CRM – Customer Relationship Management

Customer Relationship Management is identifying, developing and retaining profitable customers to build lasting relationships and long-term financial success.

The agrē CRM module allows you to setup custom attributes (additional fields on the customer account that you define), track customer activities (reminders are optional), and store customer documents.

What you'll find:

What is Customer Relationship Management?

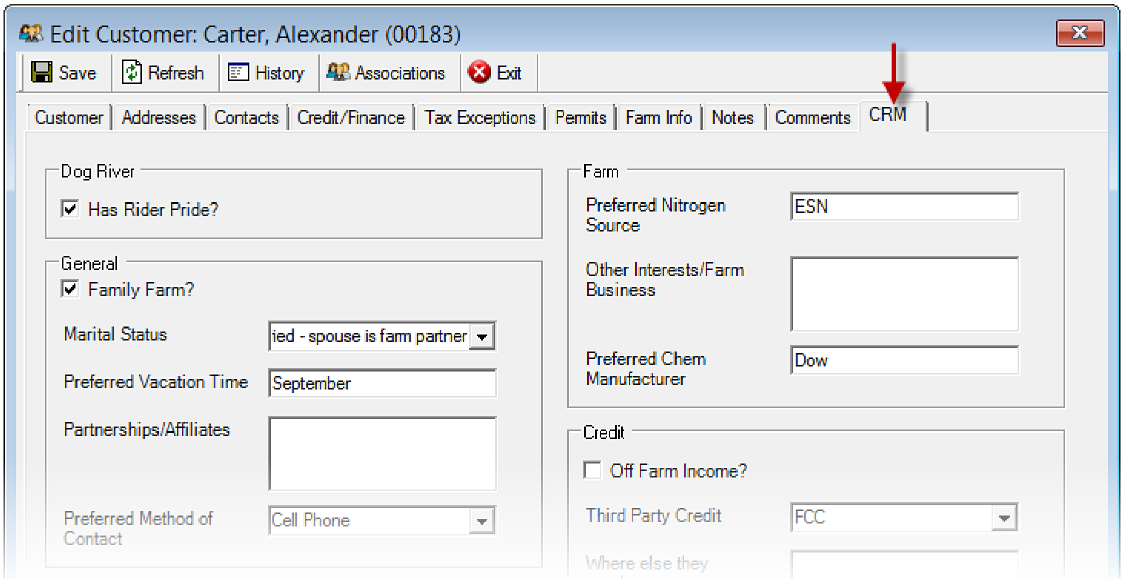
CRM is based on the idea that the better you know your customers, the better you can serve them and the more successful your business will be.

The agrē CRM module is comprised of the following components:

1) Custom Attributes
2) CRM Activities
3) Document Manager

Custom Attributes

If you've ever said "I wish there was a field on the customer account form for …" you're going to love custom attributes. ***Custom Attributes*** are like customer characteristics in that you manage them yourself, but they are much more flexible.



Want to know which of your customers use FCC or other third party credit or which chemicals they prefer to use? Create an attribute for it! Want to track their wife and kids' names? Create an attribute for that too! Whatever kinds of information you want to keep track of, CRM ***Custom Attributes*** will help make it easy.

Before you create the individual attribute fields to store information, you'll create groups to keep like items together. **Attribute groups** can be common to all customers, or restricted to those of one location.

Although ***Custom Attributes*** are controlled and customized by you, we give you three attribute groups (types of information) to get you started. Within these groups are a few typical custom attributes that you may want to use. These default attributes are just suggestions – you can easily choose to remove or edit them and you can add more groups and attributes as needed.

Setting up Custom Attribute Groups

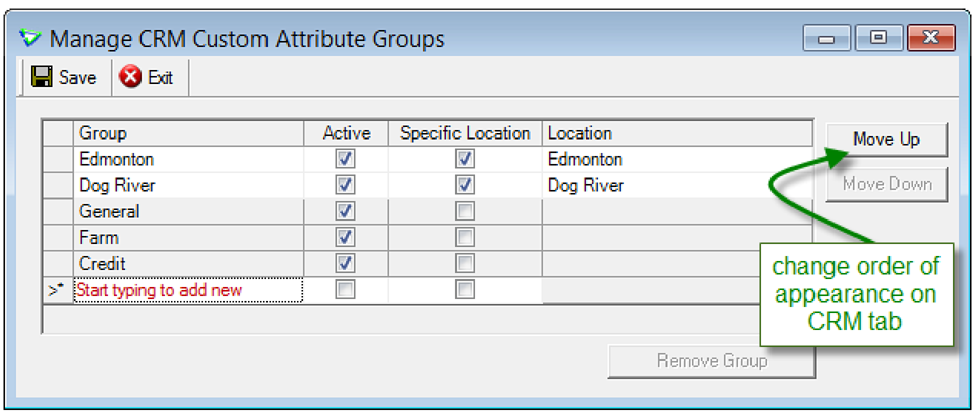
Think of groups as being like a folder or container for attributes. You can't create a custom attribute until you have a group to put it in. Attribute Groups don't *do* anything on their own; they just store similar attributes together for easier data entry and viewing.

Navigate to ***Accounts Receivable > CRM > Manage > Custom Attribute Groups***.

Adding an Attribute Group

In the list are the three default groups: ***General***, ***Credit***, and ***Farm***. These default groups cannot be edited, deactivated, or removed but you don't have to use them if you don't need them. Once you remove all attributes from a group, or deactivate it, it will no longer display on the customer account CRM tab.

To add a new group, start typing its description on the blank line at the bottom of the list and press TAB to make the group ***Active***. If the group is for customers of one location only, check the box and select it.



If you're adding multiple groups, add them all at once as ***Save*** closes the window.

The **order** of the groups in the list determines the order and the position of the groups on the two-column customer account ***CRM tab***. If there are an odd number of groups, there will be one more group on the left hand side of the tab than on the right. Click ***Move Up*** or ***Move Down*** to change the order of the groups. ***Save*** your changes.

Caution	It's very easy to click ***Exit*** instead of ***Save*** and accidentally discard your changes!

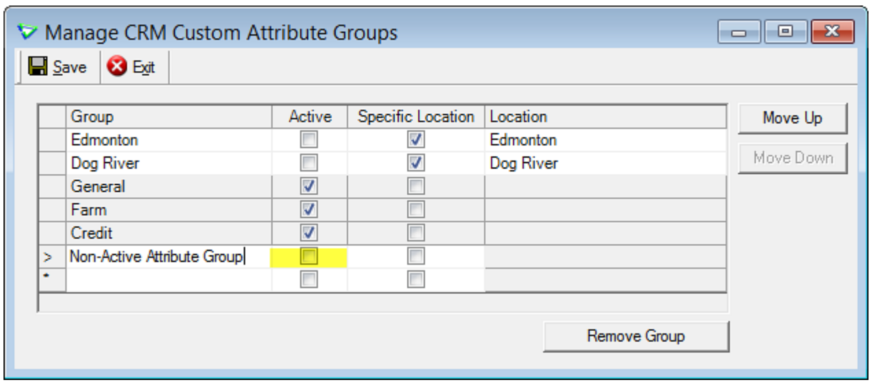
Editing an Attribute Group

To **change the spelling** of a group, double-click on the group title and type a new one.

To **deactivate** an attribute group (the group and its attributes will no longer display on the customer account ***CRM tab***) click on the checkmark in the ***Active*** column to remove it. You can deactivate a group even if it contains active attributes. ***Save*** your changes.

To make a group **location-specific**, check the ***Specific Location*** box and choose the location. Any previously entered data for customers not from that location is retained (and will be included in the CRM Export) but won't be visible on the CRM tab.

To make a group **universal**, uncheck the ***Specific Location*** box (which removes the location).



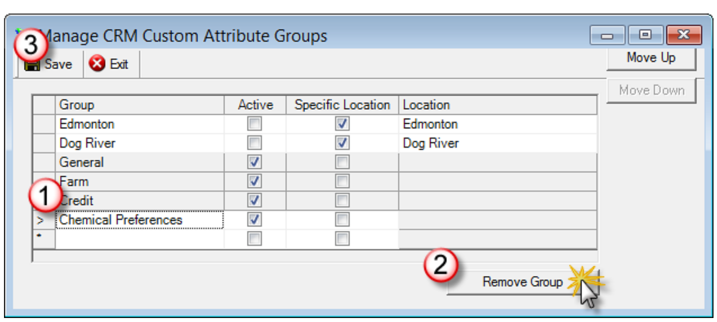
Note ***Attribute Groups*** can be deactivated even if they contain active ***Custom Attributes***.

Removing Attribute Groups

If an attribute group is empty it can be permanently removed. If it contains attributes, you would need to remove them before the group could be removed.

Note You can also deactivate an attribute group instead of removing it permanently. Deactivated groups do not appear on the ***CRM tab***.

Select the group to remove and click ***Remove Group***. ***Save*** your changes.

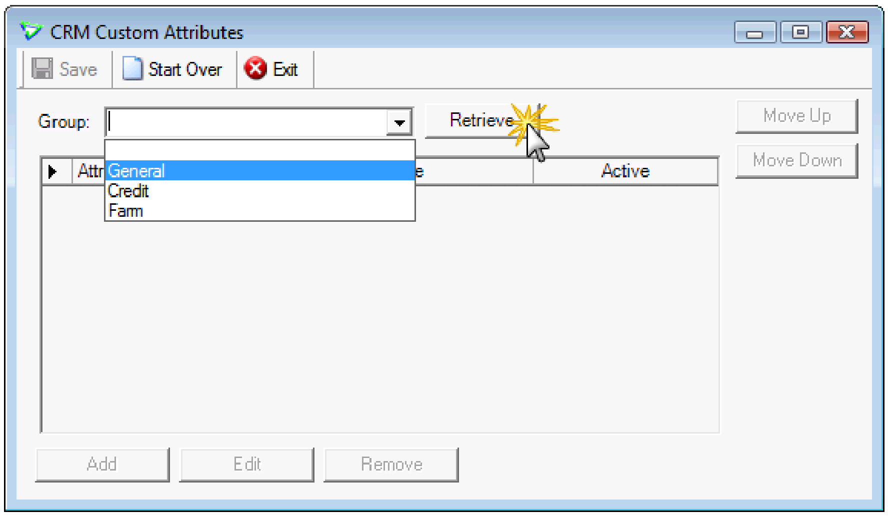


Setting up Custom Attributes

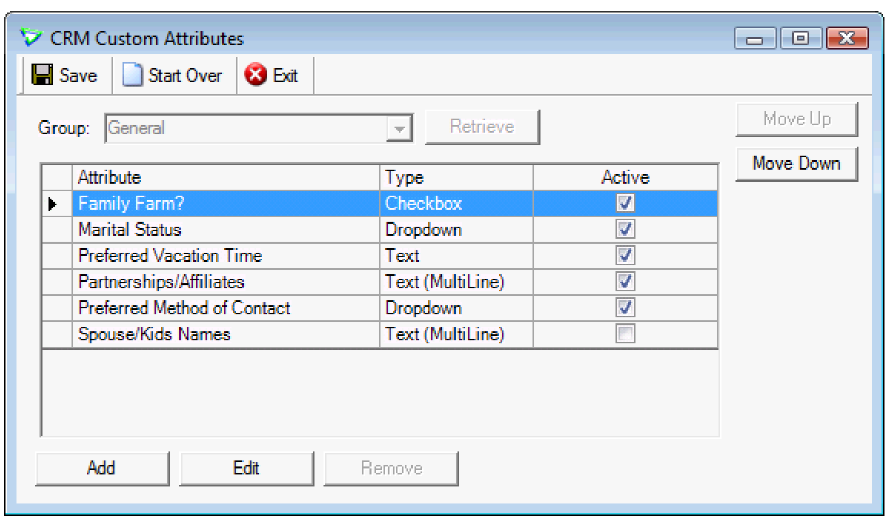
Custom Attributes are the individual data items you want to store. Custom Attributes are combined into groups so agrē knows how to display them on the customer account ***CRM tab***.

Navigate to ***Accounts Receivable > CRM > Manage > Custom Attributes***.

Custom Attributes are managed within their ***Group***. Select a group and click ***Retrieve***.



A list of the custom attributes contained in this group is shown.



Adding Custom Attributes

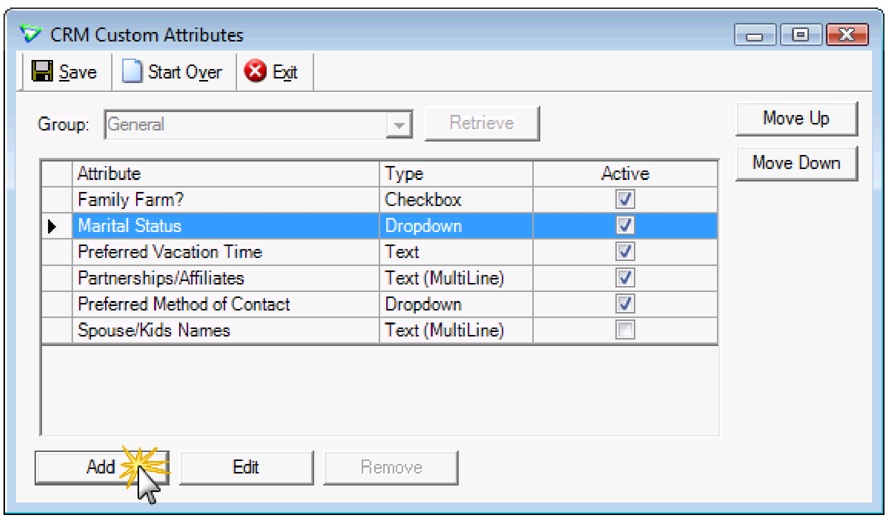
An attribute name must be unique within its own group, but attributes with the same name can be included in multiple groups.

Custom Attributes come in 4 varieties:

1. text box
2. multi-line text box
3. check box
4. dropdown list

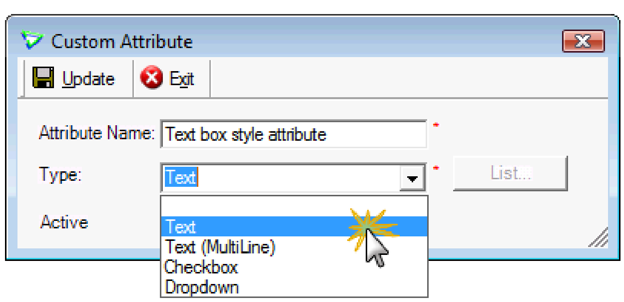
For All Attribute Types:

Click ***Add***.

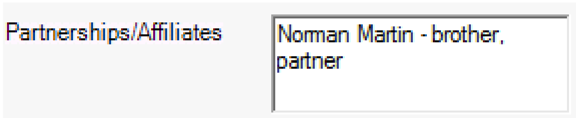


Adding a Text Box

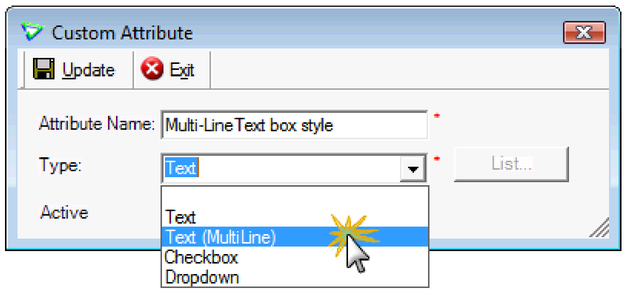
Type the attribute name. Select ***Text*** as the attribute type. Click ***Update***.



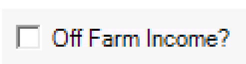
Adding a Multi-line Text Box



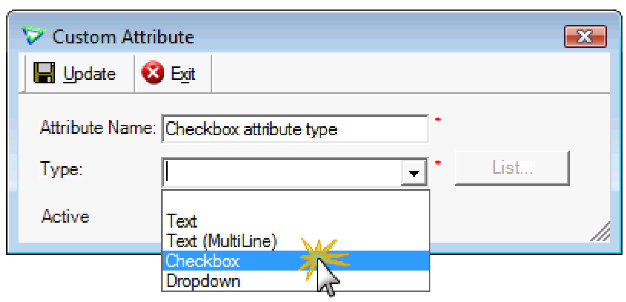
Type the attribute name. Select ***Text (Multiline)*** as the attribute type. Click ***Update***.



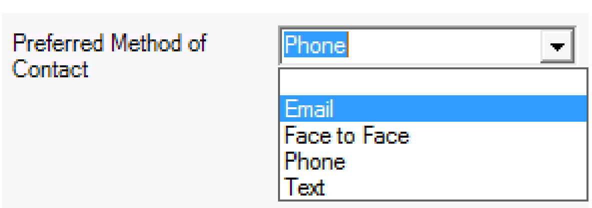
Adding a Check Box



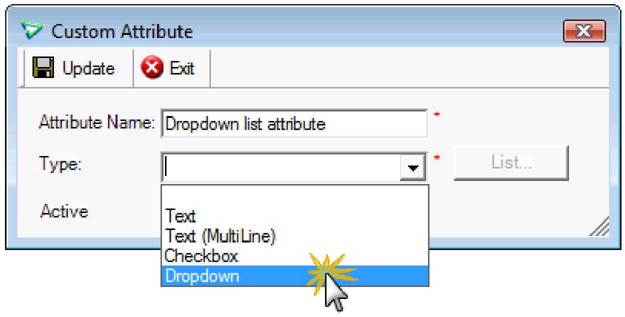
Type the attribute name. Select ***Checkbox*** as the attribute type. Click ***Update***.



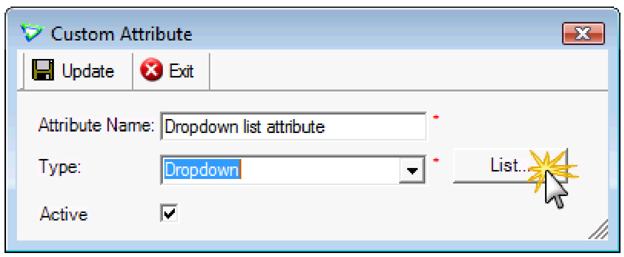
Adding a Dropdown List



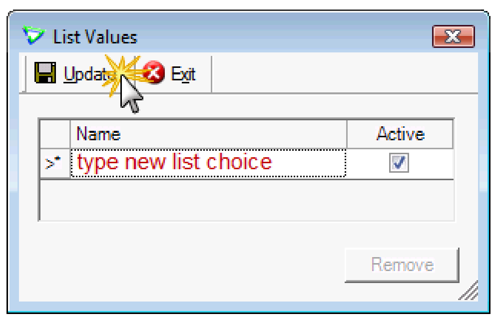
Type the attribute name. Select ***Dropdown*** as the attribute type.



Click ***List.***

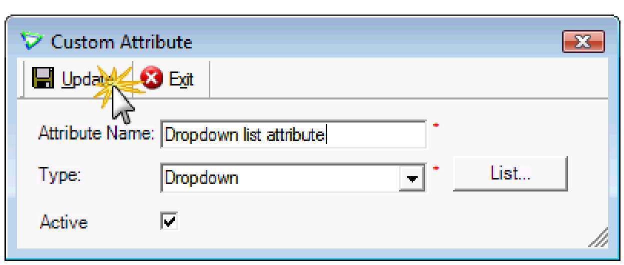


Type the values you want to appear in the dropdown list and press **TAB** to activate. Click ***Update*** to save the list values.



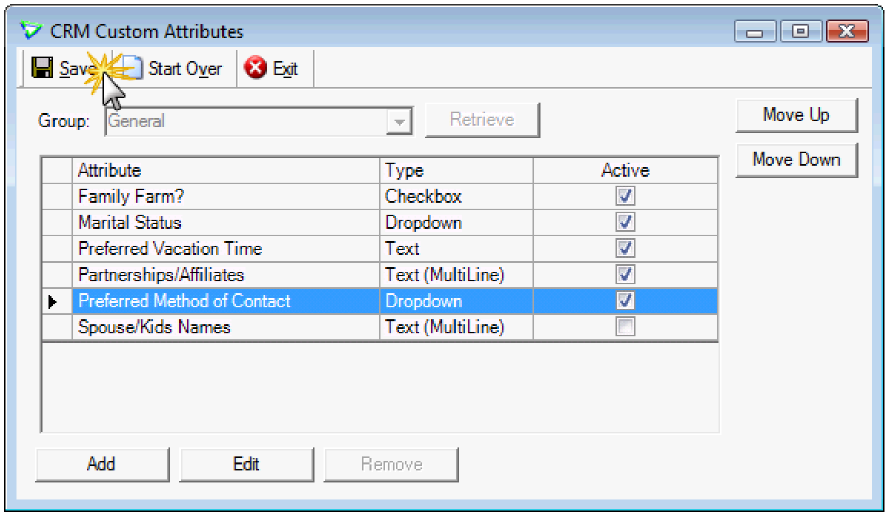
Note	The list values will be automatically sorted in alphabetical order after you ***Update***.

Click ***Update*** to save the dropdown attribute.



For All Attribute Types

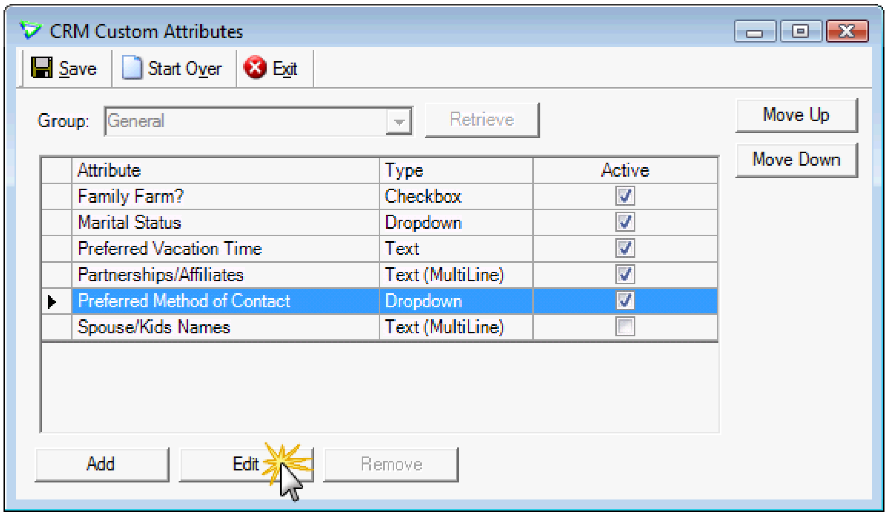
Save your changes.



Editing Custom Attributes

Editing attributes is very similar to adding them. It may take less time to edit and customize a default attribute than removing it and creating a new one.

Select the attribute you want to change and click ***Edit***.

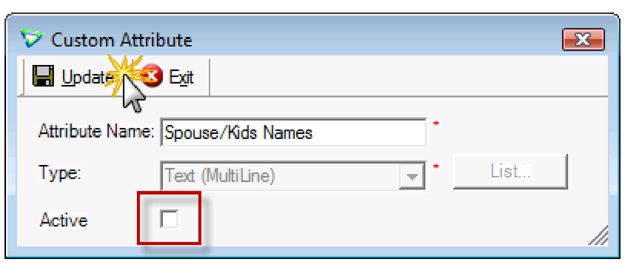


Changing an Attribute Name

Change the attribute name by typing new text. This changes only the text label. Existing data (information specified in the customer account) will not be affected. ***Update*** to save the change.

Deactivating Custom Attributes

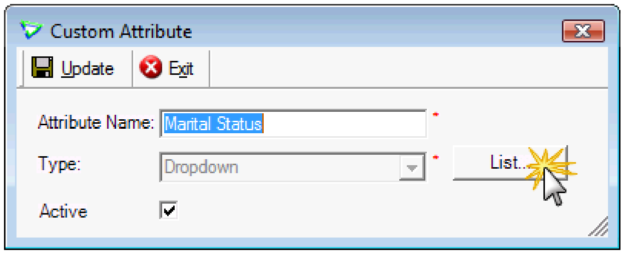
Click on the ***Active*** checkbox to remove the checkmark. ***Update*** to save the change.



Note	Deactivated attributes will not display on the customer account ***CRM tab***.

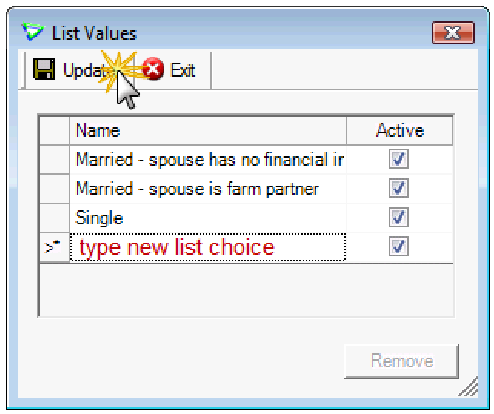
Editing Dropdown List Choices

Click ***List***.



To **change the spelling** of an existing value, double-click and type new text. This changes existing data (information specified in the customer account). ***Update*** to save the change.

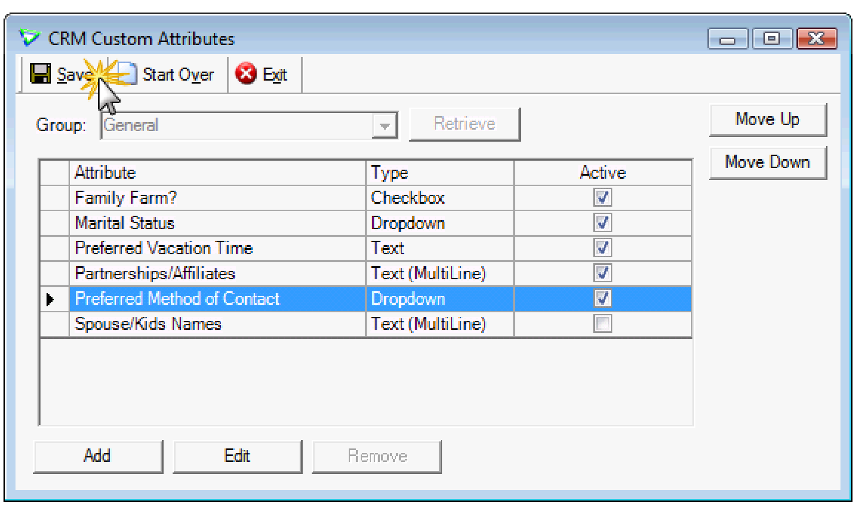
To **add a value** to the list, type a new title and press TAB. ***Update*** to save your changes.



Note The list values will be sorted in alphabetical order after you ***Update***.

For All Custom Attributes

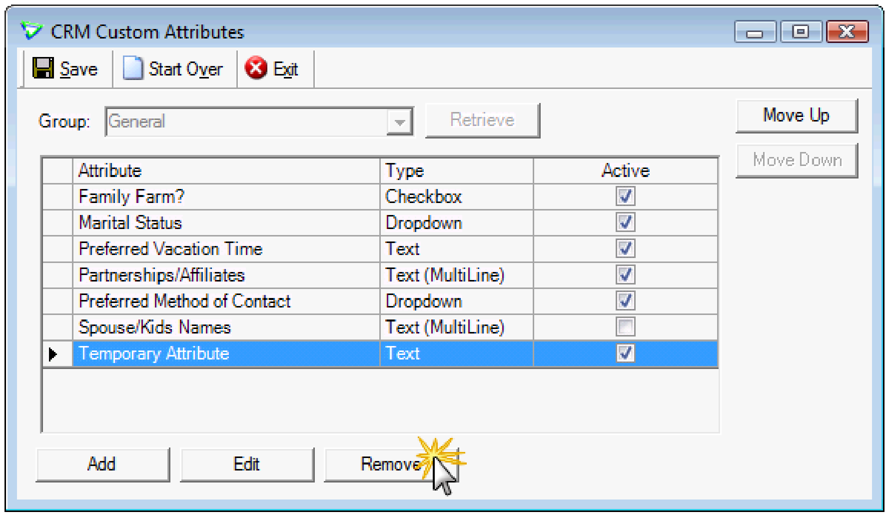
Save your changes.



Removing Custom Attributes

If an attribute is not in use it can be permanently removed from the group. If it has been used, you would need to edit every customer account with data in that attribute and clear it before the attribute could be removed.

Select the attribute and click ***Remove***. ***Save*** your changes.



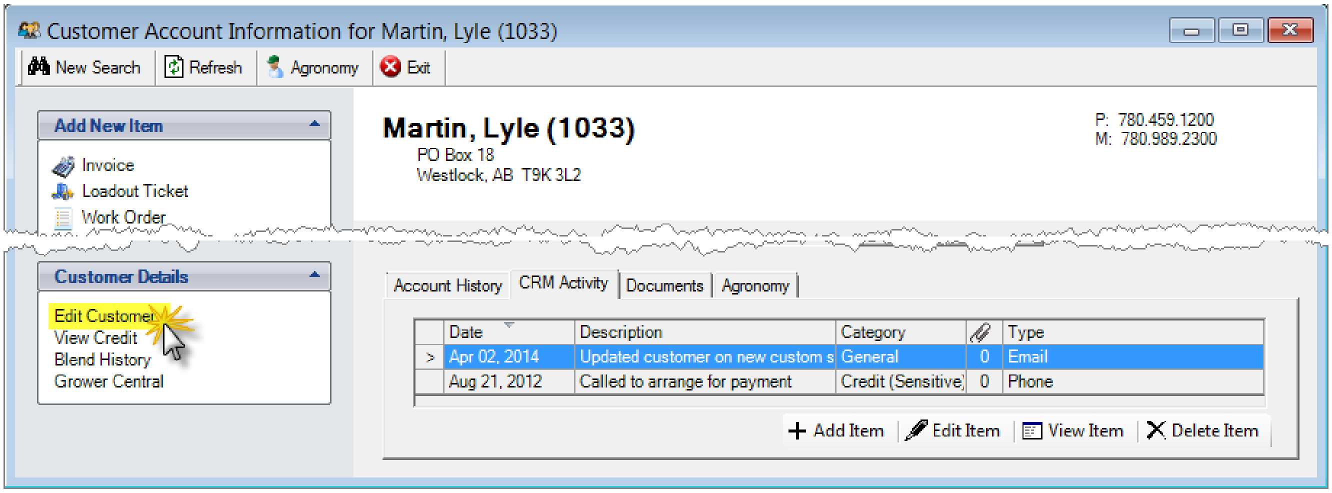
Tips

You could also deactivate an attribute instead of removing it permanently. This may be a quicker option if it is currently in use, but you no longer need it.

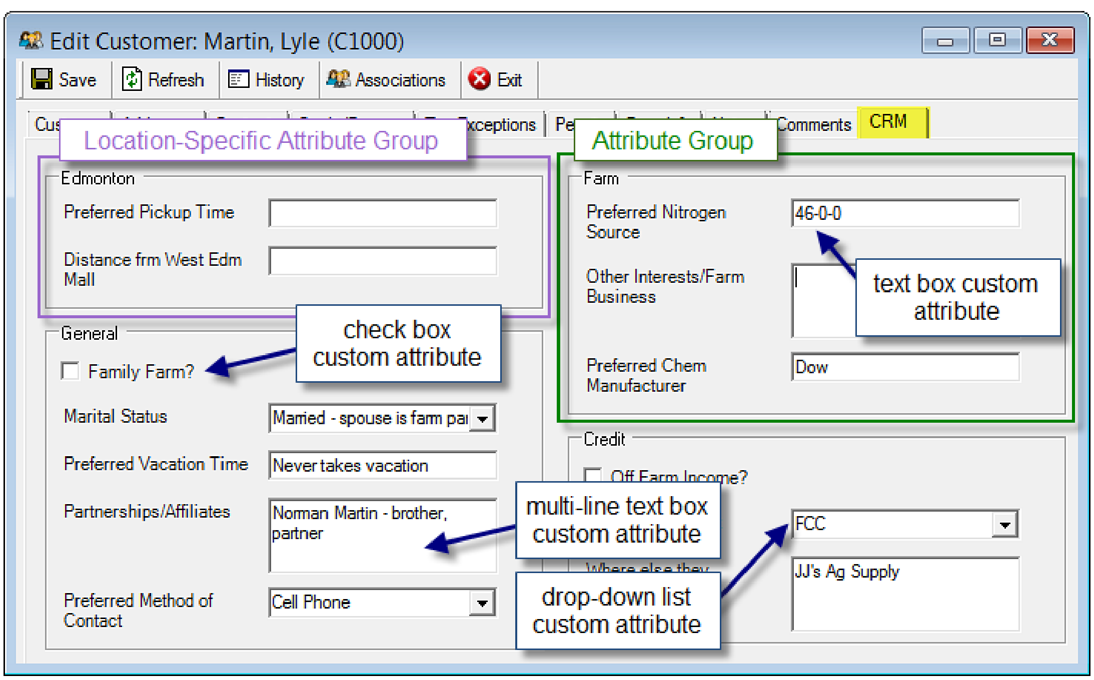
The ***CRM Custom Attributes export*** will identify which customers are associated with particular attribute.

Using Custom Attribute Information on a Customer Account

Once your custom attributes are setup, data entry will be done via the ***customer account CRM tab.***



or edit via Accounts Receivable > Manage > Customer



Custom Attribute Data Exports

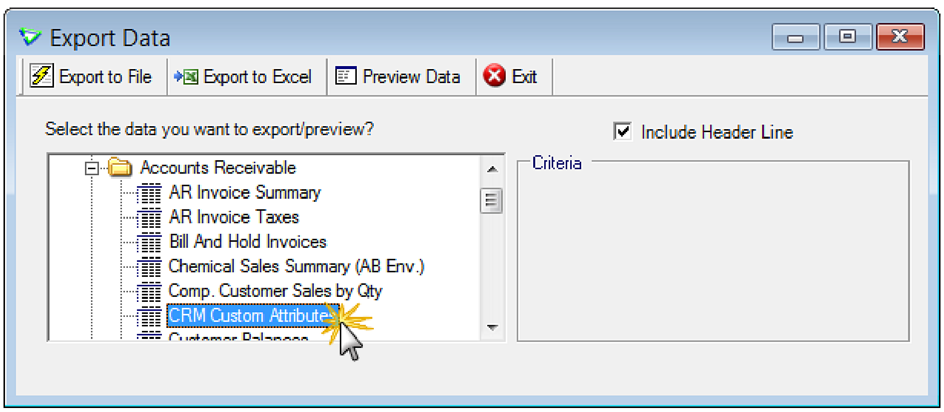
To use the custom attribute information in other applications, export the data from agrē.

Navigate to ***File > Exports > Data***.

Help	Refer to online Help for more detailed instructions on exporting data.

CRM Attribute Export

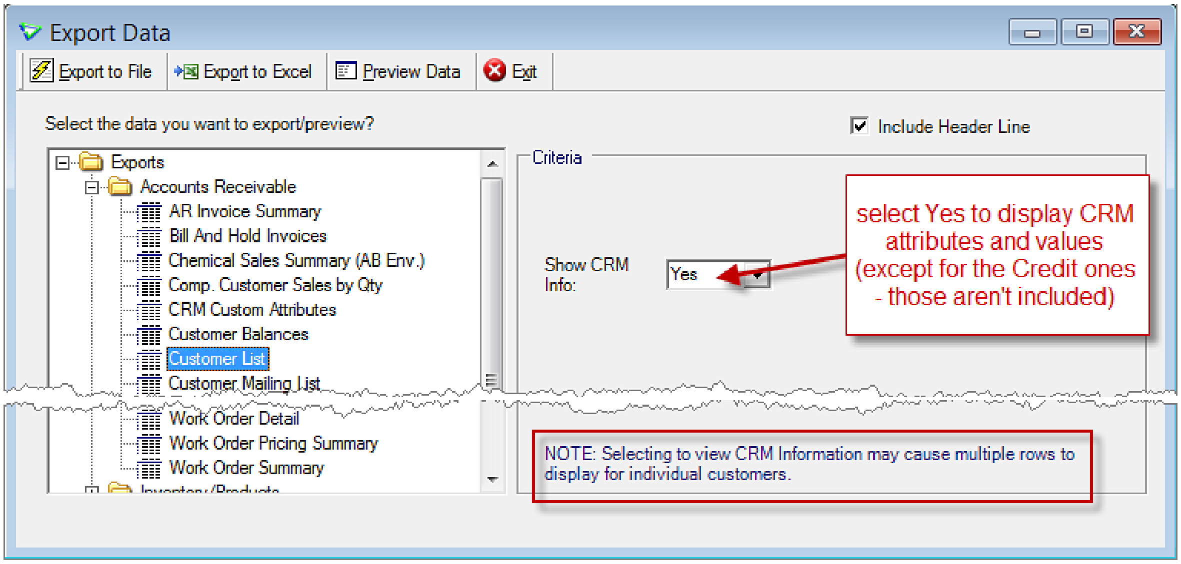
Choose ***CRM Custom Attributes*** from the dropdown list.



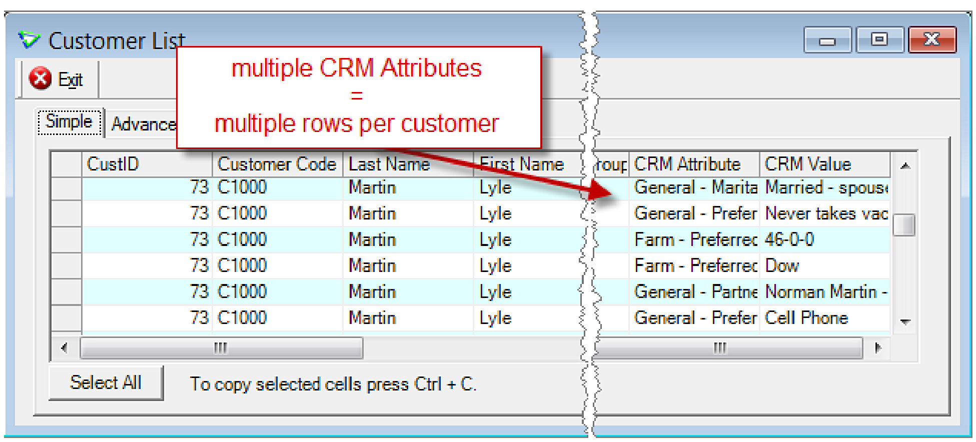
Export to a text file or an Excel file as you would any other data export.

Customer List Export

The ***Customer List*** can also include CRM Attribute and CRM Value information.



When choosing to **Show CRM Info**, if a customer has multiple CRM Attributes the export will include multiple rows for that customer.



Note ***Credit*** attributes and values are secured and are *not* included in the Customer List export.

CRM Activities

CRM Activities are used to record customer interactions. Called a grower and want to record the details of your conversation? Create a CRM Activity for it. A customer called you with questions? Write them down in a CRM Activity and set a Reminder to call them back. Been trying to collect from a customer for months and need to pass on what you've done so far to your lawyer? We've already created a special category for Credit (Sensitive) activities with separate security for that.

Once you've decided on the types of interactions you want to track (phone calls, emails, farm visits) you'll decide how you want to group similar activities together into categories.

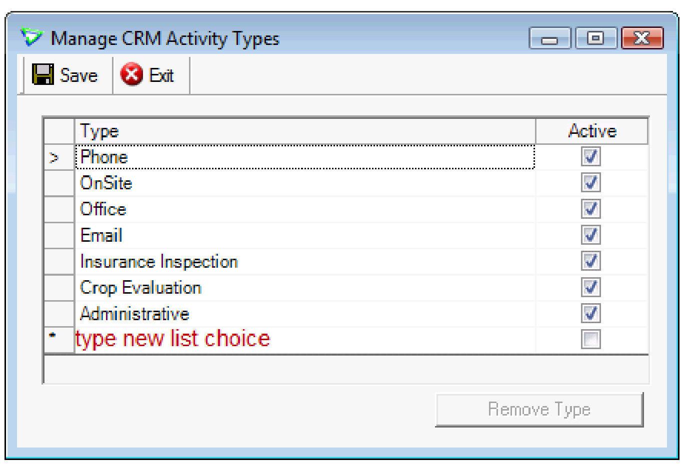
Setting Up CRM Activity Types

CRM Activity Types are the kinds of interactions you have with your customers: phone calls, emails, on-farm visits, etc. We get you started with a few typical types, but you can setup as many as you need.

Navigate to ***Accounts Receivable > CRM > Manage > Activity Types***.

Adding a CRM Activity Type

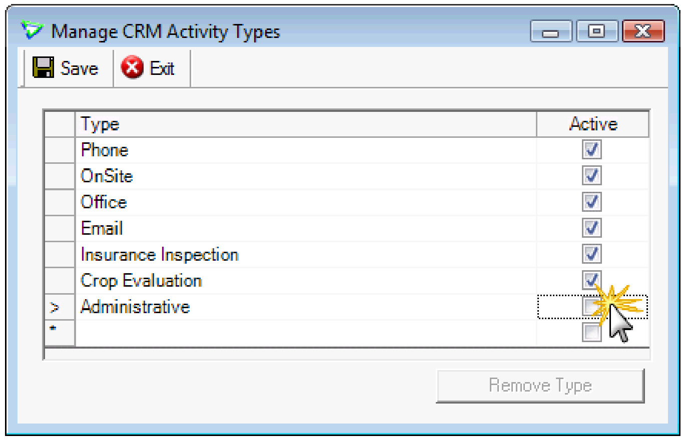
Type a text label in the blank line at the bottom of the list and press **TAB** to activate. ***Save*** your changes.



Editing a CRM Activity Type

To **change the spelling** of a type, double-click on the title and change the text. ***Save*** your changes.

To **deactivate** a type, click on the checkmark in the ***Active*** column to remove it. ***Save*** your changes.

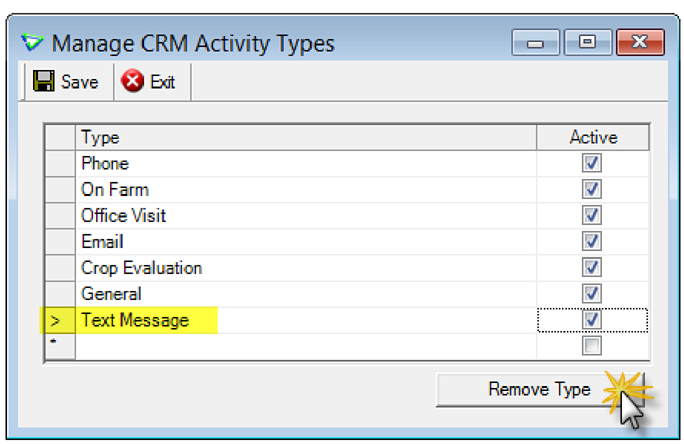


Removing a CRM Activity Type

If a type is not in use it can be permanently removed. If it has been used, you would need to edit every CRM Activity that used that type and select a different one (or delete the activity) before the type could be removed.

Tip You could also deactivate a type instead of removing it permanently. This may be a quicker option if it is currently in use, but you no longer need it.

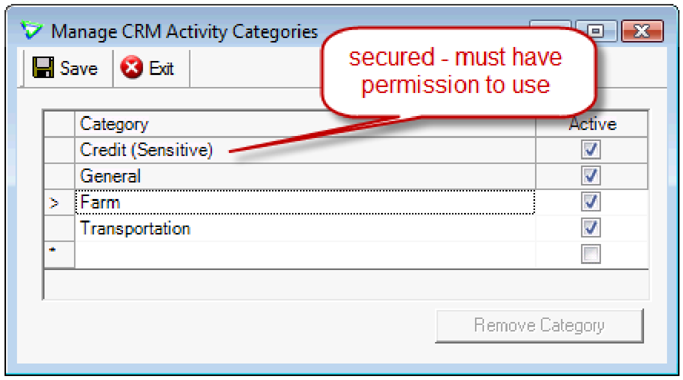
Select the type and click ***Remove***. ***Save*** your changes.



Setting Up CRM Activity Categories

Categories are for grouping similar activities together. We give you a couple of generic categories to get you started. These default categories cannot be renamed, removed or deactivated.

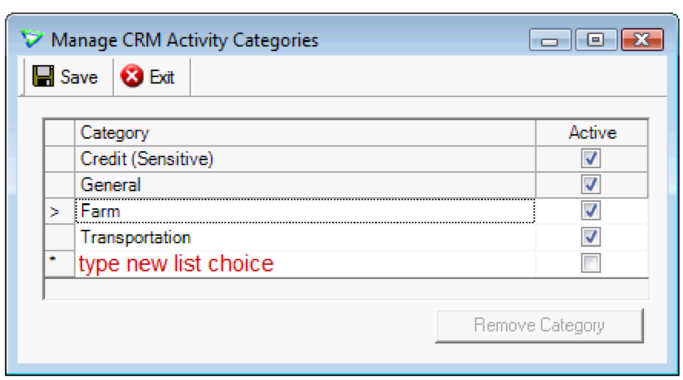
Navigate to ***Accounts Receivable > CRM > Manage > Activity Categories***.



Note	Because perhaps not all your agrē users should have access to the ***Credit (Sensitive)*** category, separate permission must be granted to use it.

Adding a CRM Activity Category

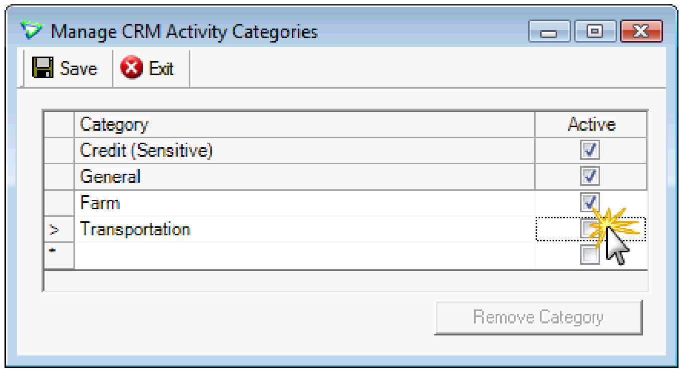
Type a text label in the blank line at the bottom of the list and press **TAB** to activate. ***Save*** your changes.



Editing a CRM Activity Category

To **change the spelling** of a type, double-click on the type and change the text. ***Save*** your changes.

To **deactivate** a type, click on the checkmark in the ***Active*** column to remove it. ***Save*** your changes.

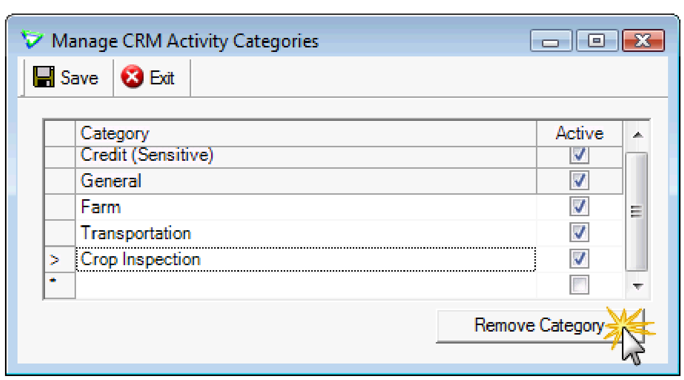


Removing a CRM Activity Category

If a category is not in use it can be permanently removed. If it has been used, you would need to edit every CRM Activity that used that category and select a different one (or delete the activity) before the category could be removed.

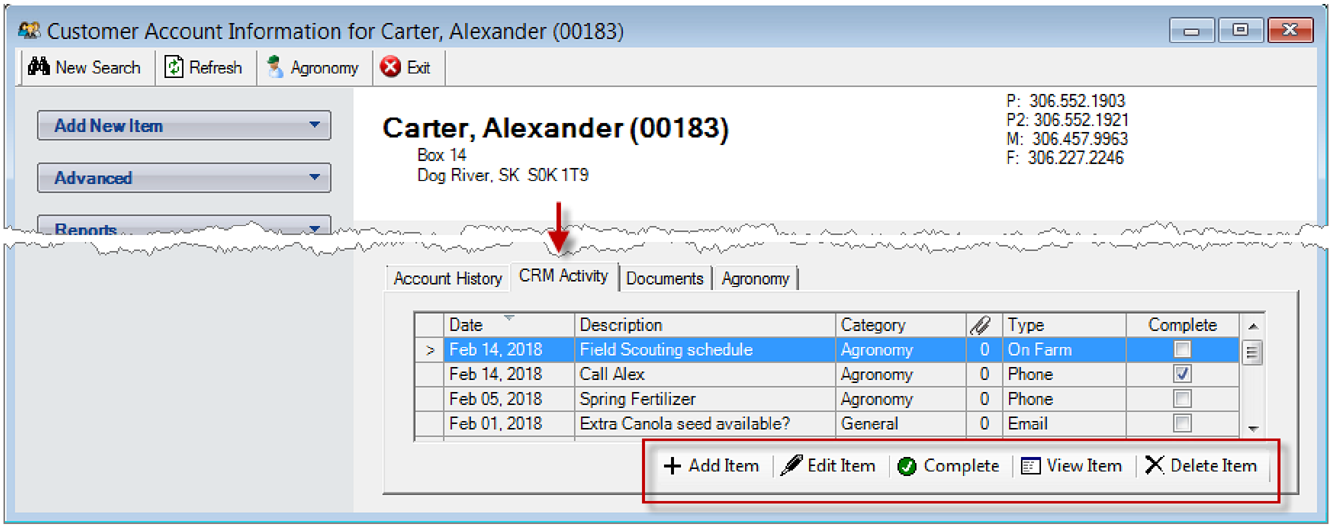
Note You could also deactivate a category instead of removing it permanently. This may be a quicker option if it is currently in use, but you no longer need it.

Select the attribute and click ***Remove Category***. ***Save*** your changes.

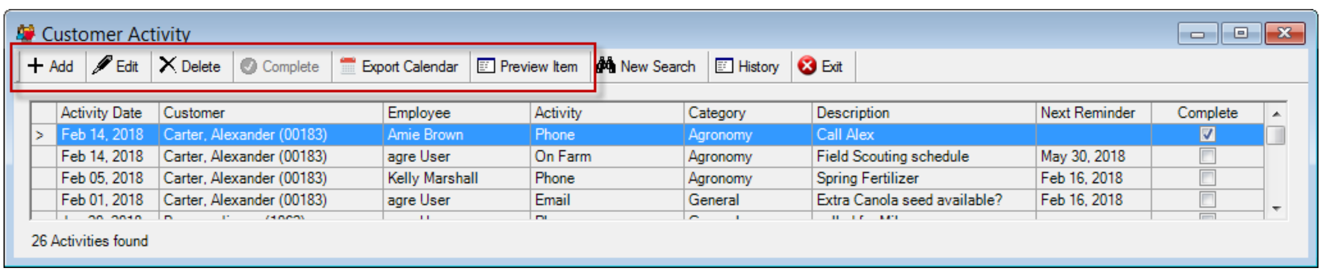


Using CRM Activities

CRM Activities can be managed from the Customer Account on the ***CRM Activity*** tab …

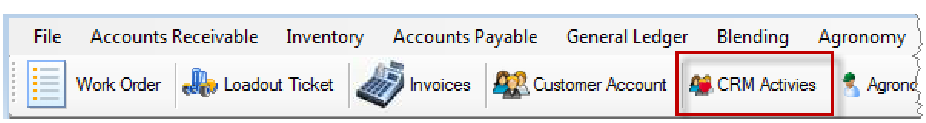


… or from the ***Customer Activity*** window.



Accounts Receivable > CRM > CRM Activities

If using the ***Customer Activity*** window is something you'll do often, consider adding the ***CRM Activities*** shortcut to your toolbar.

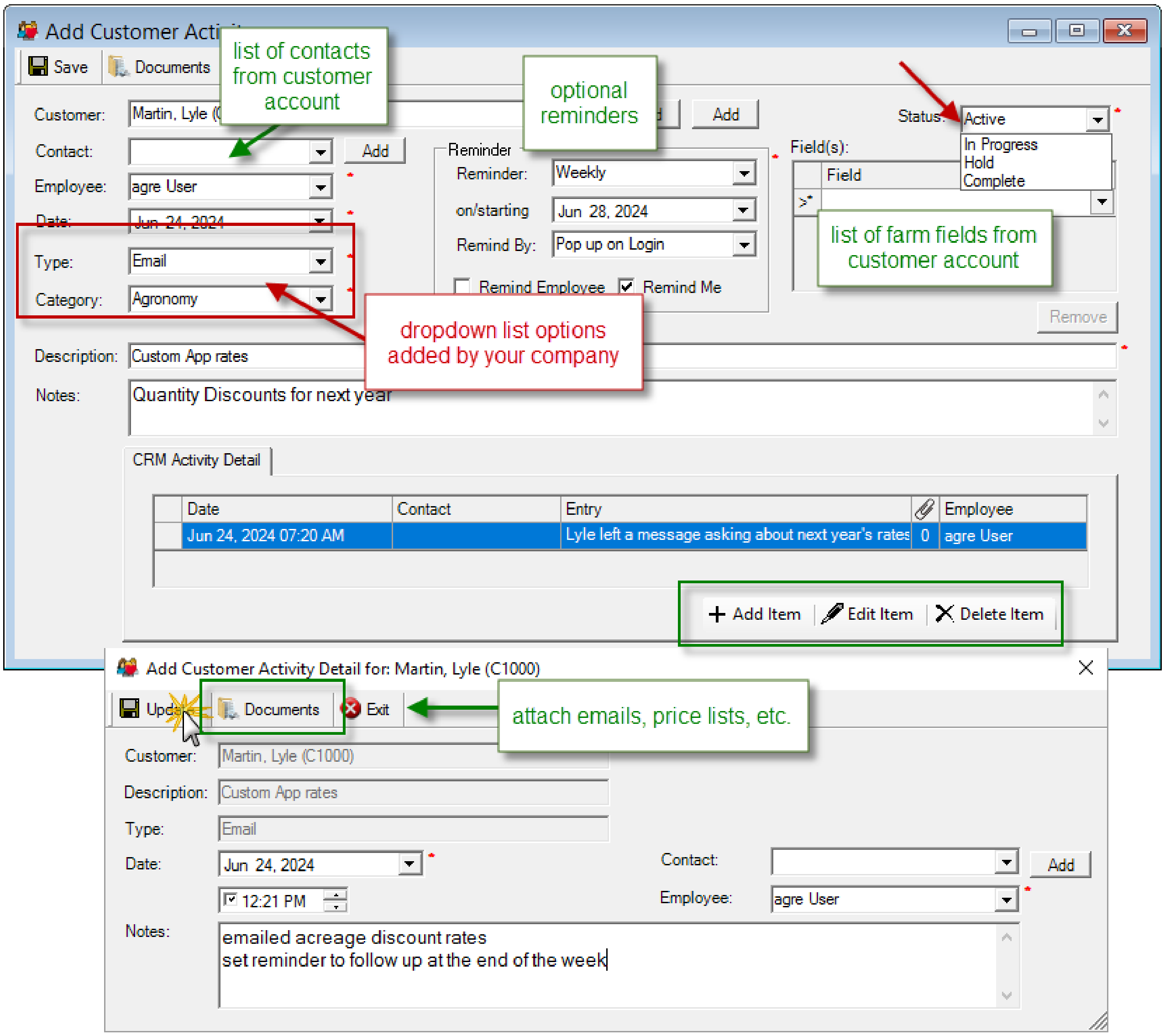


Window > Customize Toolbar

Adding a CRM Activity

Select ***Add*** (Customer Activity window) or ***Add Item*** (Customer Account).

Choose a ***customer*** (if starting from Customer Activity window).

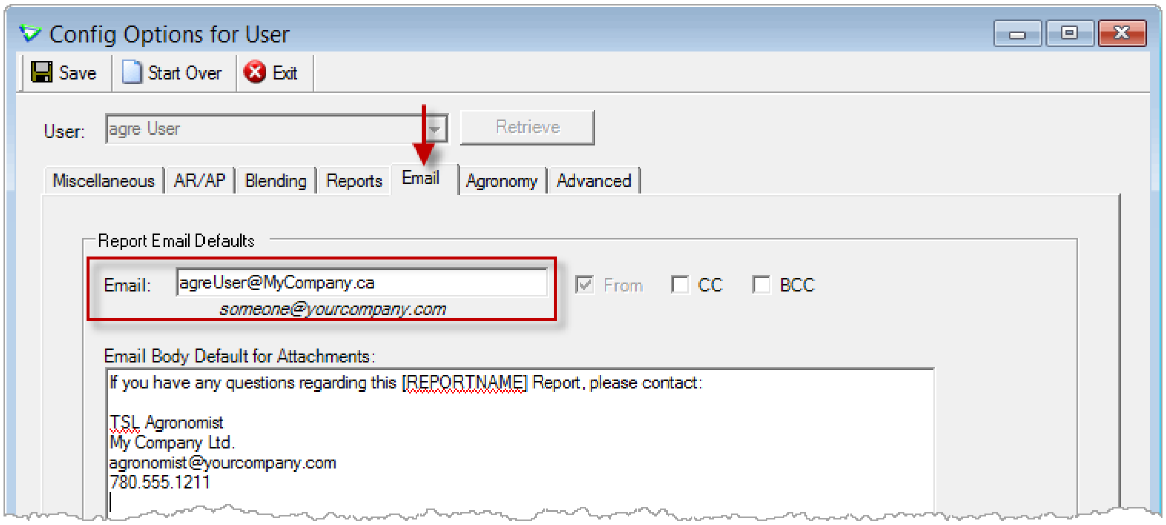


Accounts Receivable > CRM > CRM Activities

Choose a ***contact*** (defaults to main contact), ***employee*** (defaults to the logged-in agrē user), ***date*** (defaults to today), ***type*** and ***category***, and type a ***Description***. ***Notes***, ***Reminders***, and Farm ***Fields*** are optional.

Add Items and update the ***status*** as the activity moves forward.

If you want to ***Remind by Email*** or ***Remind by Both***, either you and/or the Employee (depending on who is selected to be reminded) must have an ***Email*** address setup in their User Config Options.

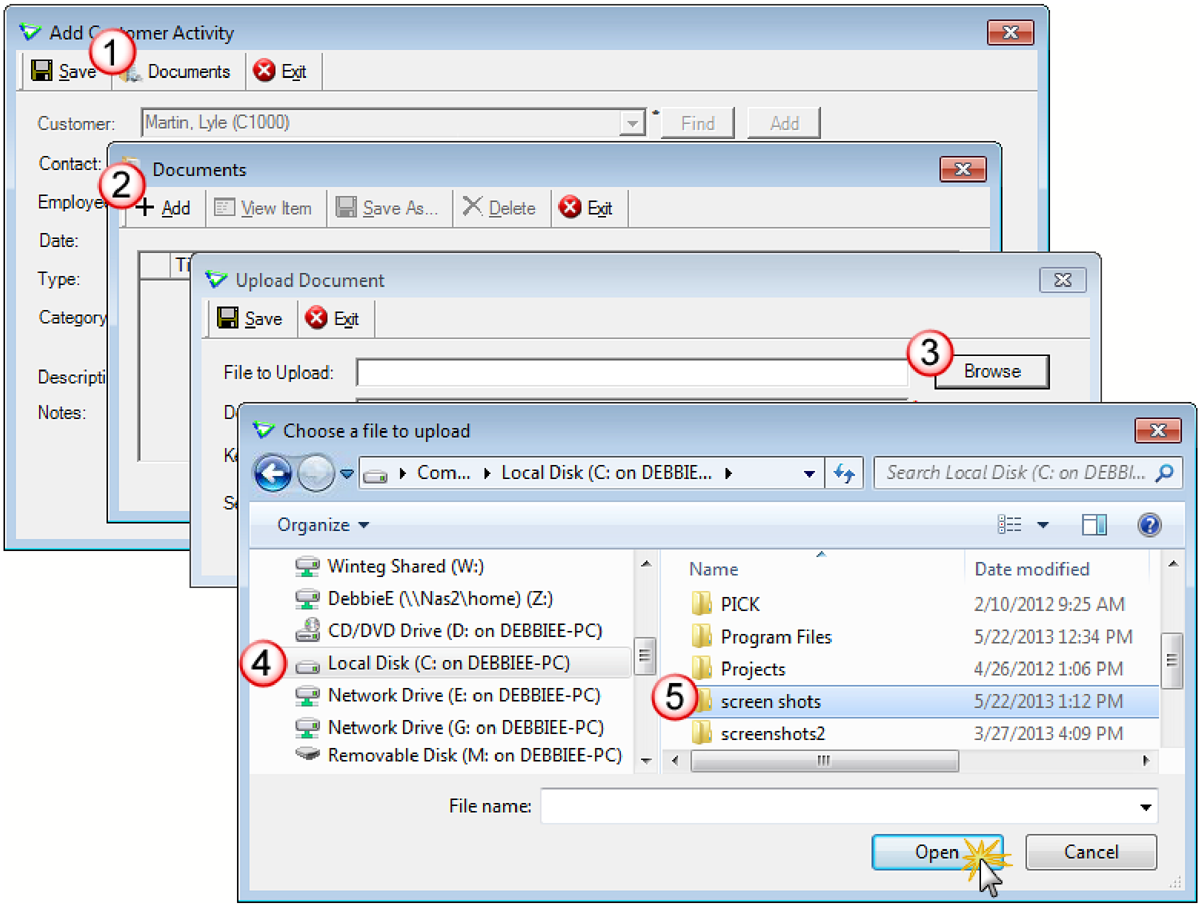


File > Config Options > User

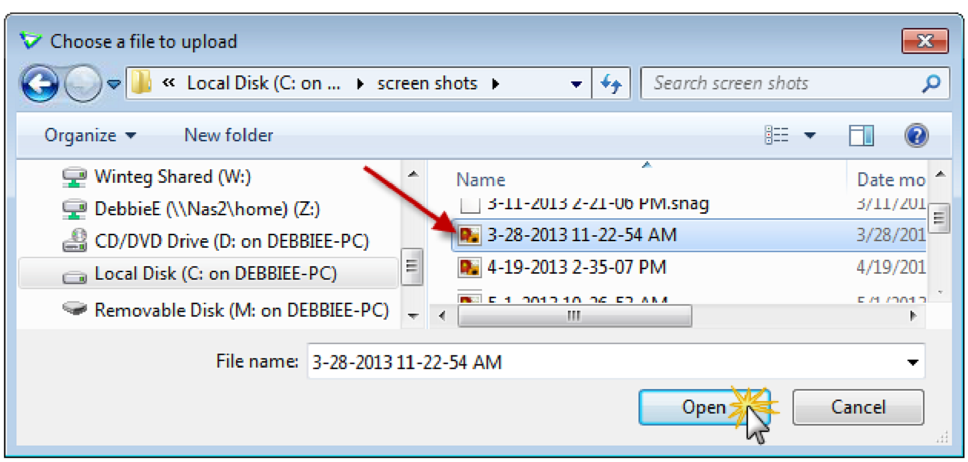
Save the CRM Activity.

Attaching Documents to Activities

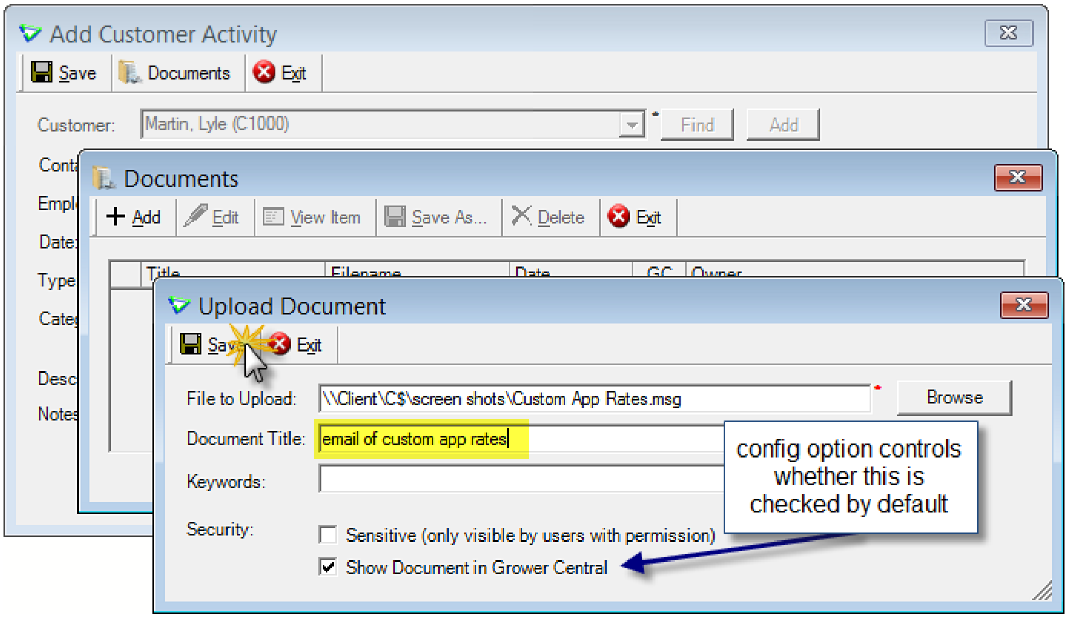
While ***Adding*** or ***Editing*** an activity, click ***Documents > Add > Browse***. Navigate to the folder where the document you want to attach is located.



Select the file and click ***Open***.

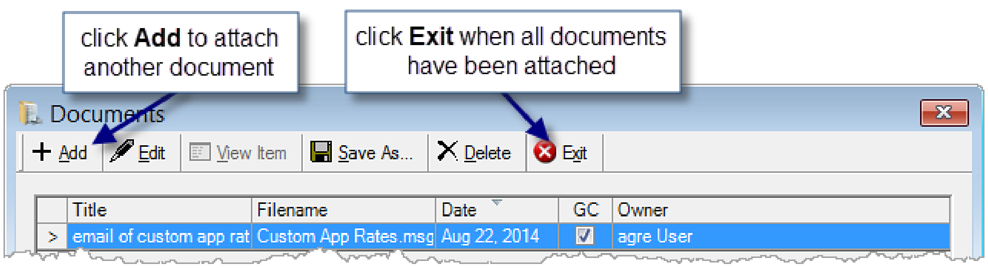


File to Upload defaults to the file you selected. Type a ***Document Title***, and change the ***Security*** options if applicable. ***Save*** to upload the document to agrē.

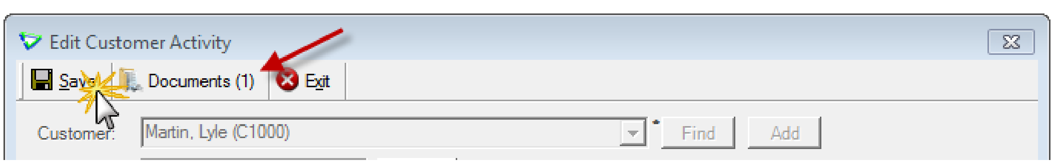


Note	Once a **document** has been **attached** to an Activity, the **Customer name cannot be changed**.

You can attach more than one document to an activity by clicking ***Add*** again. When you've attached all relevant documents, ***Exit*** the Documents window.



The number of attached documents is shown on the button. ***Save*** the Activity.



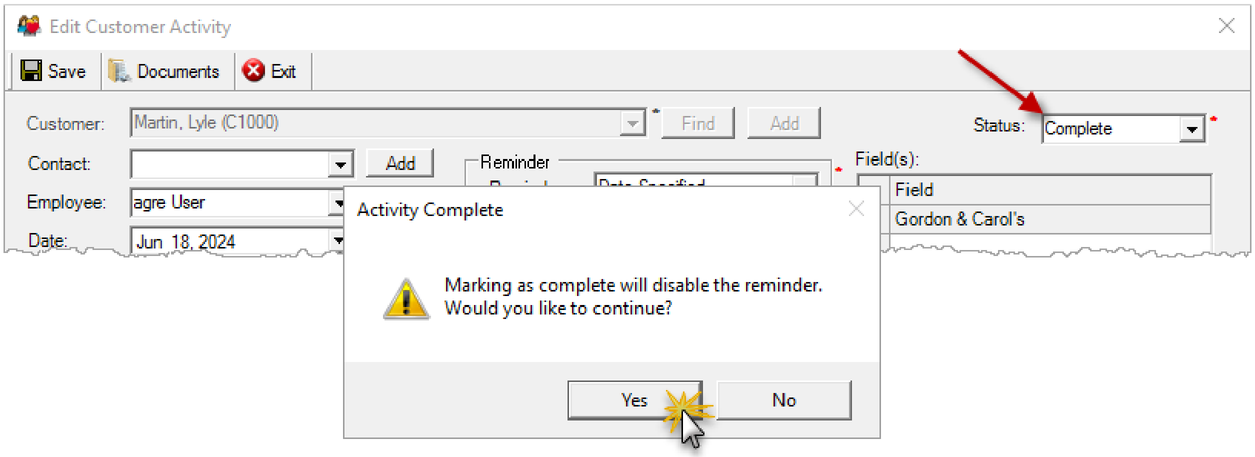
Help	If you share most documents with your customers, you can set the company config option to automatically check ***Show Document in Grower Central*** by default. You can always change it on the fly when uploading the occasional document you *don't* want shared.

Completing CRM Activities

When you're finished with an Activity, flag it as ***Completed***.

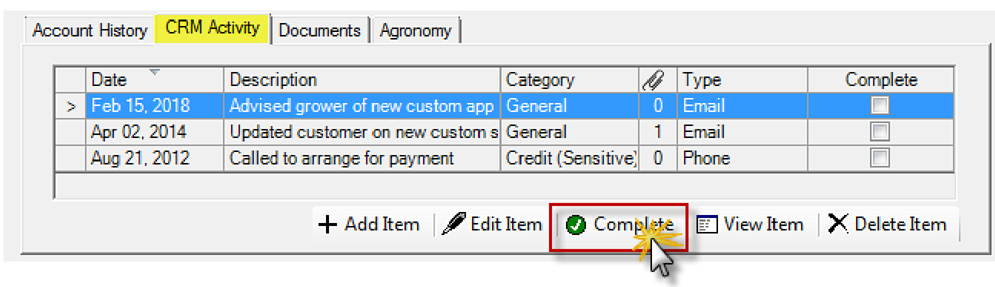
CRM Activities can be ***Completed***:

- by ***Editing*** a CRM Activity

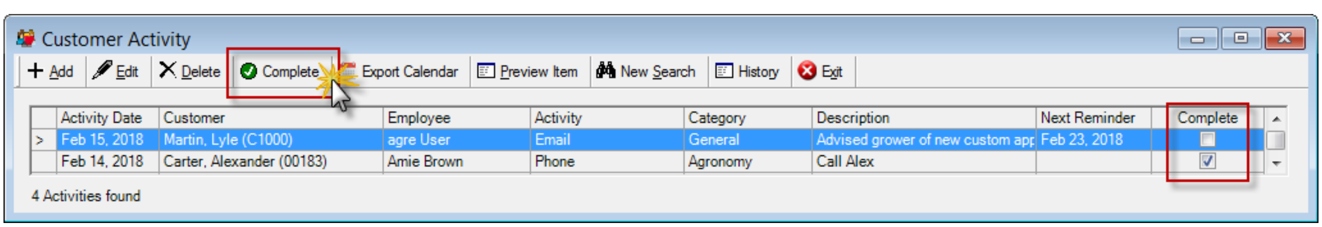


No reminders are generated for Completed activities.

- from the Customer Account's ***CRM Activity tab***



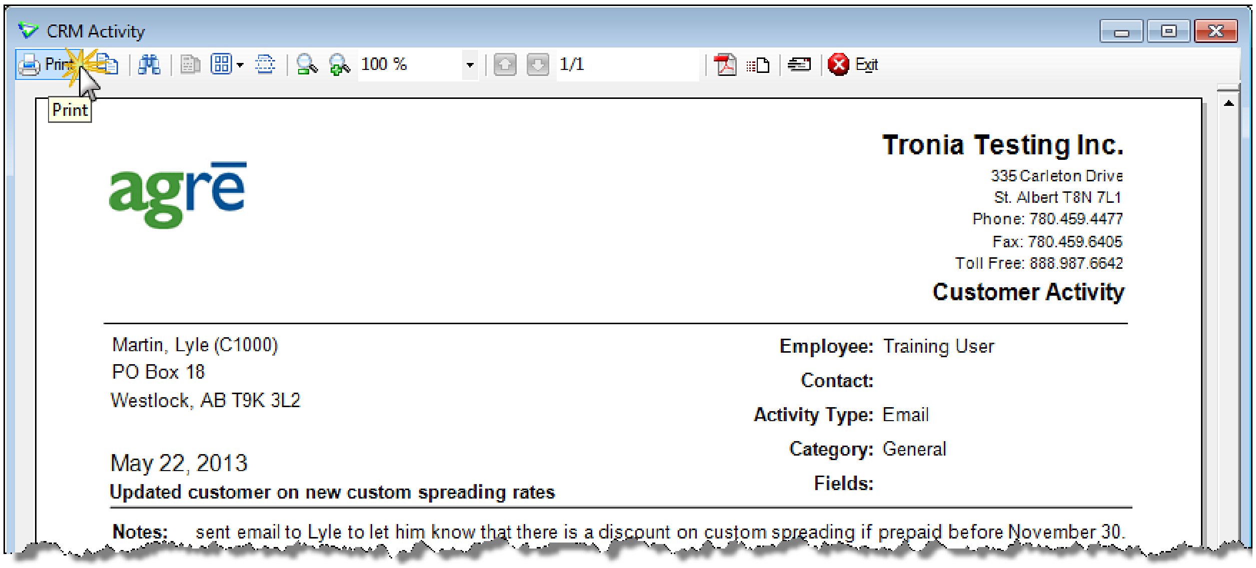
- from the ***Customer Activity*** window



Reports for CRM Activity

CRM Activity

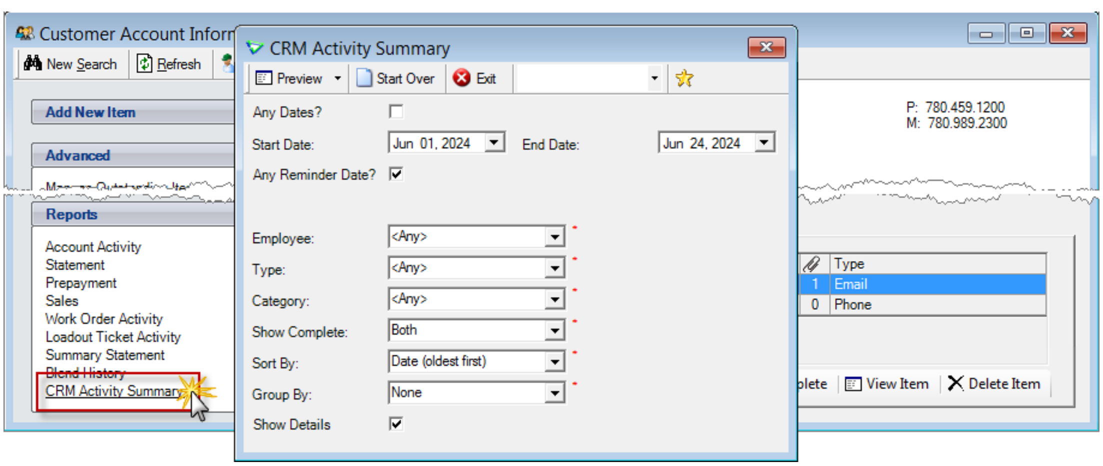
To print a single activity, select it, ***View/Preview*** it, and ***Print*** it.



CRM Activity Summary Report

Single Customer

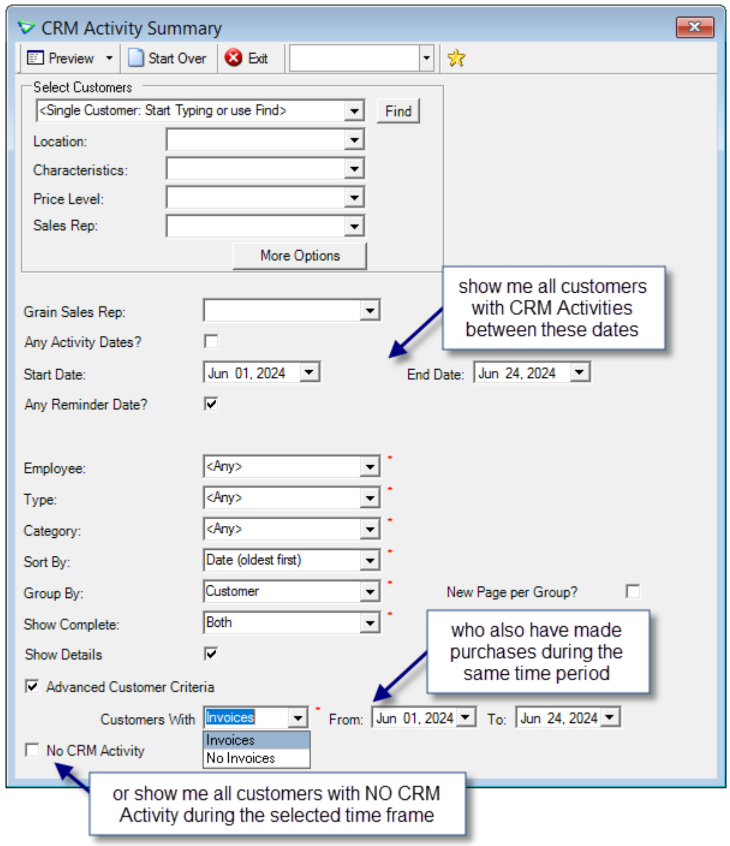
To view multiple activities for a single customer, run the CRM ***Activity Summary report*** from their customer account.



Accounts Receivable > Customer Accounts

Multiple Customers - more criteria too

You can get results for multiple customers by running it from the menu.
You also get more criteria options when running from the menu:



Accounts Receivable > Reports

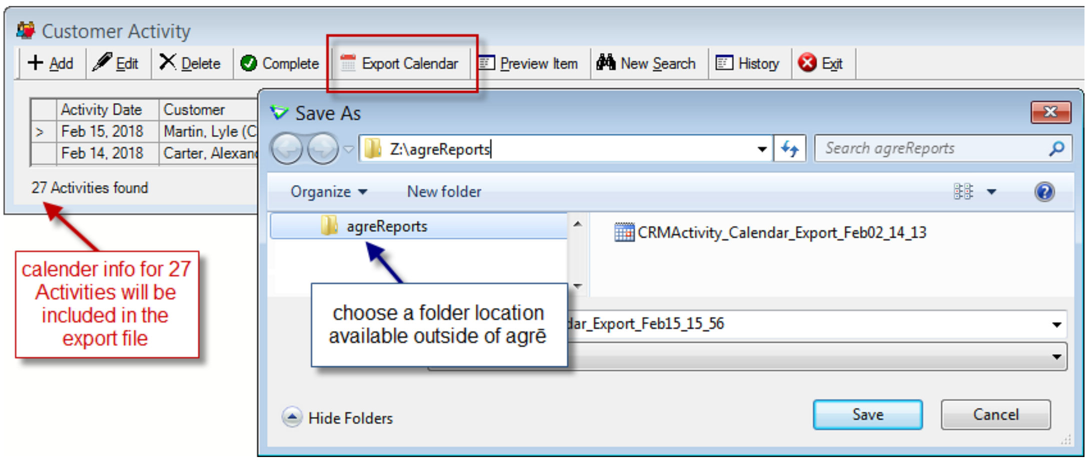
Exporting Calendar Entries for CRM Activities

agrē can generate an .ics file that contains the information required for creating entries in most calendar software (like Microsoft Outlook, Google Calendar, and Apple iCal).

The following information is included in the exported .ics file:

- Next Reminder Date (or Activity Date if there is no reminder)
- Description
- Summary

Calendar entries are exported from the ***Customer Activity*** window.



Remember to save the export file on a drive that is available *outside* of agrē as you'll need to access it from within your calendar software.

Caution Calendar information will be exported for ALL activities visible in the grid. Change the ***New Search*** criteria to display just the activities you want to export.

Once the information has been exported from agrē, follow the instructions provided by your calendar software provider to import the file to create the calendar entries.

Employee Groups

Employee Groups are used for filtering results of the ***CRM Activity Summary report***.

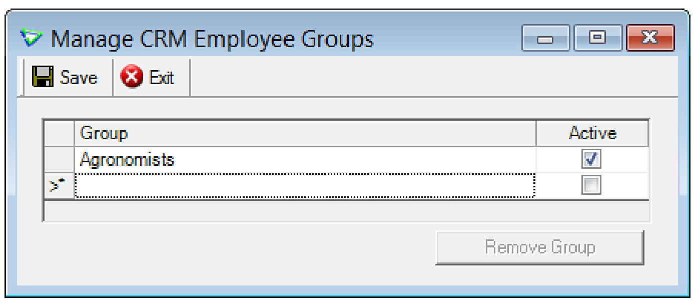
There are **two steps** to setting up ***Employee Groups***:

1. Add new ***Employee Group(s)***
2. Assign agrē users to an ***Employee Group***

Adding an Employee Group

Navigate to ***Accounts Receivable > CRM > Manage > Employee Groups***.

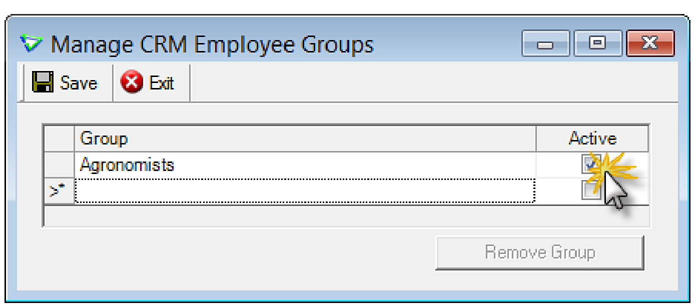
Type a text label in the blank line at the bottom of the list and press **TAB** to activate. ***Save*** your changes.



Editing an Employee Group

To **change the spelling** of a group, double-click on the title and change the text. ***Save*** your changes.

To **deactivate** a group, click on the checkmark in the ***Active*** column to remove it. ***Save*** your changes.

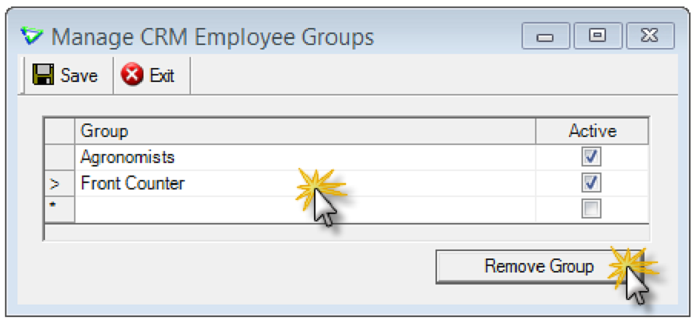


Removing an Employee Group

If a group is not in use it can be permanently removed. If it has been used, you would need to edit every agrē user that has that group specified and select a different one (or remove it) before the group could be removed.

Note	You could also deactivate a group instead of removing it permanently. This may be a quicker option if it is currently in use, but you no longer need it.

Select the attribute and click ***Remove Group***. ***Save*** your changes.



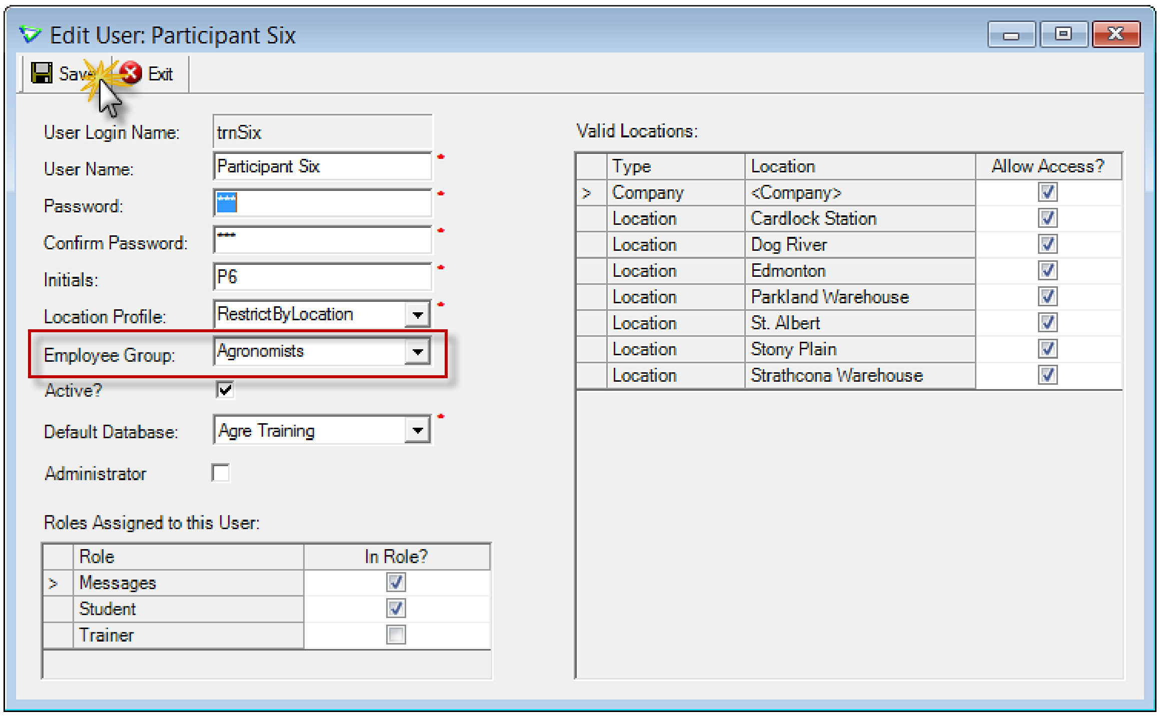
Assigning agrē Users to an Employee Group

Employees are assigned to ***CRM Employee Groups*** through security settings.

Navigate to ***File > Security > Manage Users***.

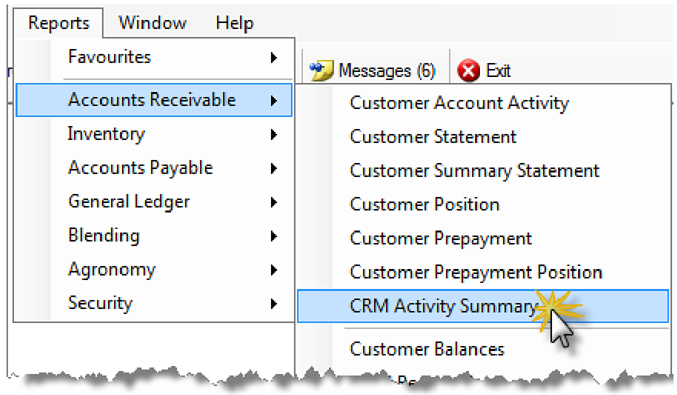
Select the user you want to add to a CRM Employee Group and click ***Edit***.

Choose the ***Employee Group*** and ***Save*** your changes.

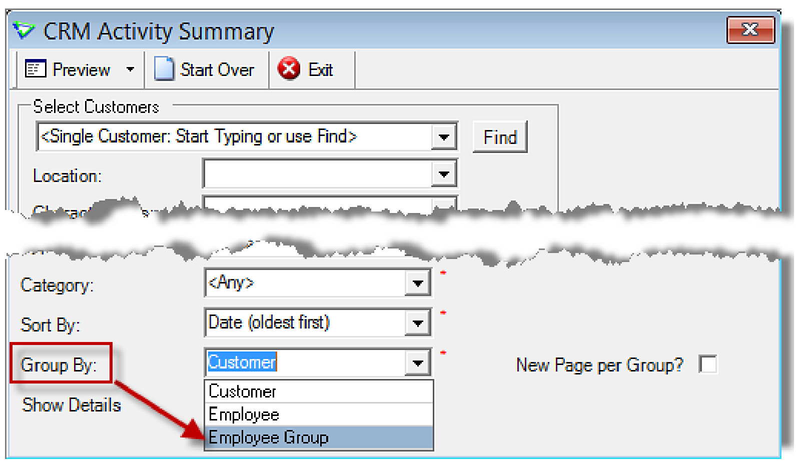


Filtering Report Results by Employee Group

After employees have been added to ***Employee Groups***, you can filter activity lists by who created them.

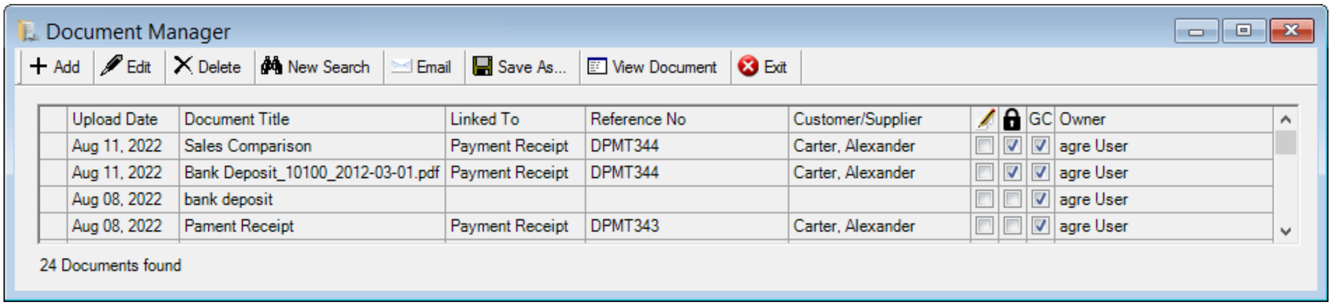


Run the ***CRM Activity Summary*** and ***Group By*** an employee group.



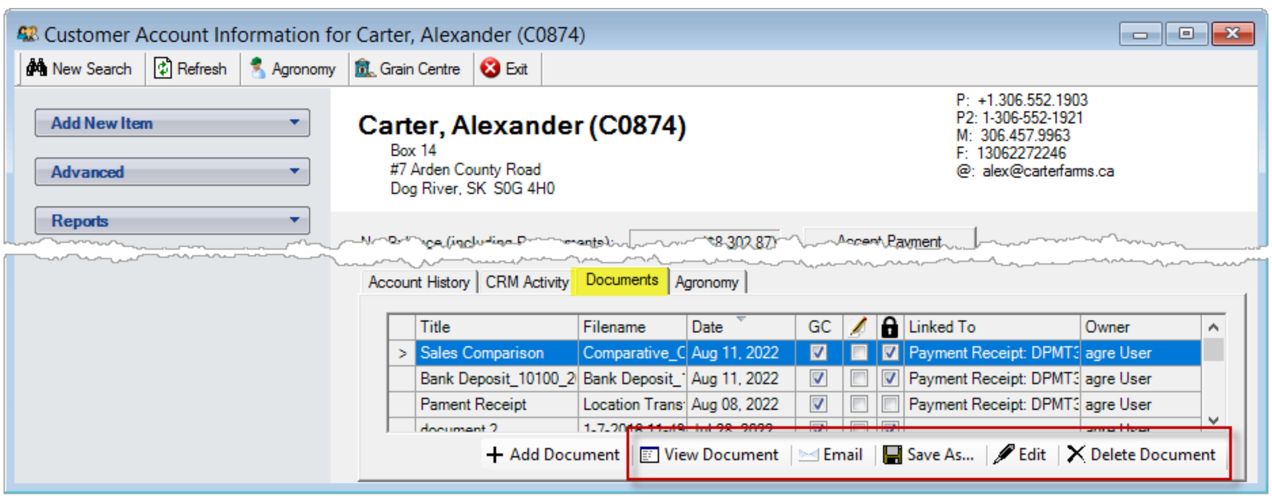
Document Manager

The ***Document Manager*** allows you to organize *all* documents (attached PDFs, eSignatures, eDocs, emails, photos, etc.) from one central place. From here you can add, edit, delete, download, and view.



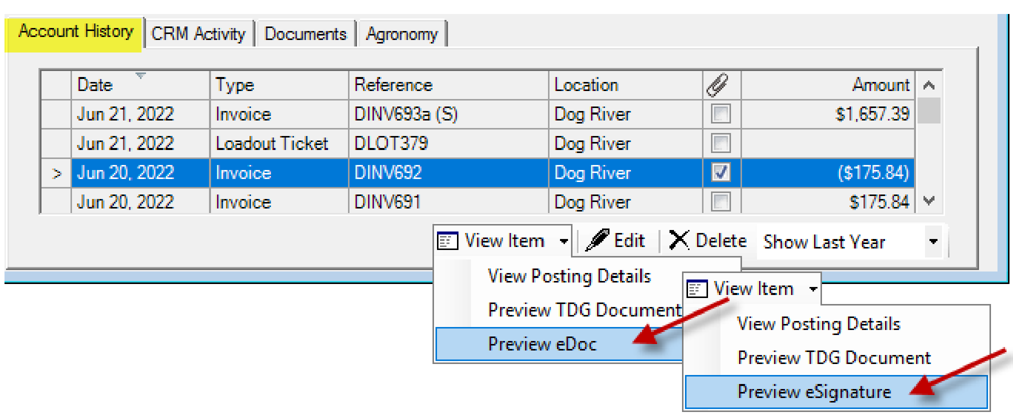
File > Manage > Documents

As well, customer documents can be managed from the customer account on the ***Documents tab*** …

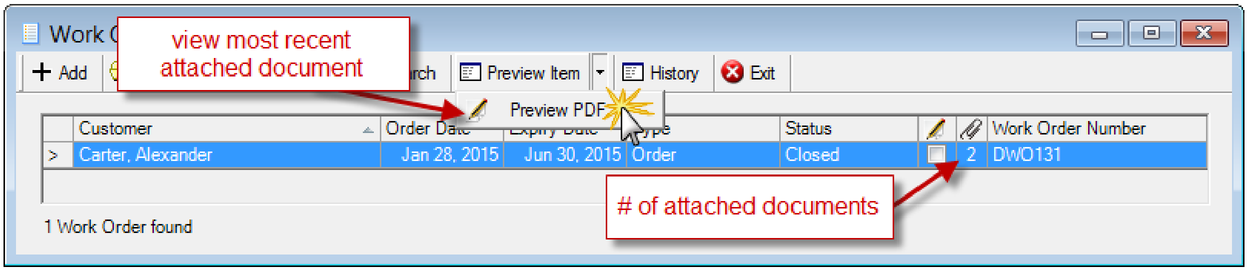


Accounts Receivable > Customer Accounts

… and the last attached ***eDocument*** or ***eSignature*** can be viewed from the ***Account History tab***.



The most recently attached ***eDocument*** or ***eSignature*** can be viewed also from its respective home form.



Accounts Receivable > Work Orders

Maximum file size that can be uploaded is 5 MB.

The following types of documents can be uploaded:

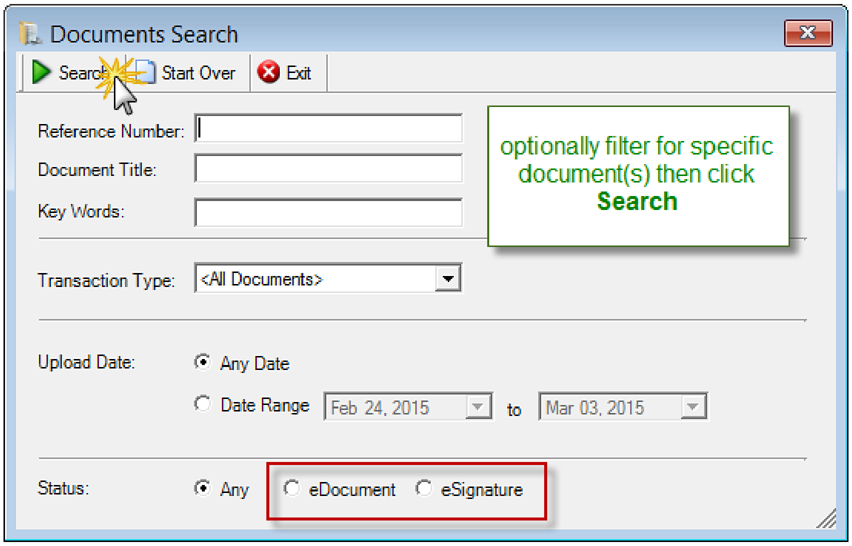
File Extension	Built-in Viewer?
.DOC	**Yes**
.DOCX	**Yes**
.DWF	
.GIF	**Yes**
.HTML	
.HTM	
.JPE	**Yes**
.JPEG	**Yes**
.JPG	**Yes**
.MSG	
.PDF	**Yes**
.PNG	**Yes**
.PPT	**Yes**
.PPTX	**Yes**
.TIF	**Yes**
.TXT	**Yes**
.XLS	**Yes**
.XLSX	**Yes**
.Z	
.ZIP	

Not all documents types have a built-in viewer.

For those that don't, download the file and view it with the source application installed on your local computer.

Searching for Documents

As soon as you open the Document Manager (***File > Manage > Documents***) the default search screen opens.



File > Manage Documents > Search

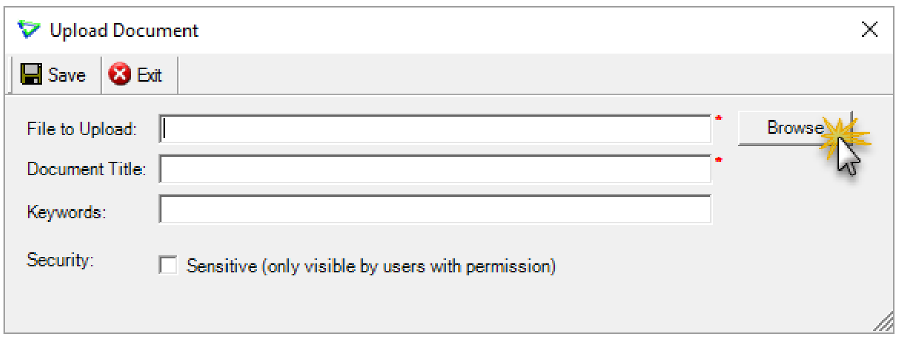
Note	eDocuments are included with agrē. ***eSignature*** is a premium module.

Adding a Document

Note	Adding a document from the ***Document Manager*** does not allow you to associate it with any particular customer or AR transaction.

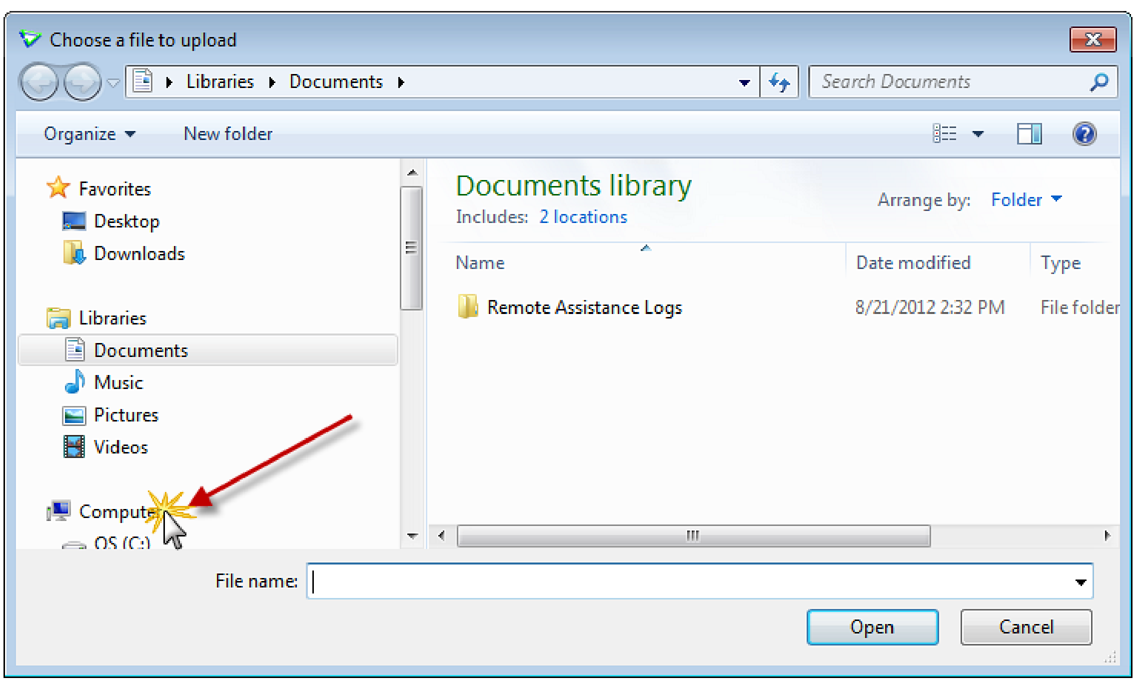
Click ***Add Document***.
The ***Upload Document*** window opens.

Click ***Browse***.
The ***Chose a File to Upload*** window opens.

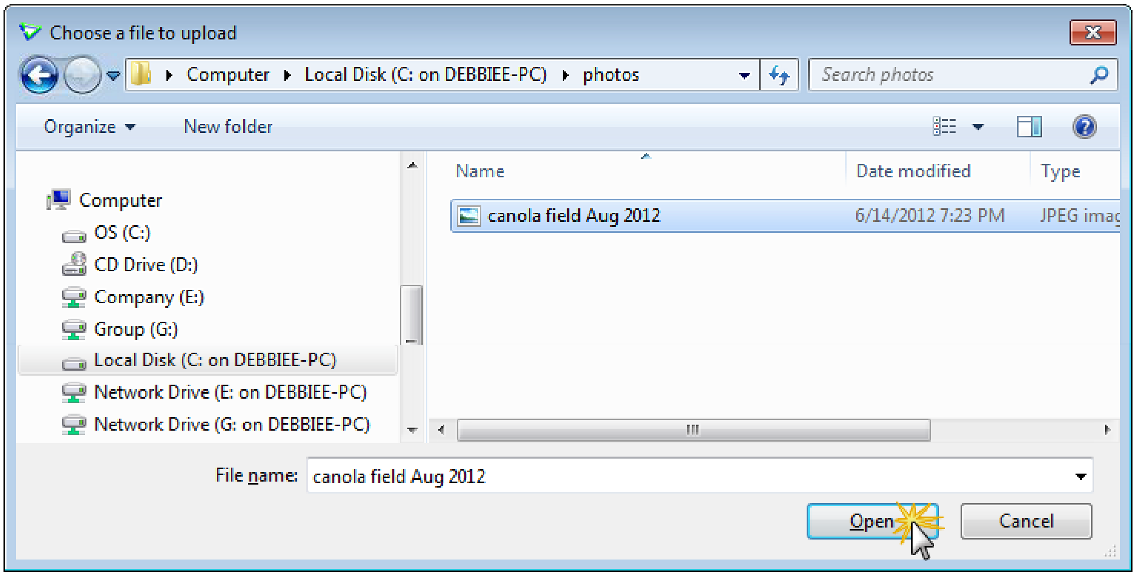


File > Manage > Documents > Add

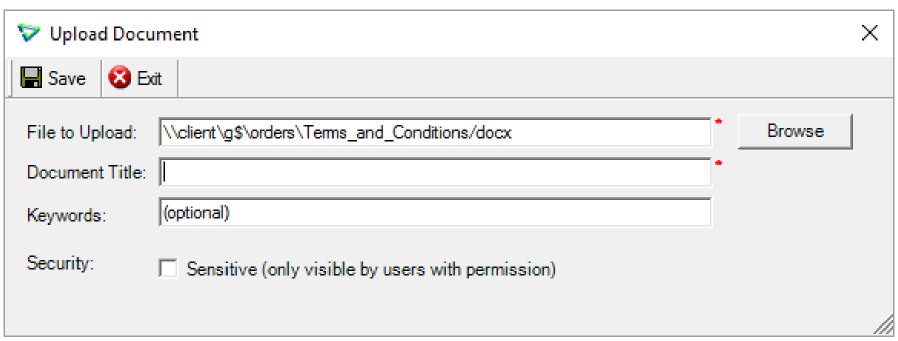
Click **Computer** in the Navigation pane (left hand side of the window).
Navigate to where the file is stored on a local drive on your computer, or on a local network drive.



From the File List pane (right hand side of the window) select the file to upload.
Click **Open**. The **Chose a File to Upload** window closes and focus returns to the ***Upload Document*** window with the ***File to Upload*** field filled in with the filename you selected.



Add a ***Document Title*** to easily identify the file contents.
Keep it short and put the important part first as the column on the customer account is not quite wide enough to display all characters typed.



Optionally add ***Keywords*** about the document.

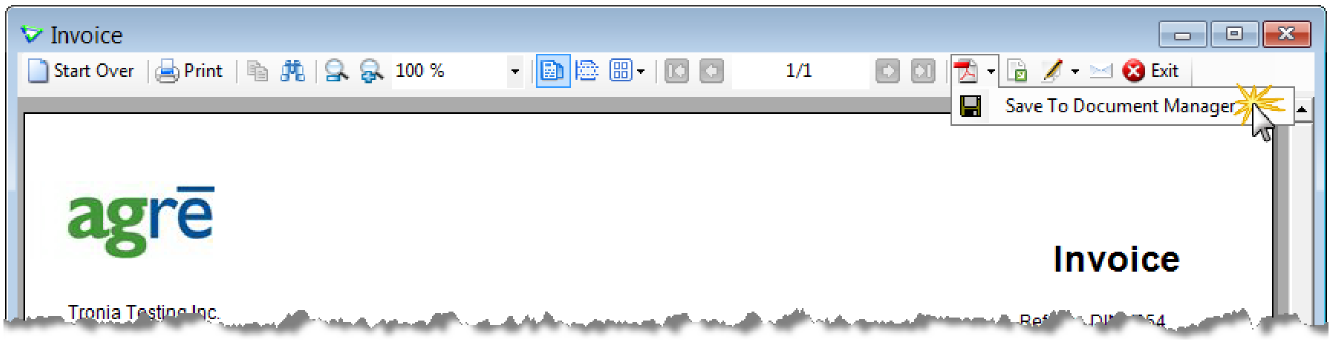
Check ***Sensitive*** if only users with "sensitive" security access should be allowed to view the document.

Click ***Save*** to upload the document.

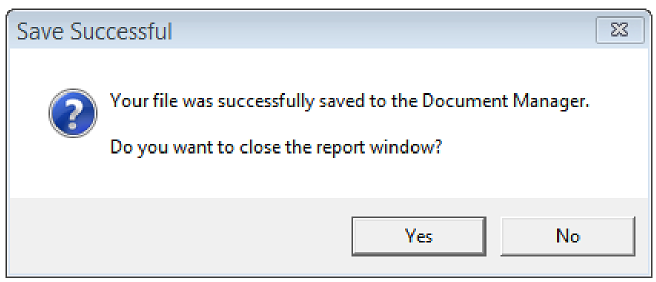
Save to Document Manager

Instead of printing, scanning, and manually uploading, you can create a PDF copy of some agrē reports which saves it to the ***Document Manager*** directly, and links automatically to the transaction.

Preview the report. Click the PDF more options arrow, then ***Save to Document Manager***.

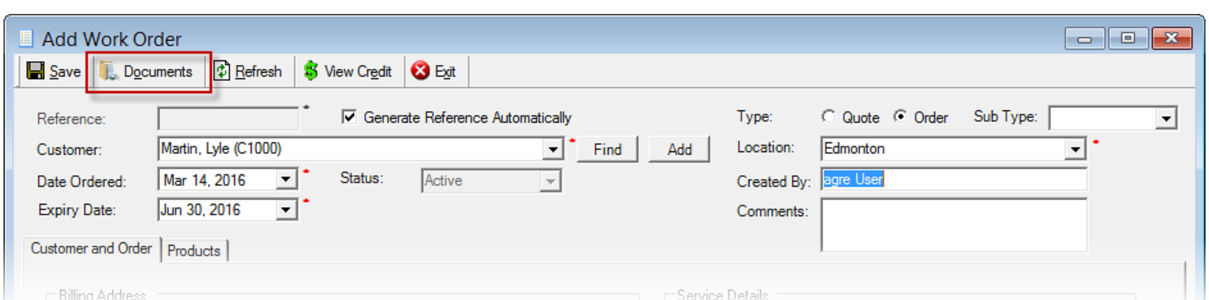


Once the PDF has been saved to the ***Document Manager***, agrē can close the report or leave it open.

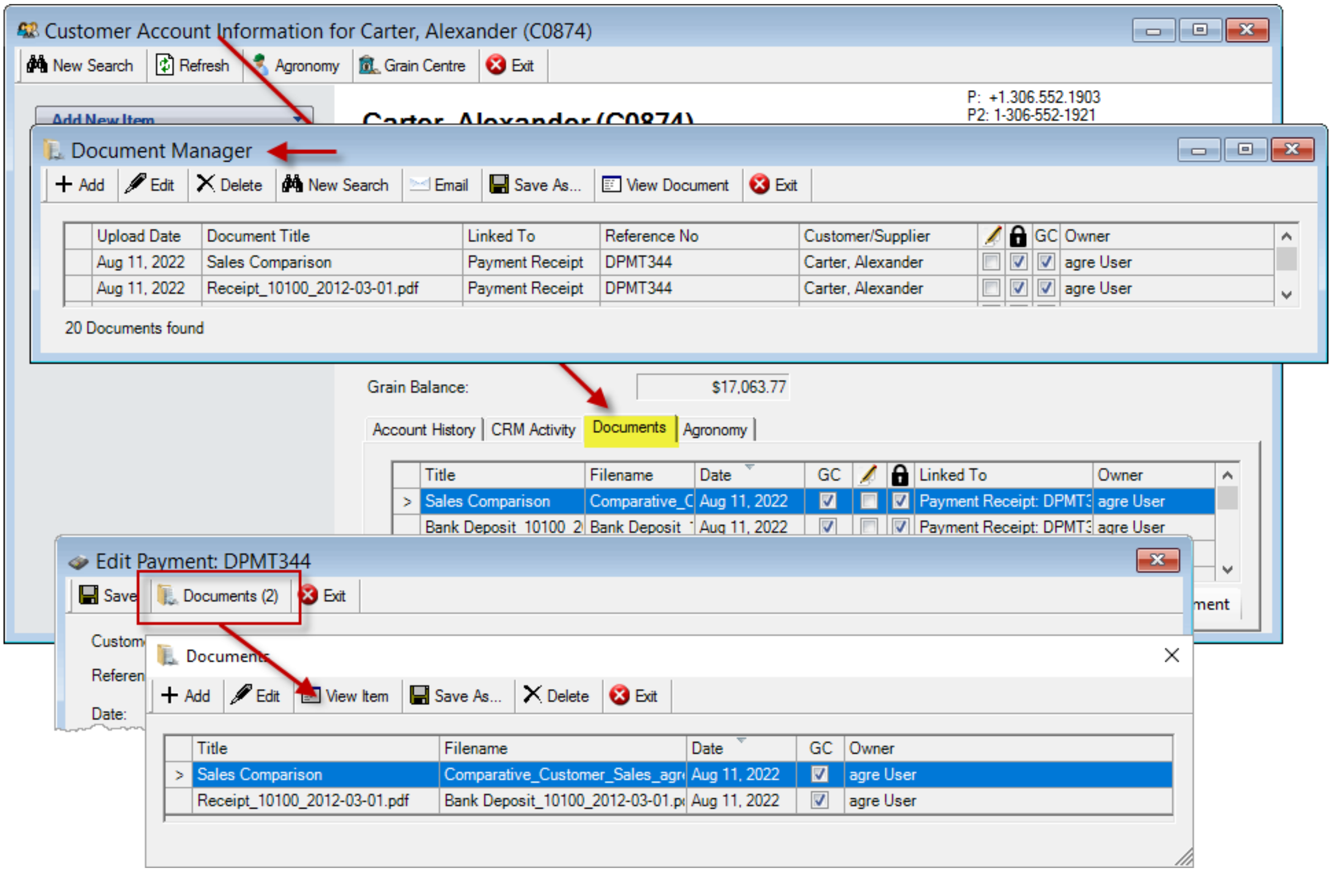


Adding a Document Manually to a Transaction Form

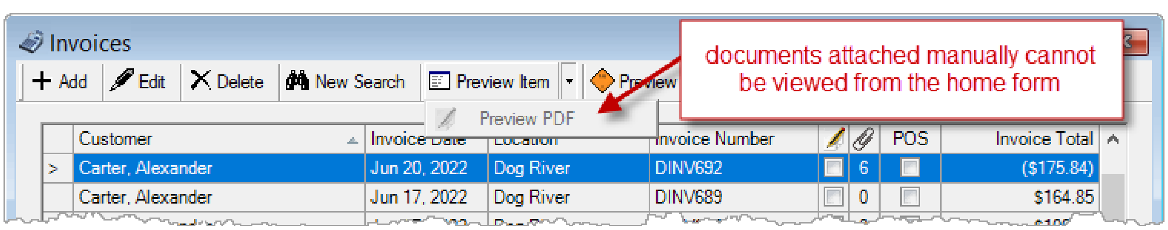
Documents can also be added to certain transactions. For example, if a customer sent you an email regarding their prepayment plan for fertilizer, you could attach it directly to the relevant Work Order.



Documents attached manually to a transaction can be viewed from the usual places *except* they cannot be viewed from their respective home forms through the ***Preview Item*** button.



AR > Customer Account
File > Manage > Documents
Individual Transactions (i.e. WO, LOT, INV, PMT, etc.)

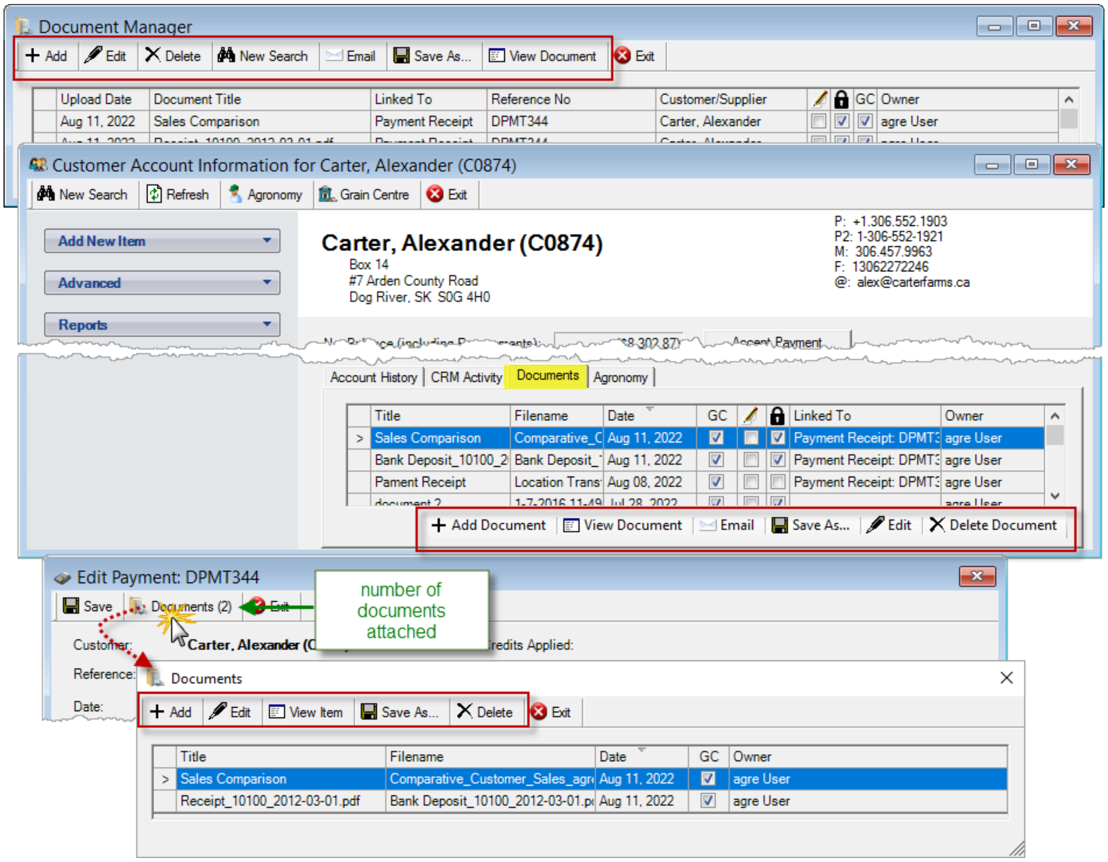


Accounts Receivable > Invoices

If the most recent document was attached manually, eDocument and eSignatures will not be visible from the home form either.

Viewing a Document

From the ***Document Manager***, *or* from the customer account ***Documents*** tab, *or* from the form ***Documents*** window, select the document you want to view.



Click ***View Item*** or ***View Document*** (depending on where you are).
While viewing, you can also print the document by clicking on ***Print***.

Editing a Document

Click ***Edit***.
The ***Edit Document Attributes*** window opens.

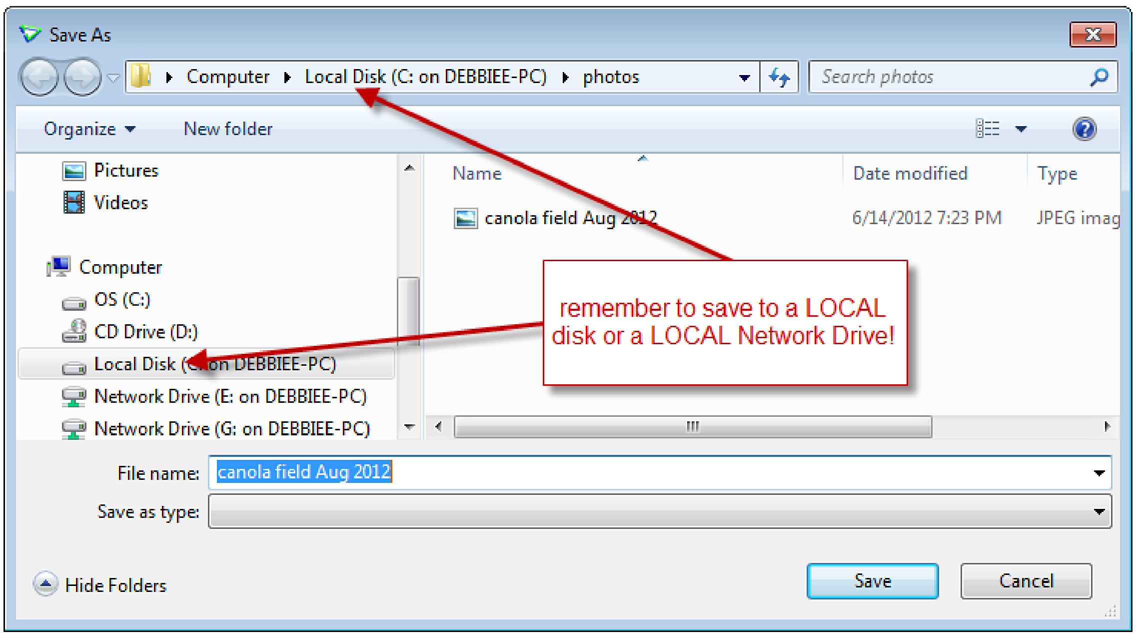
Change the ***Document Title***, ***Keywords***, or ***Security***.

Click ***Save***.
Changes are effective immediately.

Downloading/Saving a Document

Click ***Save As …***
The ***Save As*** window opens.

Note	The **default destination** directory is **on the agrē server**. Remember to save the file in a folder on your *local* hard drive, or on a *local* network drive or you will not be able to access the file outside of agrē.



Navigate to where you want to save the file and click ***Save***.
The ***Save As*** window closes.

Deleting a Document

Click ***Delete Document***.
The ***Confirm Delete*** window opens.

Click ***Yes*** to delete the document.
The ***Confirm Delete*** window closes and the document is deleted immediately.

Note	Deleting a transaction (Work Order, Loadout Ticket, etc.) does NOT delete automatically the associated documents! Delete the documents first, then delete the transaction.

Security for CRM

CRM is a large module and there are several permissions items related to it.

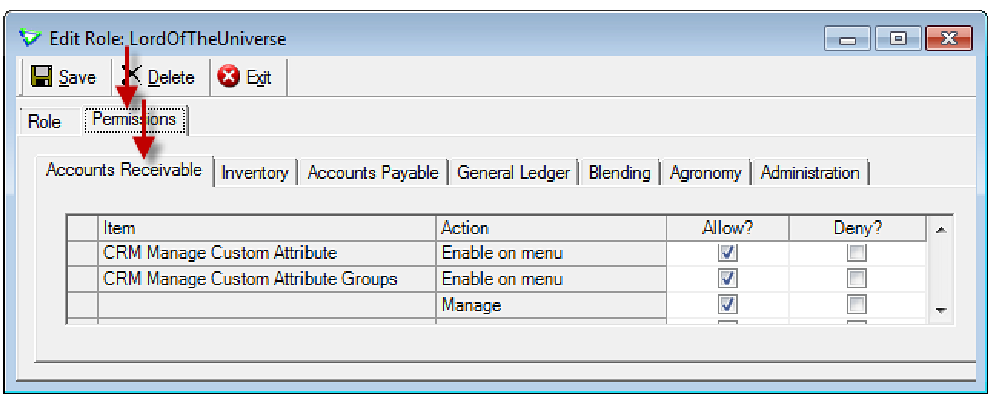
Note	Security settings are managed by your local company security administrators. We don't presume to know who should have access and who should not, so we leave that up to them.

Managing Custom Attributes Security

Navigate to ***File > Security > Manage Roles***.

By default any user who is allowed to edit a customer account will be allowed to edit Custom Attribute information on the ***CRM tab*** (except for the Credit group – that is secured separately) but you may want to restrict who can setup the attribute and group choices that appear in the dropdown lists.

To allow permission to **manage** (add new, edit, remove) ***Custom Attributes*** and ***Attribute Groups***:

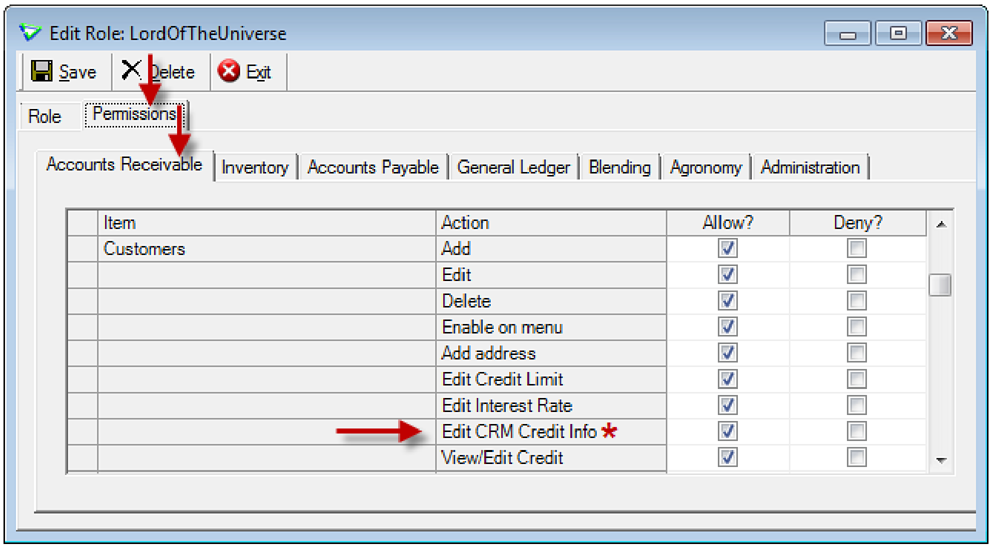


File > Security > Manage Roles > Permissions > Accounts Receivable

Credit Group Security

Similar to the data on the customer account ***Credit/Finance tab***, there is a separate permission to allow access to the ***Credit group*** on the ***CRM tab***.

To allow permission to edit the attributes in the ***Credit group*** on the ***Customer Account CRM tab***:

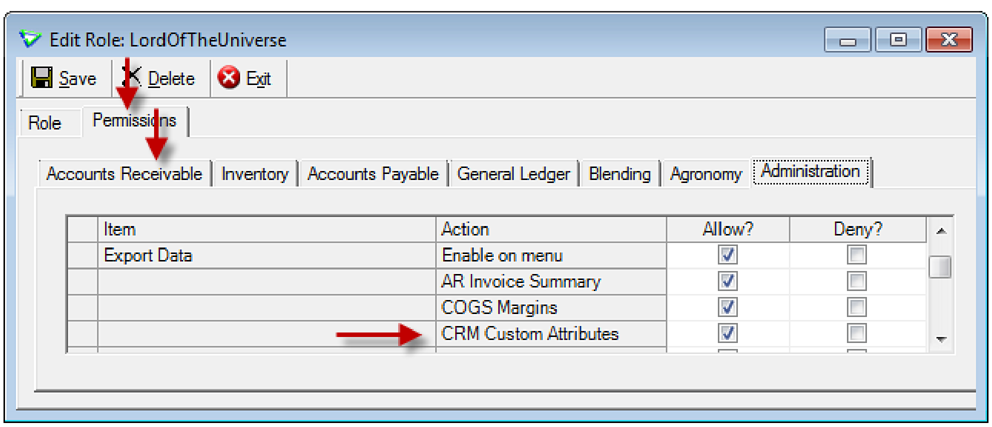


* not everyone may need this

File > Security > Manage Roles

Custom Attribute Export Security

To allow permission to export Custom Attributes:

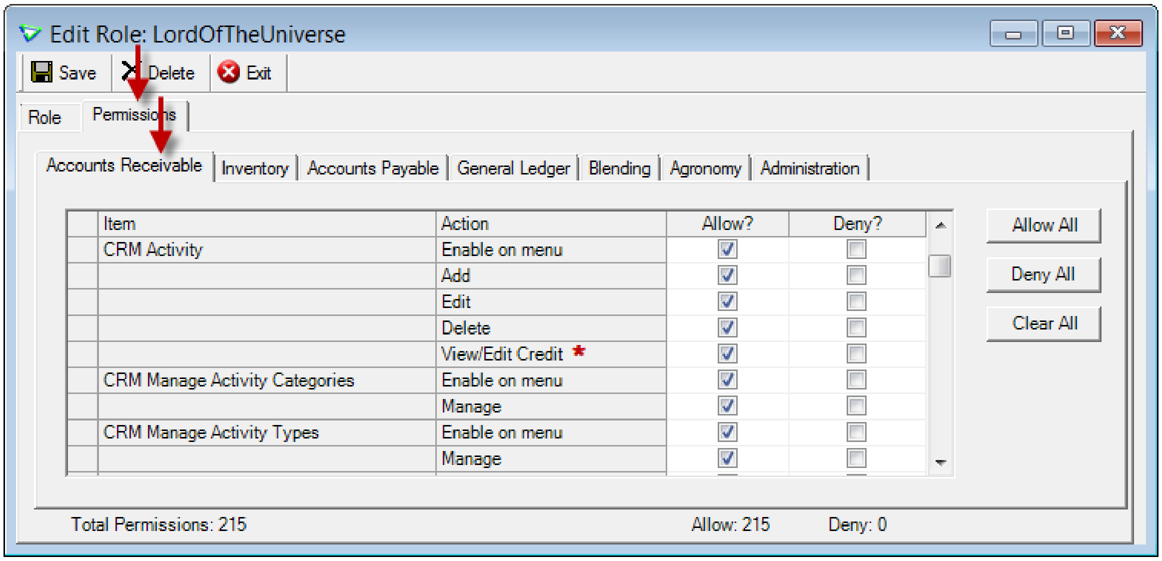


File > Security > Manage Roles

Note If a user does not have permission to view ***Credit group*** custom attributes, they will not be allowed to preview or export them either.

Managing CRM Activity Security

To allow permissions to **use** and to **manage** (setup the dropdown lists) CRM Activities, and to allow permission to the ***Customer Activity*** window:

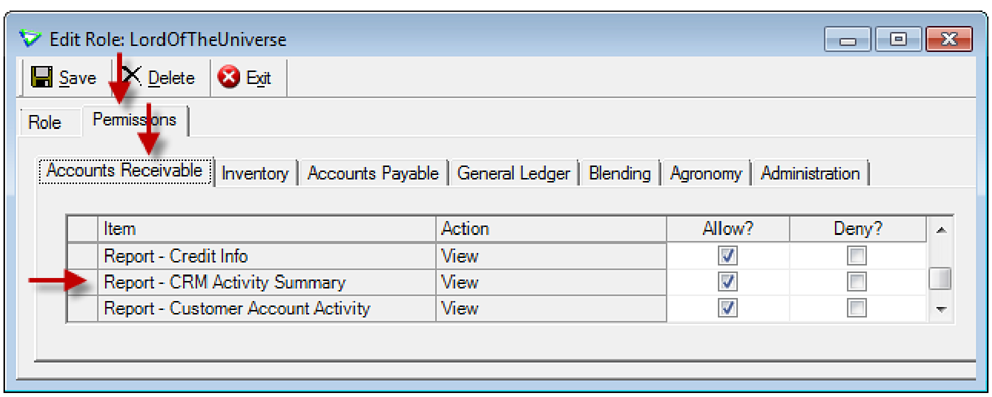


* this is the Credit (Sensitive) permission, not everyone may need this

File > Security > Manage Roles

CRM Activity Reports

To allow permission to view a single CRM Activity and the CRM Activity Summary Report:

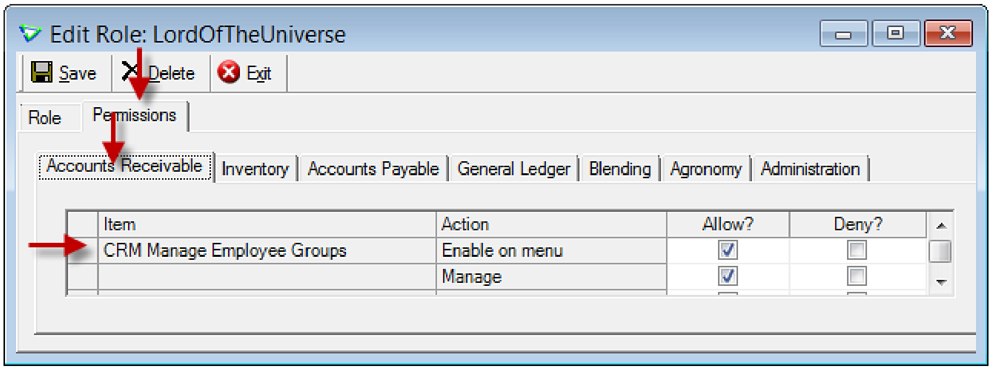


File > Security > Manage Roles

Note If a user does not have permission to create ***Credit (Sensitive) category*** CRM Activities, they will not be allowed to view or print them either.

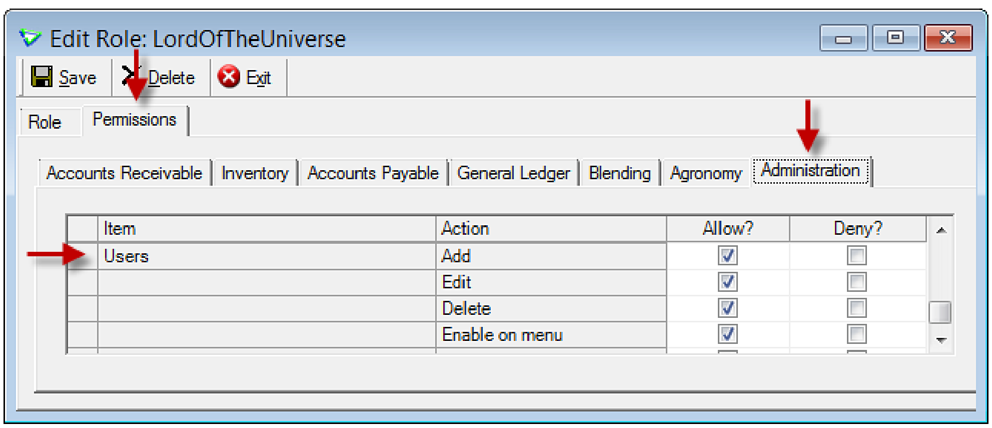
Managing CRM Employee Groups

To allow permission to create and manage Employee Groups:



File > Security > Manage Roles

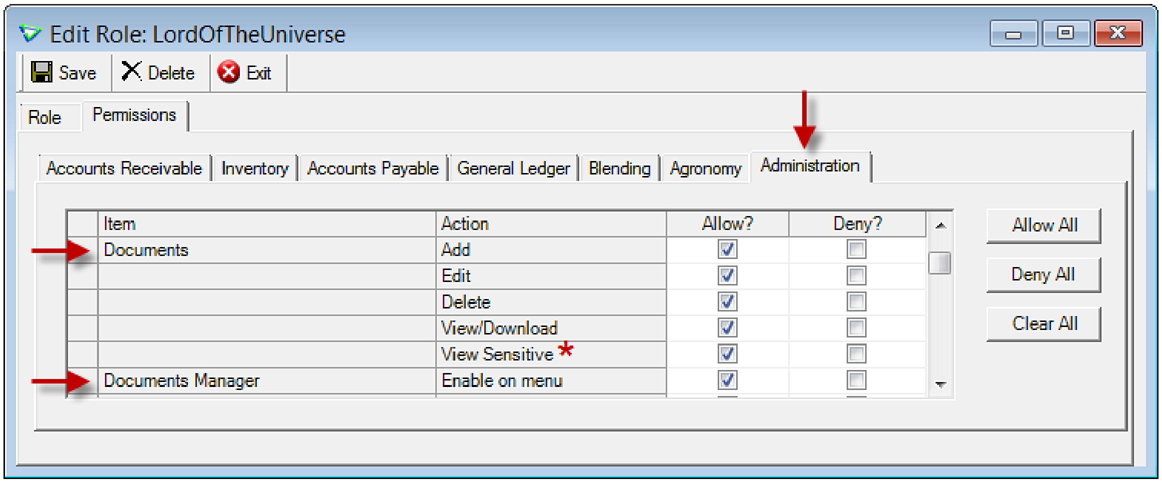
To allow permission to manage agrē users so they can be assigned to Employee Groups:



File > Security > Manage Roles

Security for Document Manager

- Any user who is allowed to view a document will also be allowed to download it.
- ***Sensitive*** permission is meant for documents that not every user needs to view.



* not everyone may need this

File > Security > Manage Roles