



CRM  
Services

# Key CRM Services

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Dayton OH Since 1988!

# Getting Started



Part 1: Basics, Entering Notes, Entering Tasks, Tips

# Overview of Part 1 Training on CRM

Understanding the  
Hierarchy of the  
system

System Basics  
including shortcuts

Adding and  
Searching for  
Contacts/Accounts

Adding Donations

Understanding  
System Concepts

# Hierarchy of the CRM – Account > Contact > Transaction

## Corporate Donor

Marilouise Beeman

- Donation Amount
- Note
- Task
- Call

John Deer

- Donation Amount
- Document
- Call
- Note

## Golf Team Members

Liz McCord

- Registered

Gerry Locker

- Registered

# What is an Account?

## Account Types

Corporate Donors

Golf Teams

Vendors

Any company associated with the event

# What is a Contact?

## Contact

Donor Contact Name

Volunteers

Committee Chairs

Committee Member

Contact at a Vendor

Golf Player

# Visualization of a CRM



Click Phone  
Numbers to Dial

PAULA INSKEEP ☆

OVERVIEW MORE INFORMATION OTHER ACTIONS ▾

First Name:	Paula
Office Phone:	<a href="tel:614-898-6624">614-898-6624</a>
Job Title:	co-owner

- This only works on cell phones.
- You can click on a phone number in the system to start a call



# Concepts

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Things to know about the CRM

# Edit View and Detail View

ROBIN JERNIGAN » EDIT

SAVE CANCEL SAVE AND CONTINUE VIEW CHANGE LOG < (22 of 202) >

OVERVIEW

First Name:  Last Name:

Office Phone:  Mobile:

Job Title:  Department:

Account Name:  Fax:

Email Address:   Primary  Opted Out  Invalid

ACTIVITIES

HISTORY

Subject	Status	Contact
<a href="#">Discuss pricing</a>	Sent	<a href="#">Deanne Klopp</a>
<a href="#">Send quote</a>	Completed	<a href="#">Deanne Klopp</a>

DOCUMENTS

OPPORTUNITIES

LEADS

CAMPAIGNS

CASES

## Navigation Tips – Edit vs Detail Views

Name	Job Title	Account Name
 <a href="#">Thurman Mullings</a>	Director Operations	<a href="#">Smallville Resources Inc</a>
 <a href="#">Robin Jernigan</a>	Director Operations	<a href="#">Income Free Investing LP</a>
 <a href="#">Deanne Klopp</a>	VP Sales	<a href="#">Q,R.&amp;E. Corp</a>
 <a href="#">Kristin Schaal</a>	VP Sales	<a href="#">Trait Institute Inc</a>
 <a href="#">Rene Mccaleb</a>	Director Sales	<a href="#">MMM Mortuary Corp</a>
 <a href="#">Elnora Storch</a>	Director Sales	<a href="#">P Piper &amp; Sons</a>

- On Accounts and Contacts the pencil opens in Edit View
- Only use the pencil when you know you want to change a record
- Click on the Contact Name to access Detail View and see the history on the subpanels without the ability to edit

Assigned to:

patrick



# Autocomplete Fields – Similar to drop downs

Account Search

Name	Type
<input type="text"/>	Analyst Competitor Customer Integrator Investor
Industry	Billing City
Apparel Banking Biotechnology Chemicals Communications	<input type="text"/>
Billing Country	Billing State
<input type="text"/>	<input type="text"/>
	Any Email
	<input type="text"/>

Type a couple of letters



If does not work use the arrow button



Can search by name, city, state, email



Create a new record if not found



# Search and Shortcuts

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Concepts to know to use the CRM



# Finding an Account

 Use the Search magnifying glass in top menu

 Enter last name and click Search

 Click on match

 Any field is searchable including Account Name, Contact Name, Email Address

Use Basic Search

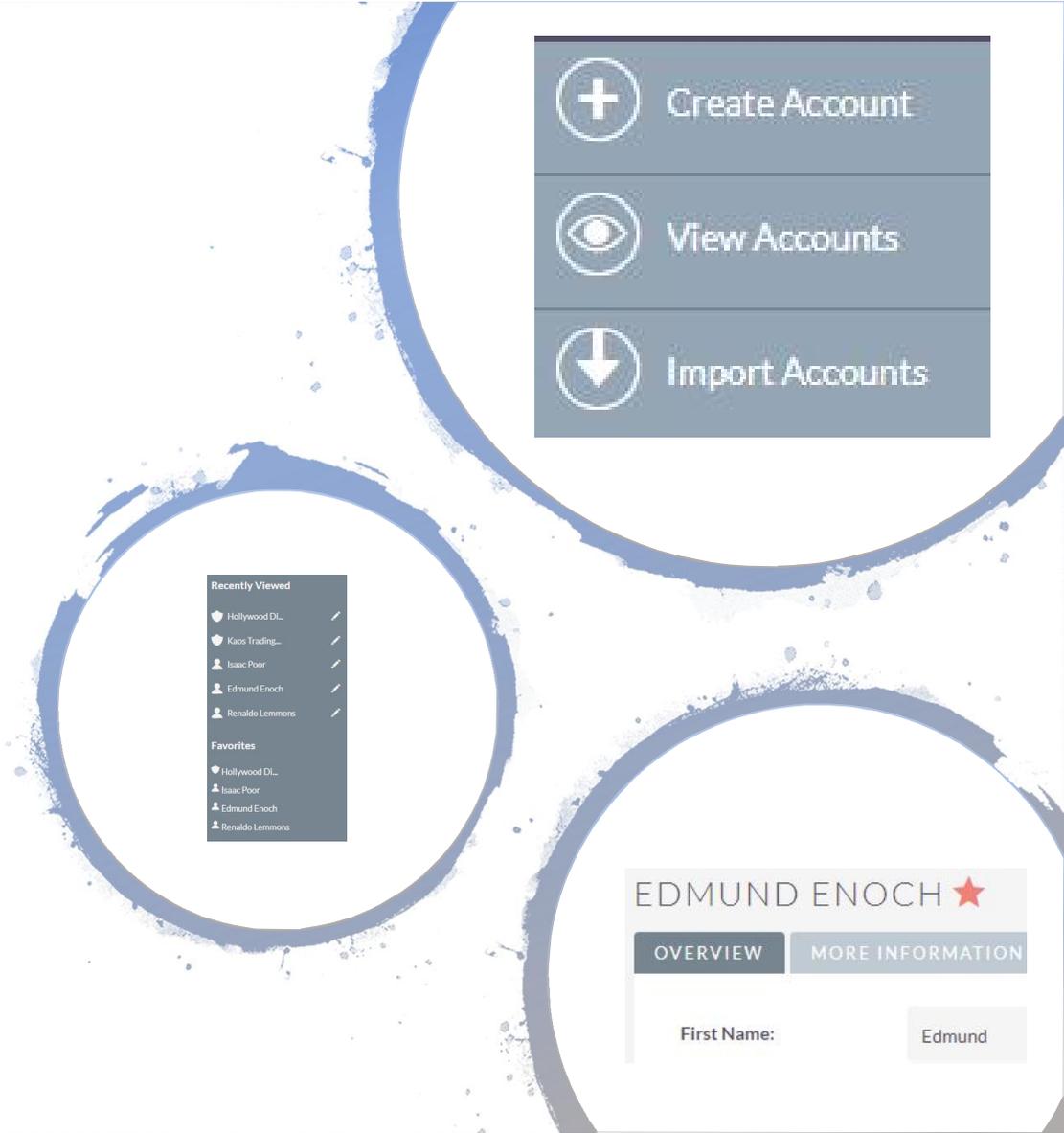
Module	Name	Summary	Date Created
Accounts	MTM Investment Bank F S B	Santa Fe    USA    (795) 103-3843    max    info57@example.de	10/07/2020 18:2
Accounts	MTM Investment Bank F S B	Kansas City    USA    (124) 808-9402    sally    the.info@example.co.uk	10/07/2020 18:2
Opportunities	MTM Investment Bank F S B - 1000 units	MTM Investment Bank F S B    Closed Won    50000    01/13/2020    max	10/07/2020 18:2

# Navigation Panel on Left

✓ Options change based on module

☞ It will show recent access records

🏠 Contacts and Accounts marked as favorites using Star Icon in Detail View



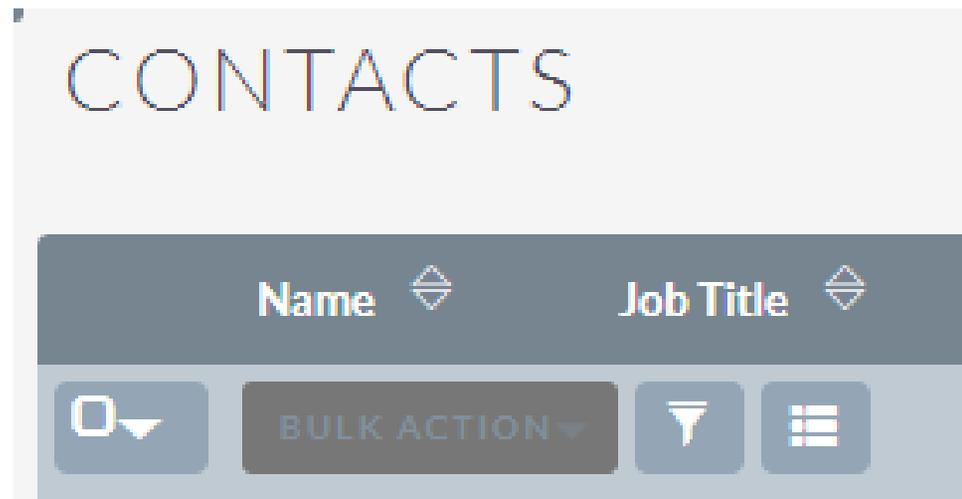
## Change Columns Shown in List View

- In Contact view click the column chooser
- Replace Office Phone with Mobile Phone

### CHOOSE COLUMNS

#### DISPLAYED

Name
Job Title
Account Name
Email
Mobile
User
Date Created



# Use Filters In List View

- In Contact view click the column chooser
- You can view items assigned to you
- You can Show Just Contacts in a certain Quadrant

## FILTER

Quick Filter

Advanced Filter

Name

Contact Type

Donor Target  
Donor  
Volunteer Public  
Volunteer Committee  
Board Member  
Other

Quadrant

Unassigned  
Does Not Apply  
NE  
SE  
SW  
NW

Contact Friends Neighbor

Write Letter

## CONTACTS

Name



Job Title



BULK ACTION



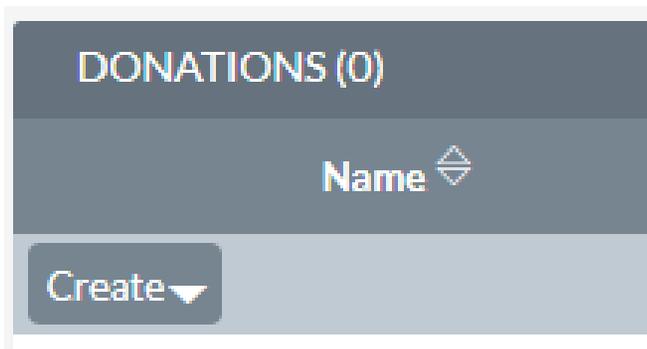
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A large, dark blue ink splatter graphic with a rough, irregular edge, centered on a white background. The splatter has a textured, watercolor-like appearance with some lighter blue and white areas around the main dark blue shape.

# Entering Donations

## Donations are added to Contacts

This will speed data entry and increase accuracy as well as maintain connections.



Use Search to find a Donor



On a Donor > Donation subpanel  
> Create



Populate the donation Quick  
Entry Form

# Add Donation to a Donor

Find Contact (or Account)  
with Search

Open record by clicking on  
the name

Expand Donations subpanel

Click Create

Populate the form and click  
save

DONATIONS (0)

SAVE

CANCEL

FULL FORM

BASIC

Amount:\*

Donation Date:\*

12/07/2020



Donation  
Designatio:\*

GeneralFund

Name:\*

Donation

Donation Type:\*

Check

Next Date:

12/07/2021



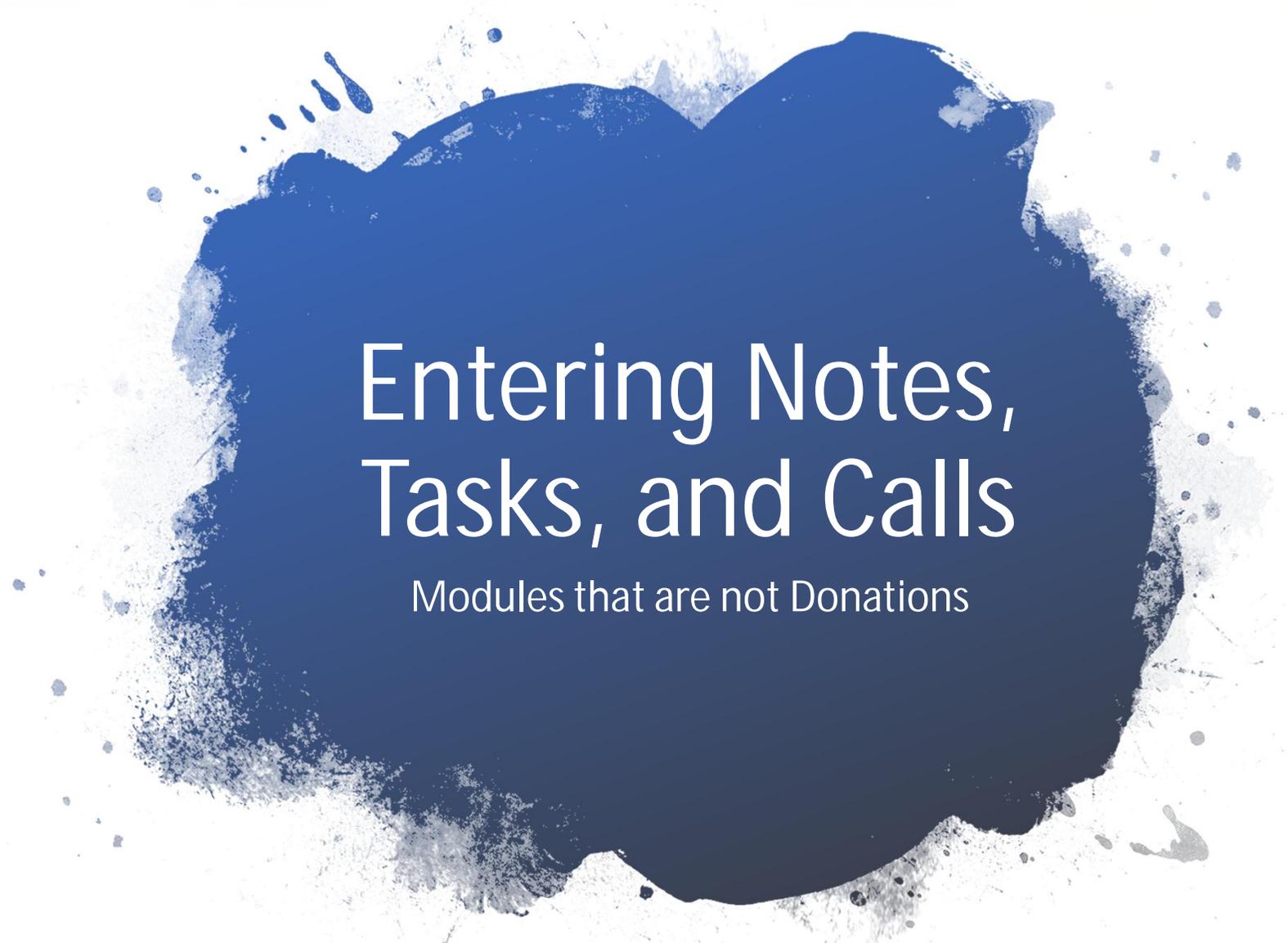
Expect Repeat:

Assigned to:

Janice Fidishun



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# Entering Notes, Tasks, and Calls

Modules that are not Donations

## Always start with an Account or Contact

This will speed data entry and increase accuracy as well as maintain connections.



Use Search to find Account or Contact



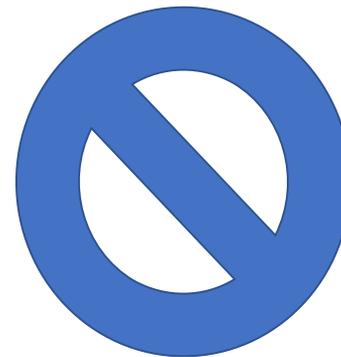
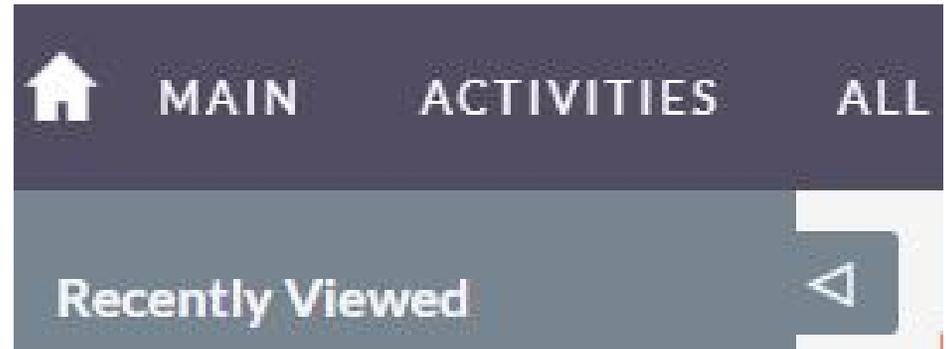
On an Account > Contact subpanel > Create



Switch to the Contact > Activity subpanel > Log Call  
(Sometimes History subpanel)

Navigate using  
Search to find  
contact

You will rarely use Menu



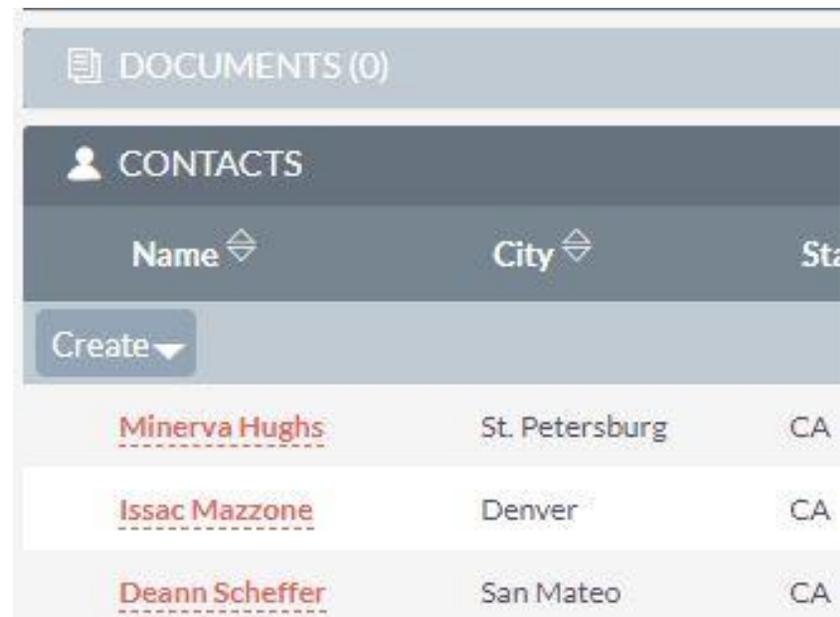
# Add Contacts to Accounts

Find account with Search or list of accounts

Open account by clicking on the name

Expand Contacts subpanel

Click Create



The screenshot shows a software interface with a 'CONTACTS' subpanel. At the top of the subpanel is a 'DOCUMENTS (0)' section. Below it is the 'CONTACTS' section, which includes a 'Name' column, a 'City' column, and a 'State' column. A 'Create' button is visible on the left side of the table. The table contains three rows of contact information:

Name	City	State
<a href="#">Minerva Hughs</a>	St. Petersburg	CA
<a href="#">Issac Mazzone</a>	Denver	CA
<a href="#">Deann Scheffer</a>	San Mateo	CA

# Add Contacts to Accounts – Input Form

Account Name will automatically populate

Enter Name, Title, Phone Number, Email and Type

Click Save

First Name:	<input type="text" value="Blake"/>	Account Name:	<input type="text" value="WORLD PRINTING, LLC."/>
Last Name:*	<input type="text" value="Grey"/>	Office Phone:	<input type="text" value="937-876-1234"/>
Job Title:	<input type="text" value="Purchasing Manager"/>	Mobile:	<input type="text" value="937-321-1287"/>
Fax:	<input type="text"/>	Do Not Call:	<input type="checkbox"/>
Email Address:	<input type="text" value="Blake.Grey@wpllc.c"/> <input type="radio"/> Primary <input type="checkbox"/> Opted Out <input type="checkbox"/> Invalid	Lead Source:	<input type="text" value="Other"/>
Assigned to:	<input type="text" value="Patrick Arehart"/>		

# Adding Notes - Open Account or Contact First

The screenshot shows a form for adding notes. On the left, there is a search bar containing "John Lewis" with a magnifying glass icon and a red "x" icon. Below it is an empty search bar. At the bottom left, there is a "Choose File" button and the text "No file chosen". On the right, there are two sections: "Related To:" and "Assigned to:". The "Related To:" section has a dropdown menu set to "Account" and a search bar containing "Washington Township" with a magnifying glass icon and a red "x" icon. The "Assigned to:" section has a search bar containing "Patrick Arehart" with a magnifying glass icon and a red "x" icon. Below these sections is a large, empty text area for entering the note content.

Expand History > Create Note or Attachment

Enter Subject (short but descriptive, helps find information later) and note

You can add an attachment

This is one way to log an email

# When to use the Notes Module



Use if nothing else makes sense; it is not a meeting, not a phone call, not a task



Can be used to store documents as well as notes.



Information you and others could use



Already completed tasks



Email logging



Anything you want, space is not an issue.

# Tasks - Open Account or Contact First



Expand Activities > Create Task



Enter Subject (short but descriptive, helps find information later)



Enter a Due Date and a Start Date



Set the priority



Change the "Assigned to:" if appropriate



Enter Description

Subject:\*

Status:\*

Start Date:

  
 :  : 

*mm/dd/yyyy 11:00pm*

Related to:

WORLD PRINTING, LLC.



Due Date:

  
 :  : 

*mm/dd/yyyy 11:00pm*

Contact Name:



Priority:\*

Assigned to:



Description:

# Task Input Form

Subject:\*

Order 983231 Must SHIP!

Status:\*

Not Started

Start Date:

  
 :

mm/dd/yyyy11:00pm

Related to:

Account

WORLD PRINTING, LLC.



Due Date:

11/09/2020   
02 : 00 pm

mm/dd/yyyy11:00pm

Contact Name:

Amanda Ealey



Priority:\*

High

Assigned to:

parehart



Description:

This is a replacement order for our mistake.

Task Input  
Form -  
Populated

# Uses for Tasks



Anything you need to do and want on your dashboard



Book event space



Send thank you note



Complete expense report



Create Blog Entry



Send invitations

## Updating or Closing a Task

MY OPEN TASKS						
Close	Subject	Related to	Priority	Status	Start Date	Due Date
X	follow up on sample pkg	BLOCH PRINTING COMPANY	High	Not Started	11/17/2020 11:00	
X	courtesy call	WILLIAMSBURG PRESS	Medium	In Progress	11/03/2020 11:00	

- Status: Not Started, In Progress, Completed, Pending Input, Deferred
- From Dashboard you can click the X to indicate Completed
- Very important to keep your task list clean

# Email Notifications



You will get an email if a task is assigned to you.



You can use the link to get directly to the task

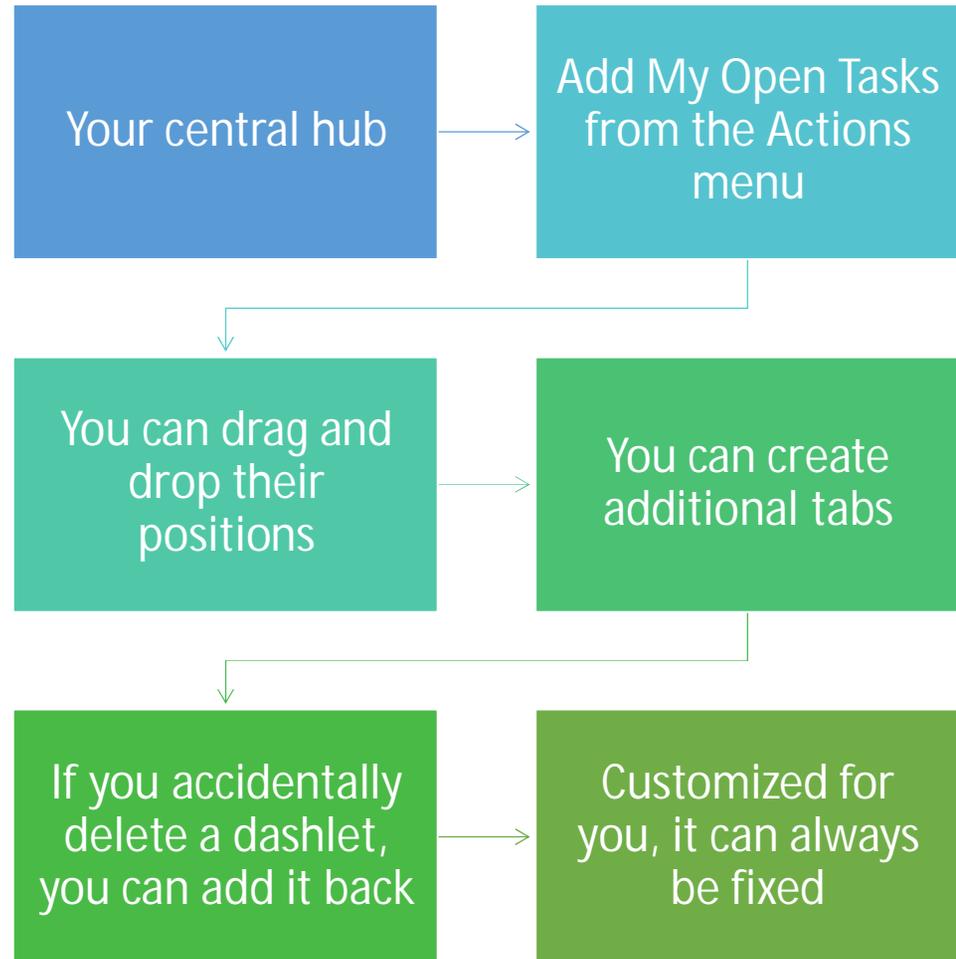


Periodically check your dashboard for open tasks



Other notifications are sent when you are assigned calls, cases, accounts or contacts

# Dashboard



# Dashboard - Example

SUITECRM DASHBOARD | Emails | ACTIONS ▾

### MY CALLS

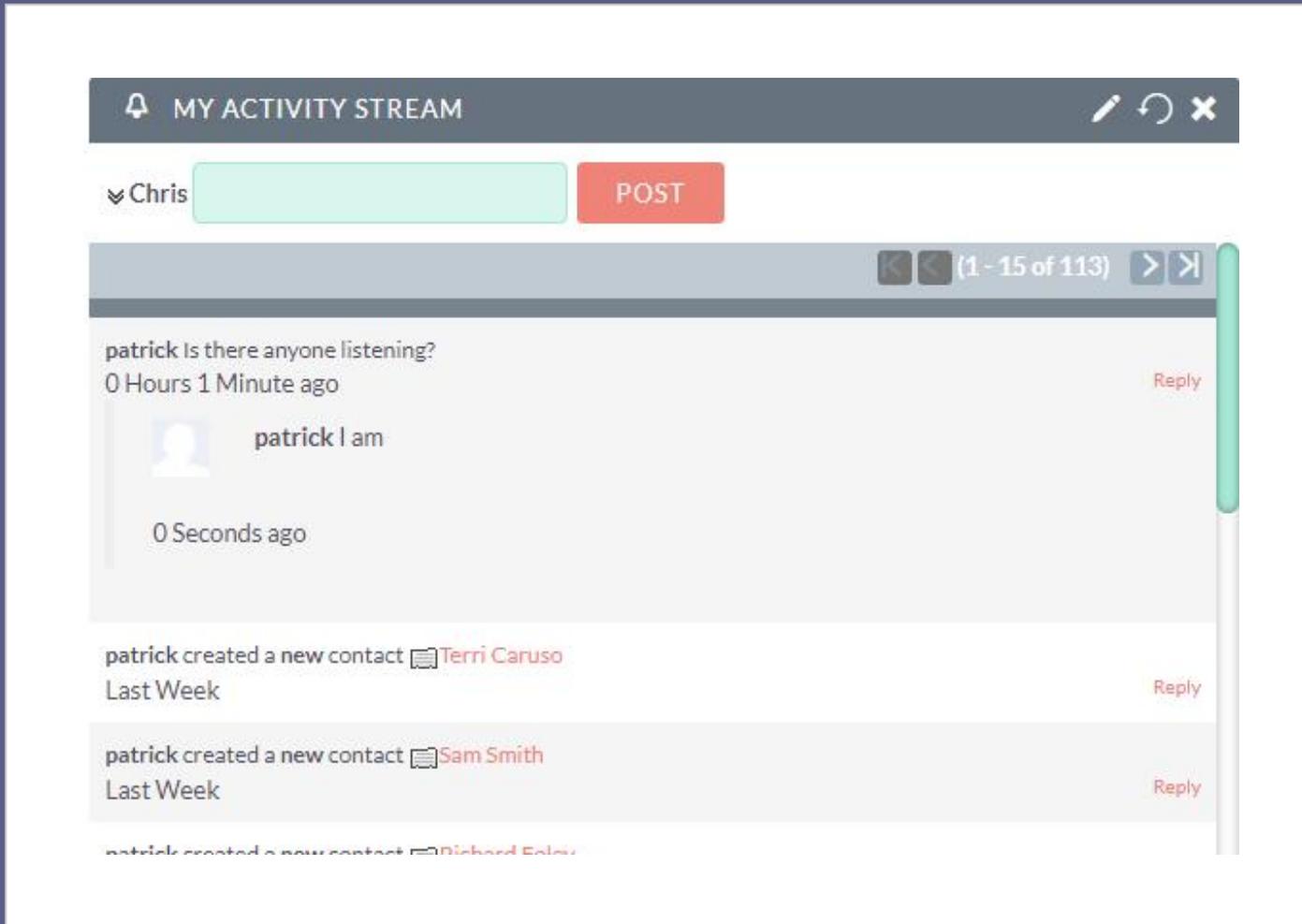
(1 - 5 of 12)

Close	Subject	Related to	Start Date	Accept?	Status	
X	Get more information on the proposed deal	MMM Mortuary Corp	02/14/2021 09:30	Accepted	Planned	 
X	Left a message	B.C. Investing International	02/23/2021 01:00	Accepted	Planned	 
X	Get more information on the proposed deal	B.H. Edwards Inc	08/26/2021 05:45	Accepted	Planned	 
X	Left a message	Income Free Investing LP	10/07/2020 10:00	Accepted	Planned	 
X	Left a message	JBC Banking Inc	10/17/2020 02:30	Accepted	Planned	 

### MY MEETINGS

(1 - 5 of 15)

Close	Subject	Related to	Start Date	Accept?	
X	Demo	Hammer Group Inc	08/08/2021 04:00	Accepted	 
X	Demo	MMM Mortuary Corp	04/07/2021 12:00	Accepted	 
X	Review needs	NW Bridge Construction	11/30/2020 02:00	Accepted	 
X	Initial discussion	JBC Banking Inc	05/07/2021 06:00	Accepted	 



# My Activity Stream – Chat board

# Using View Summary for an Account or Contact



Open a record using detail view



Open the History subpanel



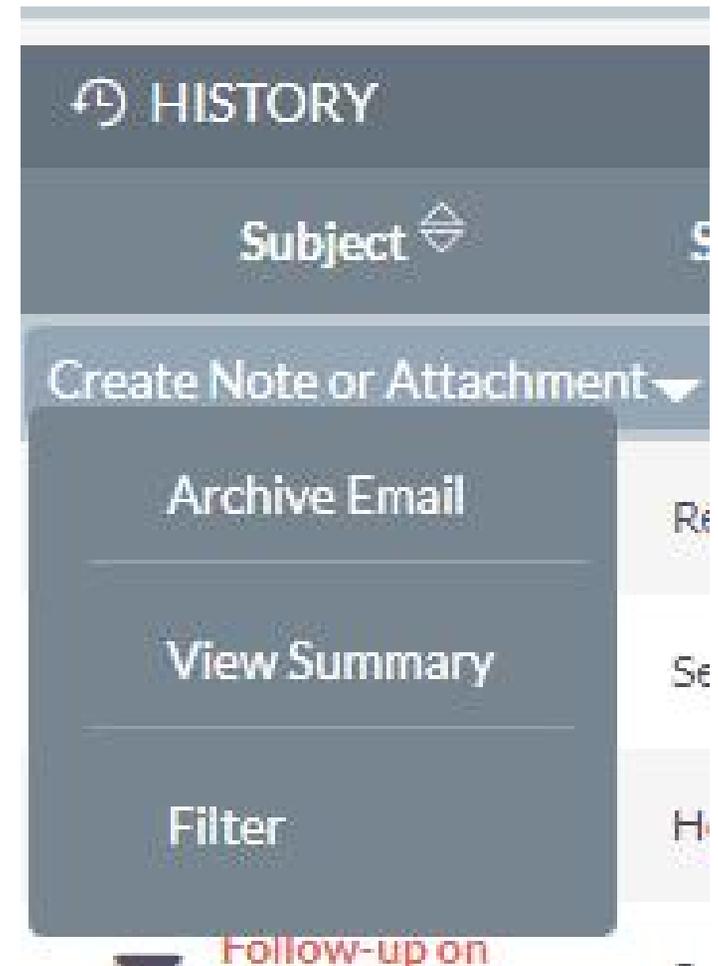
Click the arrow next to "Create Note or Attachment"



Click View Summary



See overview, or just meetings, notes, emails etc.



# View Summary

- View all or by record type
- Option to print
- Faster than opening every record one at a time

## MARCELLUS WILHITE



OVERVIEW

TASKS

MEETINGS

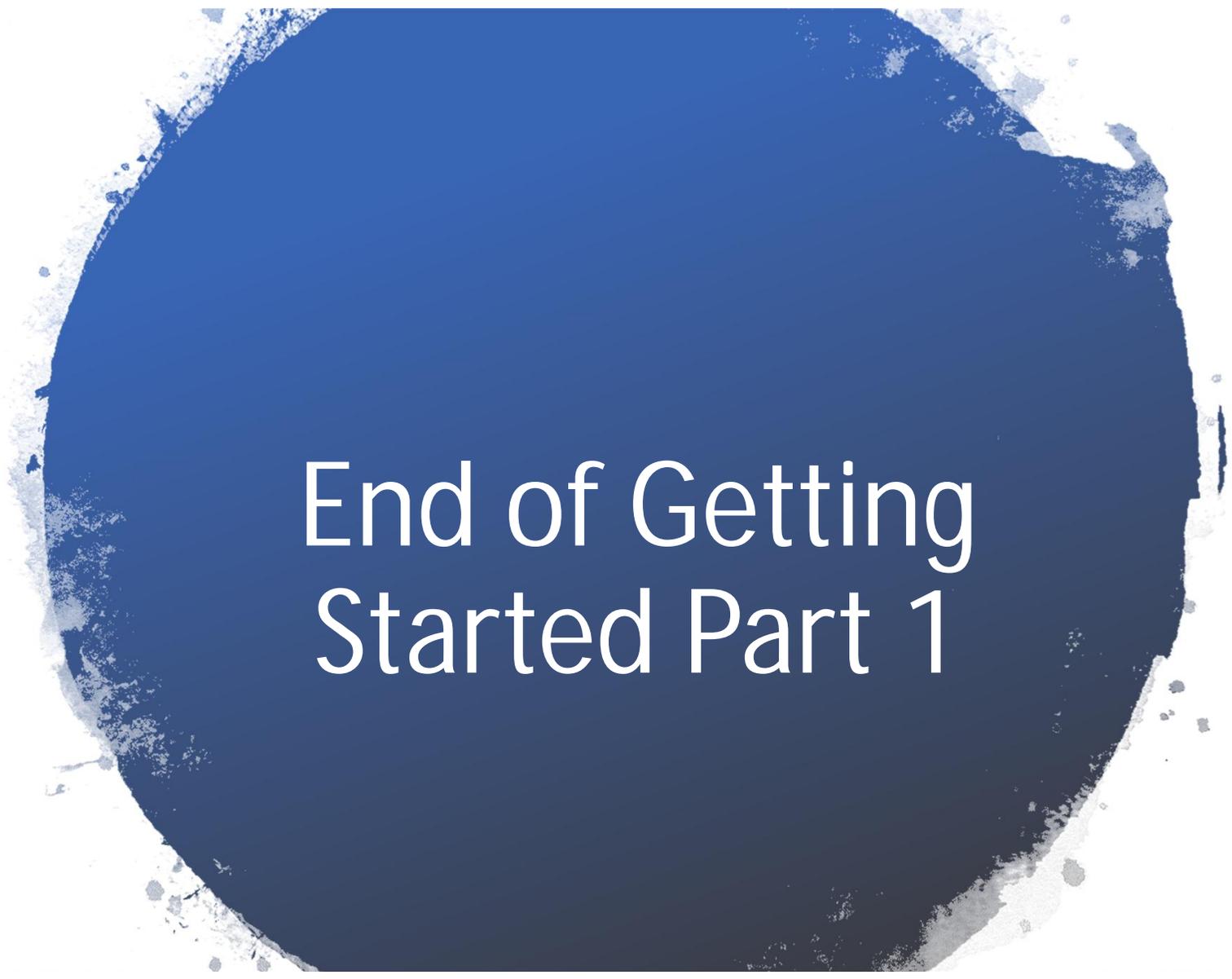
CALLS

EMAILS

NOTES

Subject	Status	Contact	Date
 Send a letter	Task Completed	Marcellus Wilhite	01/30/2021 09:45am
 Discuss pricing	Email	Marcellus Wilhite	Sent: 10/07/2020 06:21pm
Meeting to discuss project plan and hash out the details of implementation			

-  Should go to Sent Items instead of Sent, 1348, 10/25/2020 Email  
Peace Font
-  Subject 1045 10/22/2020 Email  
Font Family
-  Subject 1045 10/22/2020 Email  
Font Family
-  Subject 1045 10/22/2020 Email  
Font Family
-  Subject goes here 1323 10/21/2020 Email  
Font Family says hello to the Bolds.
-  Subject goes here 1323 10/21/2020 Email  
Font Family says hello to the Bolds.
-  Subject sent at 1320 on 10/21/2020 Email  
Font Family says hello to the Formats.
-  Should go to Sent Items instead of Sent, 1348, 10/25/2020 Email



End of Getting  
Started Part 1

# Getting Started



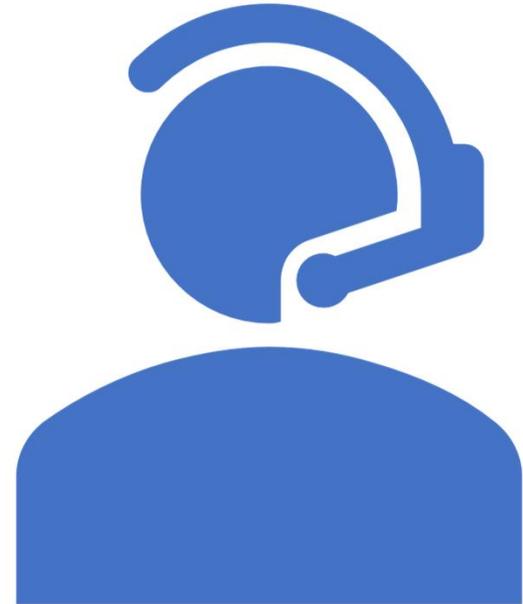
Part 2: Logging and Scheduling Calls

Log incoming, outgoing, scheduled calls.

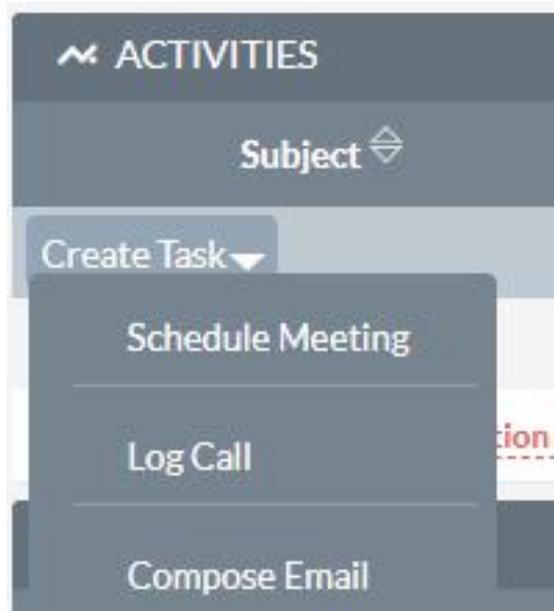
How to close.

How to use reschedule function.

# Logging Phone Calls



# Logging Calls



- Sales > Contacts > Select Contact > Activities > + > Down Arrow > Log Call
- You can log current calls or setup calls in the future
- Enter Subject (short but descriptive, helps find information later, VERY IMPORTANT)
- Mark the call as Inbound/Outbound and planned, held, not held
- Set the date, time and duration
- Enter Description
- Use "Full Form" if want to enable reminders

## Logging a Call – Input Form

“Related to” will already be prepopulated. It will be related to Account and behind the scenes the contact will be added as well.

- Was the call inbound or outbound?
- Did the call happen?
- Change “Planned” to “Held”

Subject:*	<input type="text"/>	Status:*	<input type="text" value="Inbound"/>	<input type="text" value="Planned"/>
Start Date & Time:*	<input type="text" value="11/07/2020"/> 	Related to:	<input type="text" value="Account"/>	
	<input type="text" value="02"/> <input type="text" value="45"/> <input type="text" value="pm"/>		<input type="text" value="Inskeep Printing"/>  	
Duration:*	<input type="text" value="0"/> <input type="text" value="15"/> (hours/minutes)	Reminders:	<input type="button" value="+ Add reminder"/>	
Assigned to:	<input type="text" value="parehart"/>  			
Description:	<input type="text"/>			

# Saving the call

Information for you and others to refer to later about the calls you make.

- Enter subject - this is very important
- In this case, Outbound and Held are chosen
- Add a description of the discussion
- Include specifics like package was sent or follow up email was sent

<b>Subject:*</b>	<input type="text" value="Courtesy call - custom caps"/>	<b>Status:*</b>	<input type="text" value="Outbound"/> <input type="text" value="Held"/>
<b>Start Date &amp; Time:*</b>	<input type="text" value="11/07/2020"/> 	<b>Related to:</b>	<input type="text" value="Account"/> 
	<input type="text" value="02"/> <input type="text" value="45"/> <input type="text" value="pm"/>		<input type="text" value="Inskeep Printing"/>  
<b>Duration:*</b>	<input type="text" value="0"/> <input type="text" value="15"/> (hours/minutes)	<b>Reminders:</b>	<input type="button" value="+ Add reminder"/>
<b>Assigned to:</b>	<input type="text" value="parehart"/>  		
<b>Description:</b>	<input type="text" value="Contact is interested. Send sample packages."/>		

# Logging Calls – Subject Line Examples

Donor?

Volunteer?

Reminder  
about  
Volunteer task

Review Needs

Introduce  
Players

# Closing a call



If a call is "Planned" then it is an open task



If you had a conversation with contact, then "Held"



If the call did not occur, reschedule it, not close



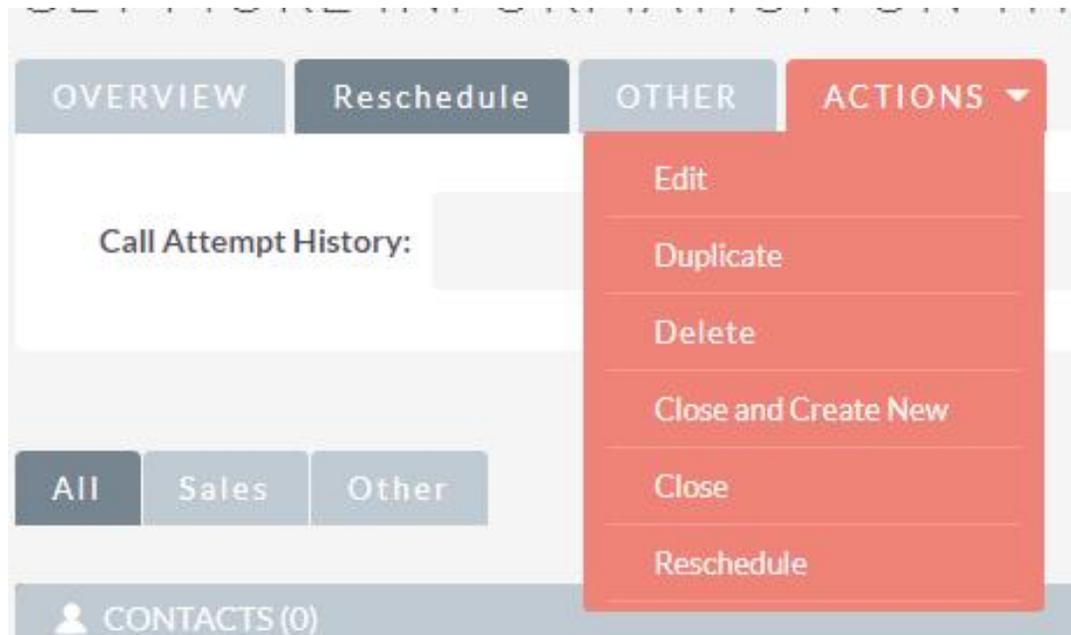
If you give up, mark the call as "Not Held" and do not delete

<input type="checkbox"/>		Outbound	Get more information on the proposed deal	<u>Kaos Trading Ltd</u>
<input type="checkbox"/>		Outbound	Get more information on the proposed deal	<u>MTM Investment Bank F S B</u>
<input type="checkbox"/>		Outbound	Bad time, will call back	<u>Nelson Inc</u>
<input type="checkbox"/>		Outbound	Bad time, will call back	<u>AtoZ Co Ltd</u>
<input type="checkbox"/>		Outbound	Get more information on the proposed deal	<u>TJ O'Rourke Inc</u>

## List of Calls

An X indicates the call has not been closed

# Reschedule a Call – Planning later attempt



- Leave call open
- Use Actions menu to Reschedule
- Reschedule tab will log previous call attempts