repeated data, you can mark any join as a repeating join.

For example, if the **<Repeating>** tag is added to the previous example, your metadata should look like the following:

```
<Entity name="Person" tableName="humres" keyField="res_id">
  <Joins>
    <Join name="Skills" lookUpEntity="HrSkills" lookUpJoinType="left" fieldName="res_id" lookUpKey="Res_ID" Repeating="yes" />
    <Join name="Roles" lookUpEntity="HrRoles" lookUpJoinType="left" fieldName="res_id" lookUpKey="Res_ID" Repeating="yes" />
  </Joins>
</Entity>
```

Note:

It is possible to create a repeating line template for **Skills** and **Roles**, similar to quotation lines. For more information, see *Creating Word Merge templates for quotations with repeating lines* in this appendix.

Creating schemas

Once the metadata has been created and updated, it can be updated to the schema. The default schema is also an XML file with the file name of **WordMergeSchema.General.xml** and is located in the **xml** folder where you have installed Exact Synergy Enterprise. It is better to create another schema rather than edit an existing one, as the file will be overwritten when Exact Synergy Enterprise is updated.

By following the examples in this section, you would have created two entities (**HrRoles** and **HrSkills**) and extended an existing entity **Person**. Your metadata should look like the following:

```
<eExact>
  <Entities>
    <Entity name="HrSkills" tableName="hrsk" keyField="ID">
      <Fields>
        <Field name="Res_ID" fieldName="res_id" />
        <Field name="Description" fieldName="skill_type" />
      </Fields>
    </Entity>

    <Entity name="HrRoles" tableName="hrroles" keyField="ID">
      <Fields>
        <Field name="Res_ID" fieldName="EmpID" />
        <Field name="Level" sql="(SELECT Description FROM
HRRoleLevels WHERE ID = {0}.RoleLevel)" />
        <Field name="Role" sql="(SELECT Description FROM
HRRoleDefs WHERE ID = {0}.RoleID)" />
      </Fields>
    </Entity>

    <Entity name="Person" tableName="humres" keyField="res_id">
      <Fields>
        <Field name="SkypeID" fieldName="SkypeID" />
        <Field name="MSN" fieldName="MsnID" />
      </Fields>
      <Joins>
        <Join name="Skills" lookUpEntity="HrSkills"
lookUpJoinType="left" fieldName="res_id" lookUpKey="Res_ID" Repeating="yes" />
        <Join name="Roles" lookUpEntity="HrRoles"
lookUpJoinType="left" fieldName="res_id" lookUpKey="Res_ID" Repeating="yes" />
      </Joins>
    </Entity>
  </Entities>
</eExact>
```

To use these new fields and create a template based on them, a schema for this metadata must be created.

Note:

It is important to note the only seven entities, namely **Account**, **Contact**, **Person**, **Request**, **Project**, **Quotation**, and **PlaceHolders** are shown as the main entities (folders) in the schema. You can join any entity to all these main entities except to **PlaceHolders**. The other entities are displayed as nested subfolders according to their joins with the main entities.

To create XML files for schemas:

1. In the text or XML editor, insert the **<eExact>** tag and give a name to the namespace. This namespace will be used by Microsoft Word when you import it in a document.

```
<eExact xmlns="New Schema">

</eExact>
```

2. Save it as an XML file. Give this file any name and save the file to the location you require. In this section, the file will be saved as **Exact_MySchema.xml**.

To create schemas for new entities:

A schema has a very simple structure. It starts with a root tag **<eExact>** and continues with the name of the main entities.

1. Firstly, indicate which main entity you are changing. In this section, the **Person** entity will be changed. Therefore, this must be added into the schema:

```
<eExact xmlns="New Schema">

    <Person>

    </Person>

</eExact>
```

2. Each tag represents an entity or a field. If you have added a new entity or field for **Person**, your schema should look like the following:

```
<eExact xmlns="New Schema">

    <Person>

        <[Field Name]>[TEXT]</[Field Name]>

        <SkypeID>Skype ID</SkypeID>

        <MSN>MSN ID</MSN>

    </Person>

</eExact>
```

The **SkypeID** and **MSN** are the field names which have been added to the **Person** entity.

- Next, add new joins to the **Person** entity. To add new joins, add new elements under the **Person** entity. In this case, the **Roles** and **Skills** joins are added:

```
<eExact xmlns="New Schema">

  <Person>

    <SkypeID>Skype ID</SkypeID>

    <MSN>MSN ID</MSN>

    <Roles>

    </Roles>

    <Skills>

    </Skills>

  </Person>

</eExact>
```

- To add new entity fields into a schema, add them accordingly based on their entities, in this case, the **Level**, **Role**, and **Description**. You can skip the fields which you do not want to use in the schema (like the foreign keys):

```
<eExact xmlns="New Schema">

  <Person>

    <SkypeID>Skype ID</SkypeID>

    <MSN>MSN ID</MSN>

    <Roles>

      <Level>Level</Level>

      <Role>Role Name</Role>

    </Roles>

    <Skills>

      <Description>Description</Description>

    </Skills>

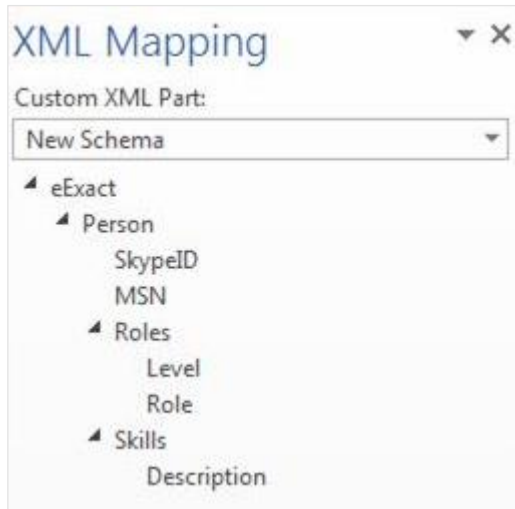
  </Person>

</eExact>
```

- Save your schema.

When you have saved the schema, you can use it to create your template. Open the schema in Microsoft Word. For more information, see *Creating Word Merge templates from Word Merge schemas* in this appendix.

Your schema should look like the following example:



The following example shows how you can transform your metadata to a schema easily:

Schema

Metadata



Creating Word Merge templates for quotations with repeating lines

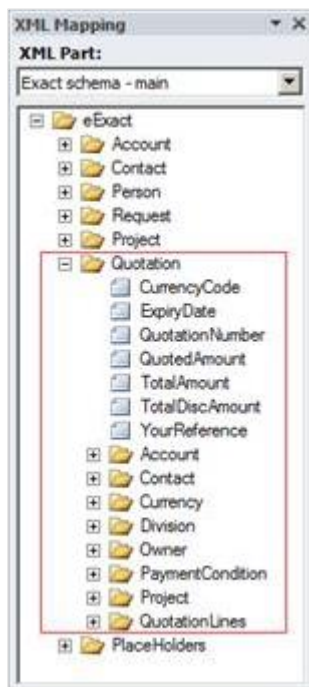
The **Word Merge** engine supports merging quotation items by adopting the concept of repeating lines. Hence, each quotation can include multiple items. This section describes how to create templates for quotations with repeating lines and includes instructions on how to use the latest schemas to create **Word Merge** templates for quotations that can be uploaded to Exact Synergy Enterprise.

To view, create, or modify template groups and templates, function right **897 – Maintain Word Merge** or **898 – Allow to create Word Merge templates** is required. Users with the **Documents administrator** role have these function rights.

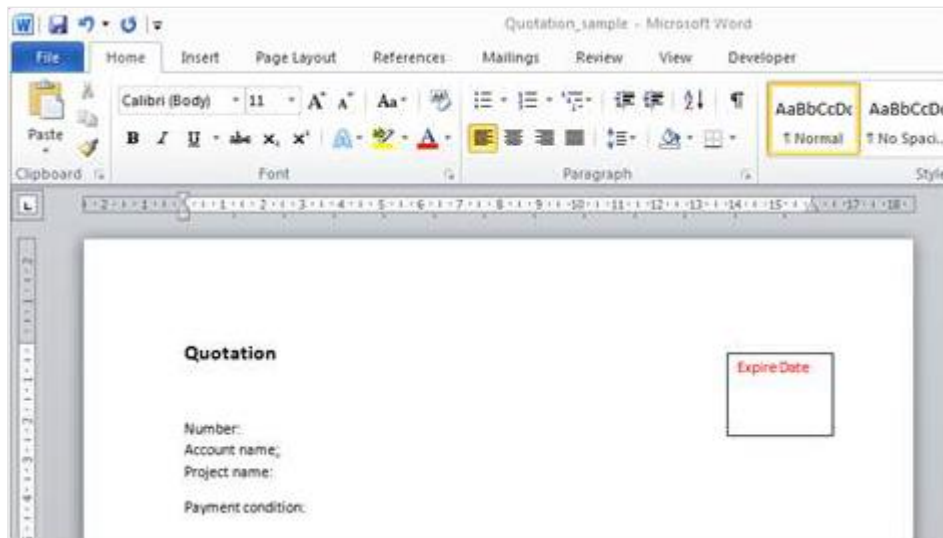
To create Word Merge templates for quotations with repeating lines:

Quotation header

1. Download the latest version of **Word Merge** schema that includes the quotation tags. For more information, see *Creating Word Merge templates from Word Merge schemas* in this appendix.
2. After opening the new schema in your Microsoft Word document, you will be able to see the **Quotation** folder in the **XML Mapping** task pane.



3. In a new Microsoft Word document, start typing some data to build a quotation in your document, as shown the following example:



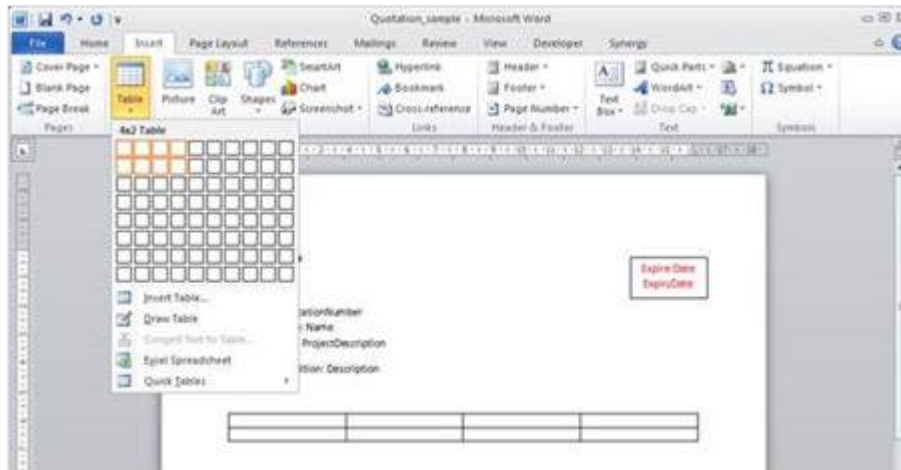
4. Expand the **Quotation** folder in the **XML Mapping** task pane.
5. Drag and drop the corresponding tags to the related content from task pane. The following example displays the results after the tags have been added to a Microsoft Word document.



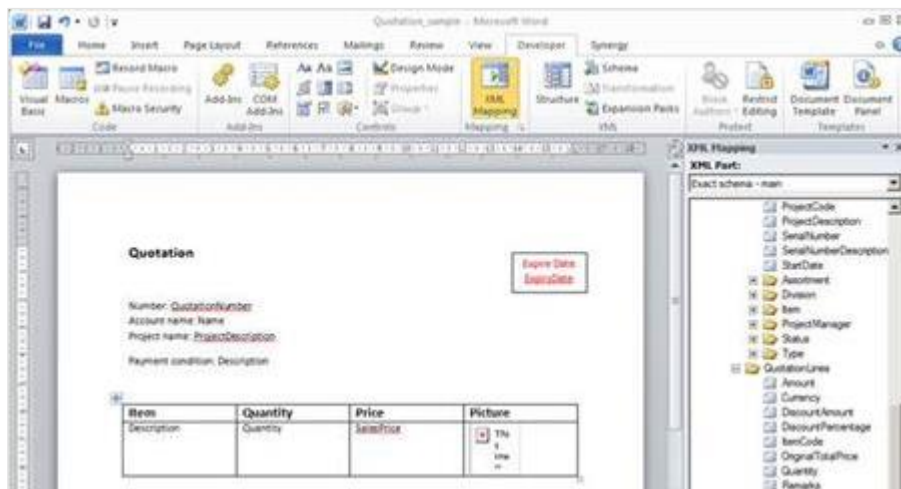
6. Save the Microsoft Word document with a template name, such as "QuotationTemplate.docx".

Quotation lines

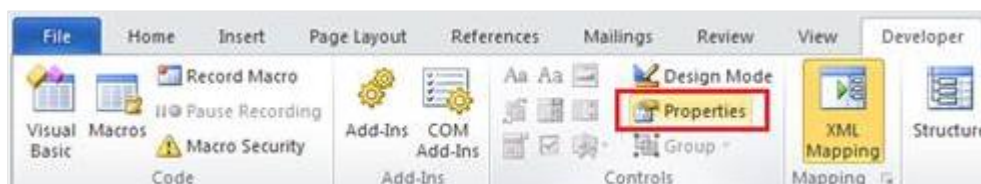
1. Repeating line works with tables. To use them, firstly, create a table. To do so, in the same Microsoft Word document from the previous section, click the **Insert** ribbon and click the **Table** icon to insert a table.



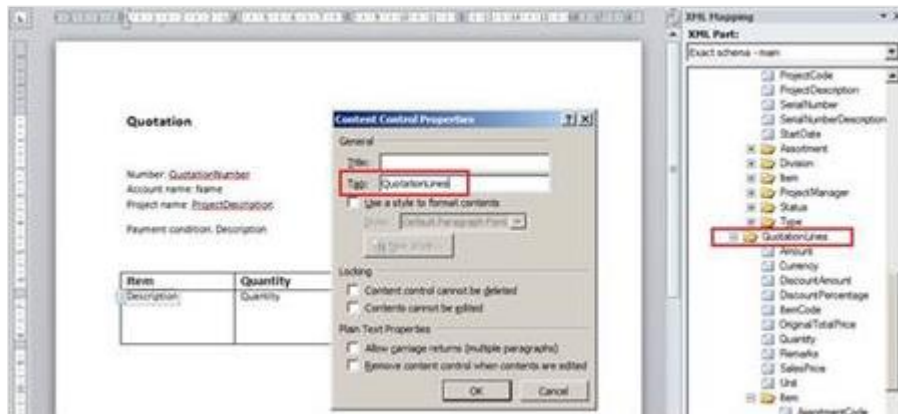
2. This table has two rows. The first row contains the headers and the second row contains the quotation items.
3. Type the header names for the headers in the cells at the first row.
4. Drag and drop the corresponding tags under the **Quotation Lines** node in the **XML Mapping** task pane. You can add pictures as well.



5. Next, you will need to mark repeating content. By marking a row, the **Word Merge** engine will know which data to be repeated.
6. While selecting the first tag in the table, click the **Developer** ribbon and click **Properties**.



7. The **Content Control Properties** page will be displayed. At **Tag**, type "QuotationLines". You must type this in exactly the same case of the folder name in the schema. This means the repeating data comes from the **QuotationLines**, as displayed in the **XML Mapping** task pane.



8. Click **OK**.
9. Save the template. Now the template is ready to be uploaded into Exact Synergy Enterprise to be used during merge process.

Note:

- You can have more than one table with repeating lines in a template, as shown in the following:

Index	Item	Quantity	Price	Picture
1.	Description	Quantity	SalesPrice	Thumbnail

Item	Quantity	Price
Description	Quantity	SalesPrice

- Repeating tables inside other tables are also supported, as shown in the following:

Quotation				Expire Date ExpireDate
Number: QuotationNumber				
Account name: Name				
Project name: ProjectDescription				
Payment condition: Description				
Index	Item	Quantity	Price	Picture
1.	Description	Quantity	SalesPrice	Thumbnail

- You can mark any of columns with repeating tags. It will help to auto-generate columns (like indexes) before the repeating lines, as shown in following:



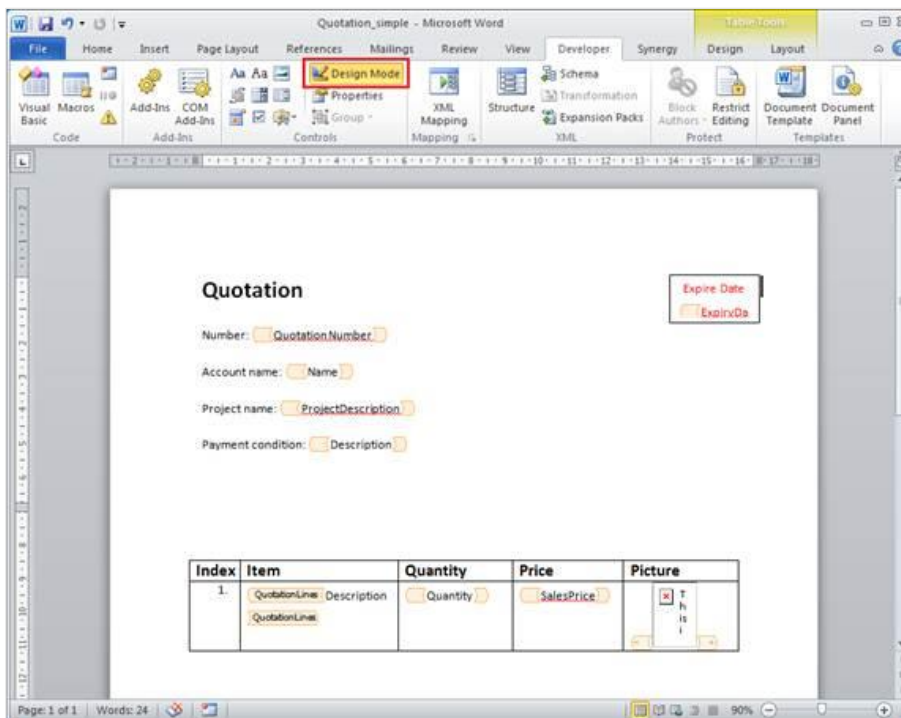
Index	Item	Quantity	Price	Picture
1	Description	Quantity	SalesPrice	 This is a picture

- You can set styles for the tables, rows, or texts within, as shown in the following. The **Word Merge** engine will acknowledge the styles.



Item	Quantity	Price	Picture
Description	Quantity	SalesPrice	 This is a picture

- You can click **Design Mode** under the **Developer** ribbon to have a better overview of your template, as shown in the following:



Generating quotations using Word Merge

Generating quotation processes are now simplified with this new functionality. From product update 250 onwards, you no longer need to select a template on the quotation card. The **Open in MS Word** button has been replaced with **Generate Quotation**.

To perform **Word Merge**, function right **897 – Maintain Word Merge** or **898 – Allow to create Word Merge templates** is required. Users with the **Documents administrator** role have these function rights.

The **Word Merge** engine also supports merging quotation items by adopting the concept of repeating lines. Hence, each quotation can include multiple items.

This section shows you how you can use the **Word Merge** solution to generate quotations. For more information on creating and uploading quotation templates into Exact Synergy Enterprise, see *Creating Word Merge templates for quotations with repeating lines* in this appendix.

To generate quotations using Word merge:

1. Go to Modules → Customers → Reports → Quotations → Search.
2. Select the quotation for which you want to generate its document.
3. On the quotation card, select **Generate Quotation**. A message will be displayed requiring you to select a template from the list of templates assigned for the **Quotation** group, and to which you have access.

Name	Group	Description
Quotation ESE for SME	Quotation	Quotation ESE for SME

4. After selecting the required template, the **Create letter** page will be displayed. By default, under the **Content** section, the **Template**, **Account**, **Project**, and **Quotation number** fields will contain prefilled information.

5. Under the **Header** section, fill in the subject at **Subject** and click **Create letter**.
Note: The **Create letter** page may contain different information, depending on the selected template settings.
6. Exact Synergy Enterprise will start to process your request. Once done, one of following will happen:
 - If **Synergy Office Integration (SOI)** is installed, **SOI** will open the document in Microsoft Word, and Exact Synergy Enterprise will redirect you to create a document; or

- If **Synergy Office Integration (SOI)** is not installed, a message will be displayed requiring you to download the merged document. Click **Open** to open the document after the document is downloaded.

Now, your merged document is ready to be used.

Sending portal messages using Word Merge

With this new functionality, you can define different template groups, such as activation, resetting, and deactivation of password, to be used for both the customer and reseller portals.

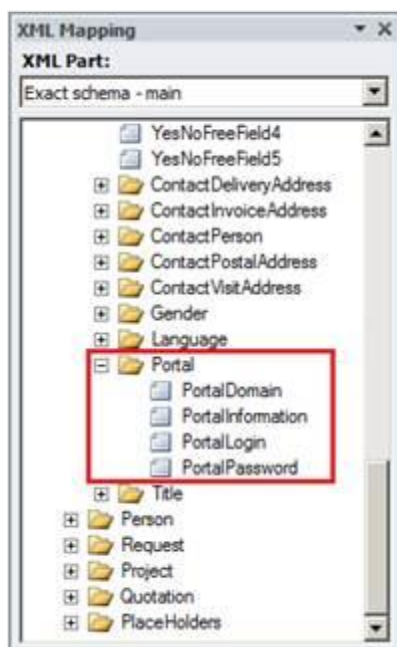
This section describes Portal tags, how to use the latest schemas to create **Word Merge** templates to handle portal messages for customers and resellers, and how to customize the **CRM** settings to use the portal templates to send portal messages. The **Word Merge** templates will be uploaded to Exact Synergy Enterprise and the background job will process the portal messages.

To perform **Word Merge**, function right **897 – Maintain Word Merge** or **898 – Allow to create Word Merge templates** is required. Users with the **Documents administrator** role have these function rights.

What are Portal tags?

The latest Exact Synergy Enterprise general schema contains new tags to handle portal messages. These tags are added in the **Contact** folder in the **XML Mapping** task pane in Microsoft Word documents, and are explained in the following:

- **PortalDomain** — This is the name of domain used by the users during login process.
- **PortalInformation** — This is the information for the customer or reseller portal.
- **PortalLogin** — This is the user name used during login.
- **PortalPassword** — This is the password generated by the system.



Creating Word Merge portal templates

To create Word Merge portal templates:

1. Download the latest version of the **Word Merge** schema, which includes **Portal** tags. For more information, see *Creating Word Merge templates from Word Merge schemas* in this appendix.
2. In the Microsoft Word document, open the downloaded schema in the **XML Mapping** task pane, and expand the **Contact** tag tree to view the **Portal** folder.
3. Start typing some information in Microsoft Word document. The following is an example of a document with portal account activation information:



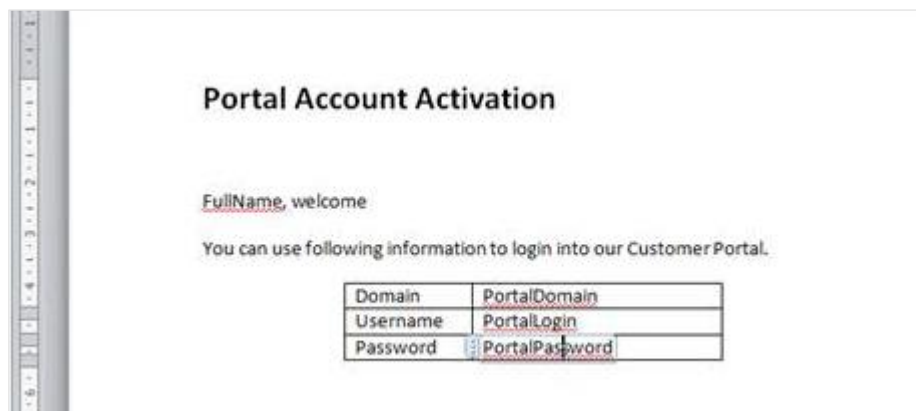
Portal Account Activation

, welcome

You can use following information to login into our Customer Portal.

Domain	
Username	
Password	

4. Expand the **Portal** folder in the **Contact** folder in the **XML Mapping** task pane.
5. Drag the corresponding tags, such as **PortalDomain**, **PortalLogin**, **PortalPassword** and **FullName** from the **XML Mapping** task pane and drop the tags to the related content in the Microsoft Word document. The **FullName** tag is in the **Contact** folder.



Portal Account Activation

FullName, welcome

You can use following information to login into our Customer Portal.

Domain	<u>PortalDomain</u>
Username	<u>PortalLogin</u>
Password	<u>PortalPassword</u>

6. Save the Microsoft Word document with a template name, for example, "Portal.docx".
7. Launch Exact Synergy Enterprise, go to Modules → Documents → Setup → Word Merge → Templates.
8. Click **Template group: New** to create a template group.
9. At **Name**, type "Portal Messages" and select **Account** at **Module**.
10. At **Edit rights**, type or select a function right to be linked to the template group. Only a person with the selected function right will be able to edit the templates under the new group.
11. Click **Save**. Now you can upload your template to this newly created template group.

Note:

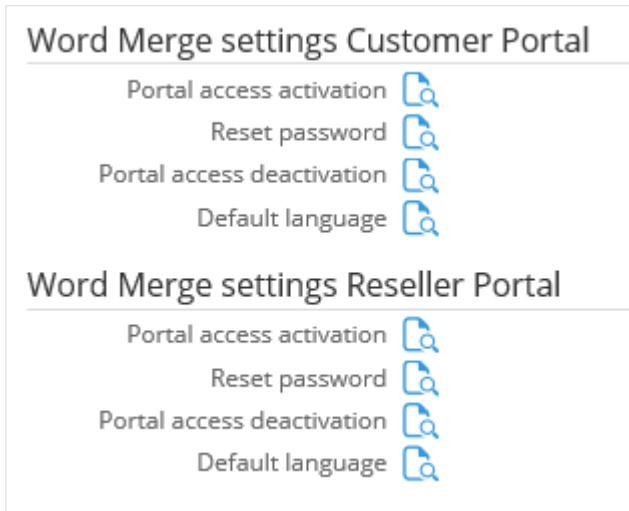
- All fields with the "!" icon are mandatory.
- In portal templates, you can use the **Contact** and **Account** tags. The **Contact** tag folder contains contact information and the **Account** tag folder contains account information of the merging contacts.

Customizing CRM settings for portal templates





The **CRM** settings need to be customized to allow the background job to use your templates to send portal messages, once the template is created and uploaded into Exact Synergy Enterprise.

To customize the CRM settings for portal templates:





1. Launch Exact Synergy Enterprise, go to Modules → Customers → Setup → Other → Settings.
2. On the **Accounts: Settings** page, click **Edit**.



Word Merge settings Customer Portal

- Portal access activation 
- Reset password 
- Portal access deactivation 
- Default language 

Word Merge settings Reseller Portal

- Portal access activation 
- Reset password 
- Portal access deactivation 
- Default language 

3. Select a template group for the required portal message options under the **Word Merge settings Customer Portal** and **Word Merge settings Reseller Portal** sections. You can select different groups for each section, or select a single group for more than one message.
4. Select the default language for the portal messages at **Default language**.
5. Click **Save**.

Note:

- When you run the background job, Exact Synergy Enterprise uses the **Word Merge** templates to send portal messages. If you leave the settings blank, Exact Synergy Enterprise will use a pre-defined template to send these messages.
- When the **Language** setting in the **Word Merge** template groups is blank, the selected language at **Language** on the contact card will be selected as the pre-defined language. Otherwise, Exact Synergy Enterprise will use a predefined language, match this to the template, to send portal messages.

APPENDIX G: SETTING UP PERSONAL DATA CLASSIFICATIONS TO PROTECT PERSONAL DATA

The personal data classification feature is introduced to support the General Data Protection Regulation (GDPR) or any other similar regulations that may be enforced in other countries to protect the data of individuals. The setup and maintenance of personal data classifications are required to support the proper management of personal data.

With this, you can enable the setting of expiry dates for personal data so that those data are anonymized when they are no longer applicable. This is useful in cases where an employee has resigned from the company, a lead account is not promoted to the customer account, or an applicant is not hired.

Setting up personal data classifications

Firstly, you have to set up personal data classifications. These classifications allow you to classify entities, such as employees, contact people, and accounts. You can then define the events to indicate when the entities are no longer relevant or needed in the system. These classifications allow you to define the retention period based on the events and the actions to be taken on the personal data that are no longer relevant, which include the deletion of those data.

To create and maintain personal data classifications, and view the listing of existing personal data classifications, function right **1029 — Personal data management** is required. Users with the **Personal data controller** role have this function right.

To create personal data classifications:

1. Go to Modules → System → Setup → Personal data → Classification.
2. Click **New**. You will see the following page:

System: Classification 📄 ★ ?

✕ Close Save Save + New

Code ⚠

Description ⚠

Status Active ▼

Conditions Master data Documents Requests Persons

☒ Employee Type Applicant ▼

Category ☐ Contact person

☐ Account

Link automatically ☐

Event Inactive status ▼

Expiry period after event

☒ Days

Time scale ☐ Months

☐ Years

3. At **Code** and **Description**, type the code and description of the personal data classification respectively.
4. In the **Conditions** tab at **Category**, select **Employee**, **Contact person**, or **Account** to specify to whom this classification applies.
5. At **Type**, select the type to separate the classifications according to the types available for the category. This is available only if **Employee** or **Account** is selected at the **Category** field.
6. Select the **Link automatically** check box to automatically link this classification to newly-created or modified entries of people who meet the conditions of this classification.
7. At **Event**, select an event to indicate when the personal data of your employees, contact people, or accounts are no longer needed, and can be deleted from the system. You can select **Inactive status** or **Contract terminated** if **Employee** is selected at the **Category** field. **Contract terminated** is available only if **Employee** is selected at the **Category** field.
8. At **Expiry period after event**, type a number to specify the duration that the data will be retained after the event occurs.
9. At **Time scale**, select **Days**, **Months**, or **Years** to indicate the time scale, which correlates with the number defined at the **Expiry period after event** field.
10. In the **Master data** tab, select the master data to be anonymized when the event occurs after the defined period. The master data available for selection depends on the option selected at the **Category** field. Note that this is only applicable if you were to anonymize one person or more. The merging or deletion of a person action is not applicable.
11. In the **Documents** tab, select the document types to indicate the documents to be deleted. When the event occurs after the defined period, the documents belonging to the document types and that are linked to the people or category defined will be deleted. Note that if you were to delete an entry of a person, all documents linked to the person will be deleted as well regardless of the selections made in this tab.
12. In the **Requests** tab, select the request types to indicate the requests to be deleted. When the event occurs after the defined period, the requests belonging to the request types and that are linked to the people or category defined will be deleted. Note that if you were to delete an entry of a person, all requests linked to the person will be deleted as well regardless of the selections made in this tab.
13. In the **Persons** tab, select the people to be linked to this classification. The people available for selection depends on the options selected at the **Category** and **Type** fields.
14. Click **Save**.

Link personal data classifications to employees, contact people, and accounts

You can automatically or manually link existing personal data classifications to employees, contact people, and/or accounts.

Automatically linking personal data classifications to employees, contact people, and accounts

When creating or modifying a personal data classification, ensure that the **Link automatically** check box is selected.

System: Classification 📄 ★ ?

[Close](#) [Save](#) [Save + New](#)

Code ⚠️

Description ⚠️

Status Active ▼

[Conditions](#) [Master data](#) [Documents](#) [Requests](#) [Persons](#)

☒ Employee Type Applicant ▼

Category ☐ Contact person

☐ Account

Link automatically ☐

Event Inactive status ▼

Expiry period after event

☒ Days

Time scale ☐ Months

☐ Years

By selecting this check box, you can have this classification to be automatically linked to all newly-created or modified entries of people who meet the conditions of the classification.

Note:

This method is only recommended if you want to link an existing personal data classification to newly-created entries of people or modified ones that meet the conditions of the classification. For existing entries that have not been modified, the linking will not occur even if these entries meet the conditions of the classification.

Manually linking personal data classifications to employees, contact people, and accounts

You can also manually link existing personal data classifications to employees, contact people, and/or accounts via their respective cards.

The following are steps on linking an existing personal data classification to an employee. The steps are similar for a contact person or an account, except that the starting point will be at the contact or account card.

1. Go to Modules → HRM → Reports → People → People.
2. Define the required criteria to display employees who match the criteria.
3. Click the hyperlink in the **Name** column to display the respective personal card.

HRM: Person

Close Edit Create letter Create email vCard ➔

Created by 20-09-2011 17:07
Modified by Dan Brands 20-12-2017 15:32

Dan Brands - 1
[View person's timeline](#)

Job title [CEO](#)
Division [001 — Deltabike Holding N.V.](#)
Mobile / Mobile extension
Office phone / Extension
E-mail dan.brands@exact.com

Accounts
Documents (Recent)
Projects
Workflow

Calendar
Items
Dossier
Reports

Documents
Planning
Transactions
Personal data

General
Status [Active \(7 Years 3 Months\), 1.00 FTE](#)
Time [04-12-2018 11:19](#)
Action: Last [04-12-2018 11:19 \(0 Minutes\)](#)
Physical location
Contractual location
Room

Organisation
Manager
Assistant
Subordinates [88](#)
Security level [15](#)
Job group [General & Management](#)
Job activity [Holding General](#)
Focus

4. Click the **Personal data** hyperlink. The **System: Classifications** page will be displayed.
5. Click **Add**.

System: Classifications

Close Save

Person [1 — Dan Brands](#)
Classification

6. At **Classification**, click . The **Personal data classifications** pop-up page will be displayed.

Personal data classifications

Close Refresh Add

Code
Link automatically
Category

Description
Status

Page size Show

<input type="checkbox"/>	Code ▲▼	Description ▲▼	Link automatically	Status	Category	Type	Event	Expiry period	Time scale
<input type="checkbox"/>	ClasD	ClasD	No	Active	Employee	Employee	Inactive status	1	Days

7. Select the check box(es) of the personal data classification(s) to link the selected classification(s) to the employee, and then click **Add**.
8. Click **Close**.
9. Click **Save**. The personal data classification(s) will be linked to the employee, as displayed in the following:

System: Classifications (-)

[Close](#)[Add](#)[Delete](#)Page size [Show](#)

<input type="checkbox"/>	Code	Description	Status	Category	Type	Event	Expiry period	Time scale	Link automatically
<input type="checkbox"/>	ClasD	ClasD	Active	Employee	Employee	Inactive status	1	Days	No
<input type="checkbox"/>	ClasE	ClasE	Active	Employee	Employee	Inactive status	1	Days	No

Anonymizing data

The action center for personal data classifications is an overview that displays events linked to the personal data classifications, whether the events have taken place, and the number of people or accounts linked to the events. An event indicates the conditions when the personal data of your employees, contact people, and accounts are no longer needed, and can be manually anonymized.

From the action center, you can zoom in on a personal data classification by clicking the hyperlink in the **Total linked: Persons** column. When zooming in on a classification, you will be able to see whether the event has taken place for the linked employees, contact people, or accounts, whether the expiry period has reached (depending on the inactive date, time scale, and current date), as well as the proposed action.

To access the action center for the classifications, function right **1029 — Personal data management** is required. Users with the **Personal data controller** role have this function right.

To anonymize data:

1. Go to Modules → System → Setup → Personal data → Selections / Actions.

Personal data: Selections / Actions

[Close](#)[Refresh](#)[Reset](#)

Criteria

Code	<input type="text"/>	Include: Inactive	<input type="checkbox"/>
Description	<input type="text"/>	Event occurred	<input type="checkbox"/>
Category	<input type="text" value="Employee"/>	Expiry period reached	<input type="checkbox"/>

Classification code	Description	Status	Category	Type	Event	Expiry period	Time scale	Total linked: Persons	Total: Event occurred	Total: Expiry period reached
ClasA	ClasA	Active	Employee	Applicant	Contract terminated	60	Days	2	0	0
ClasD	ClasD	Active	Employee	Employee	Inactive status	1	Days	9	0	0
ClasE	ClasE	Active	Employee	Employee	Inactive status	1	Days	4	1	1

Page size [Show](#)

2. Under the **Criteria** section, define the filter criteria to display the required results.

- Click the hyperlink in the **Total linked: Persons** column to view the employees, contact people, or accounts that are linked to the respective classification.

Personal data: Selections / Actions



[Close](#) [Refresh](#) [Reset](#) [Anonymize](#) [Create letter](#)

Criteria

Event occurred ☐
Person

Expiry period reached ☐

Page size [Show](#)

<input type="checkbox"/>	Classification code	Description	Category	Type	Event	Expiry period	Time scale	Employee number	Employee name	Event occurred	Expiry period reached	Proposed action
<input type="checkbox"/>	ClasE	ClasE	Employee	Employee	Inactive status	1	Days	1	Dan Brands	✗	✗	None
<input type="checkbox"/>	ClasE	ClasE	Employee	Employee	Inactive status	1	Days	1000	Nico Cremers	✗	✗	None
<input type="checkbox"/>	ClasE	ClasE	Employee	Employee	Inactive status	1	Days	1006	Sanne Klein	✗	✗	None
<input type="checkbox"/>	ClasE	ClasE	Employee	Employee	Inactive status	1	Days	1058	Angel Chan	✓	✓	Process

- Select the relevant check box(es) to anonymize the respective employees, contact people, or accounts.

Note:

- In the **Event occurred** column, a green check mark indicates that the event has occurred for the employee, contact person, or account. A red cross indicates that the event has yet to occur.
- In the **Expiry period reached** column, a green check mark indicates that the retention period is equal to the current date or has passed the current date, while a red cross indicates that the retention period has not passed the current date.
- In the **Proposed action** column, if the retention period has not passed the current date, "None" is displayed to indicate that no action needs to be taken. If the retention period is equal to the current date or has passed the current date, "Proposed" is displayed in this column to indicate that you can anonymize the relevant personal data.

- Click **Anonymize**.
- In the pop-up page displayed, type the password. As the action is irreversible, a password is required to proceed with the action. The password can be obtained from your customer support.
- Click **Submit**.

Note:

When you anonymize an employee, the creditor or debtor account (including the contact people) linked to the employee will also be anonymized.

APPENDIX H: PRODUCT UPDATE CHANGES

Product Update	Chapter
262	Appendix G
257	6.2, 6.3, 6.4, 6.5, Appendix C
256	Screens changed in chapters 3, 4, 6, 7, and Appendix B
250	All chapters
251	3.6.1, 5.1.1, Appendix G
252	3.4.1, 6.2, 6.3.1, 6.4, 6.5.3, Appendix G
253	3.6.2
255	All chapters (screens changed)