QikBiz CRM

User Guide

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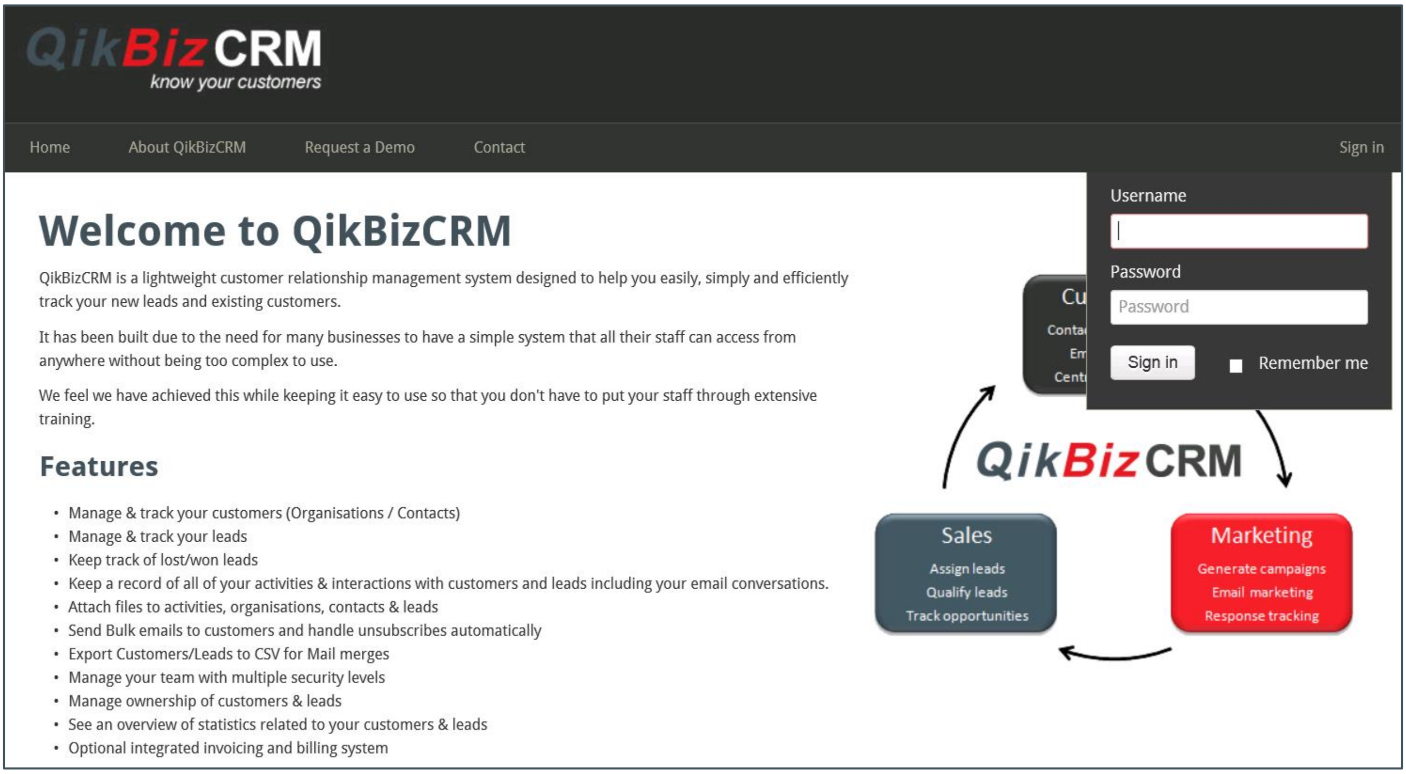
Getting Started

To sign in to QikBiz CRM visit www.qikbizcrm.co.nz.

Click the Sign In link in the top right of the page and a box will appear for you to enter your Username and Password.



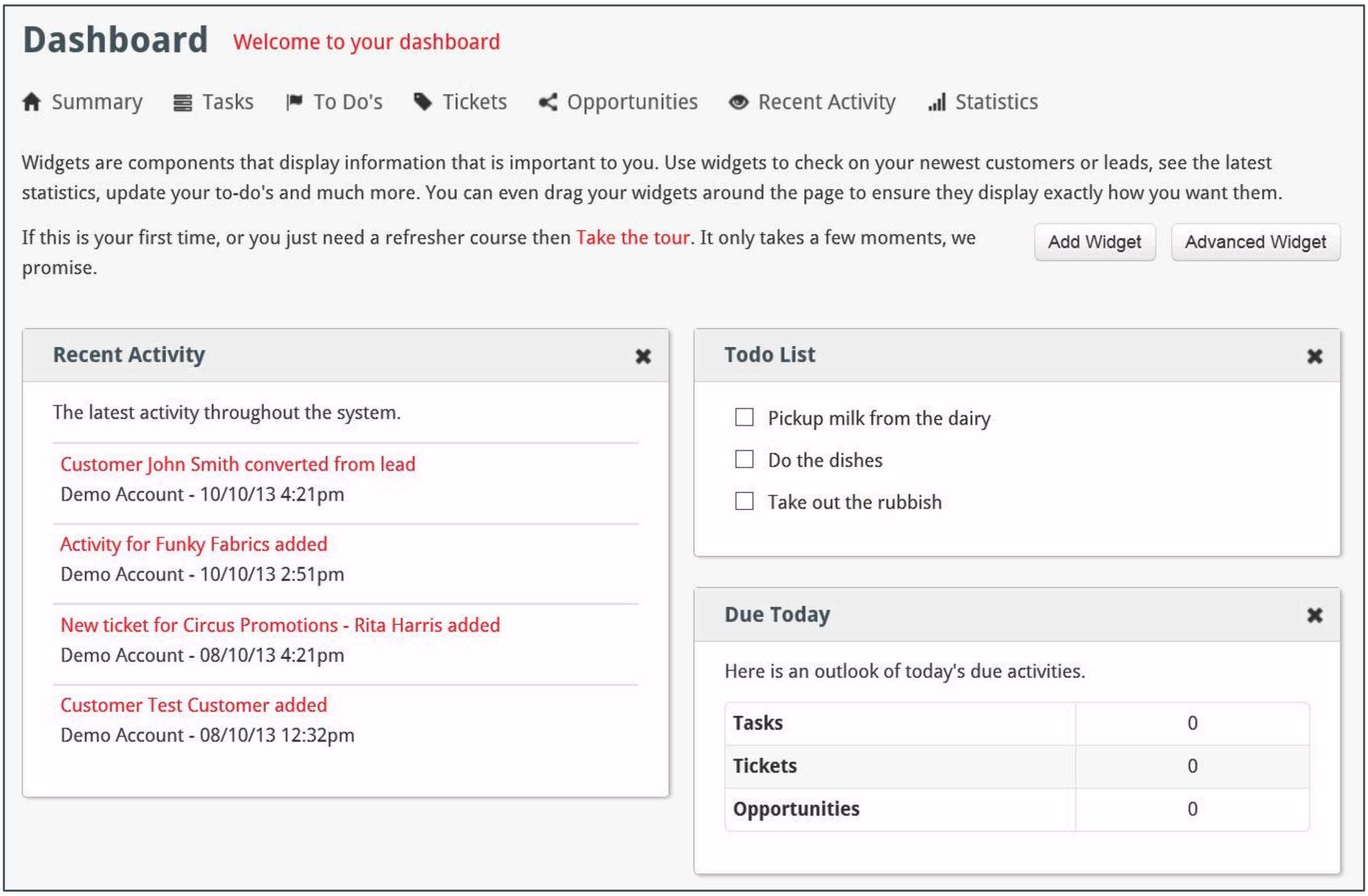
Once you have signed in you will be taken to your Dashboard.

Dashboard

The first page CRM users will see once they log in is the Dashboard.

Each user can customise their Dashboard with Widgets, displaying information such as tasks due today, their to do list and recent activity.

Customised widgets can be made to display information unique to the users role in your business, by clicking the 'Advanced Widget' button.



Customers & Contacts

In QikBiz CRM you have the ability to extensively manage your Customers.

- Store files specifically related to them such as an agreement document.
- Perform Activities that will allow you to keep track of what needs to be done for this Customer (and the Contacts under it).
- Assign a Tag to individual Customers to allow you to easily identify groups of Customers.
- Manage support Tickets related to a specific Customer's Contact and keep all history of support Tickets available for viewing.
- View invoices this Organisation has accumulated (including due dates, paid statuses, etc.).
- Manage recurring charges for this Customer.

Create a New Customer

Here are the steps to create a new Customer that was not previously a Lead:

1. Select 'Add New' and then 'Customer' from the top menu.
2. Fill out all the relevant fields for your new customer.
3. Click 'Save Customer' when you have completed all details.
4. You can now add Tags to the customer, or select 'Contacts' in the left hand menu to add a contact to the customer.

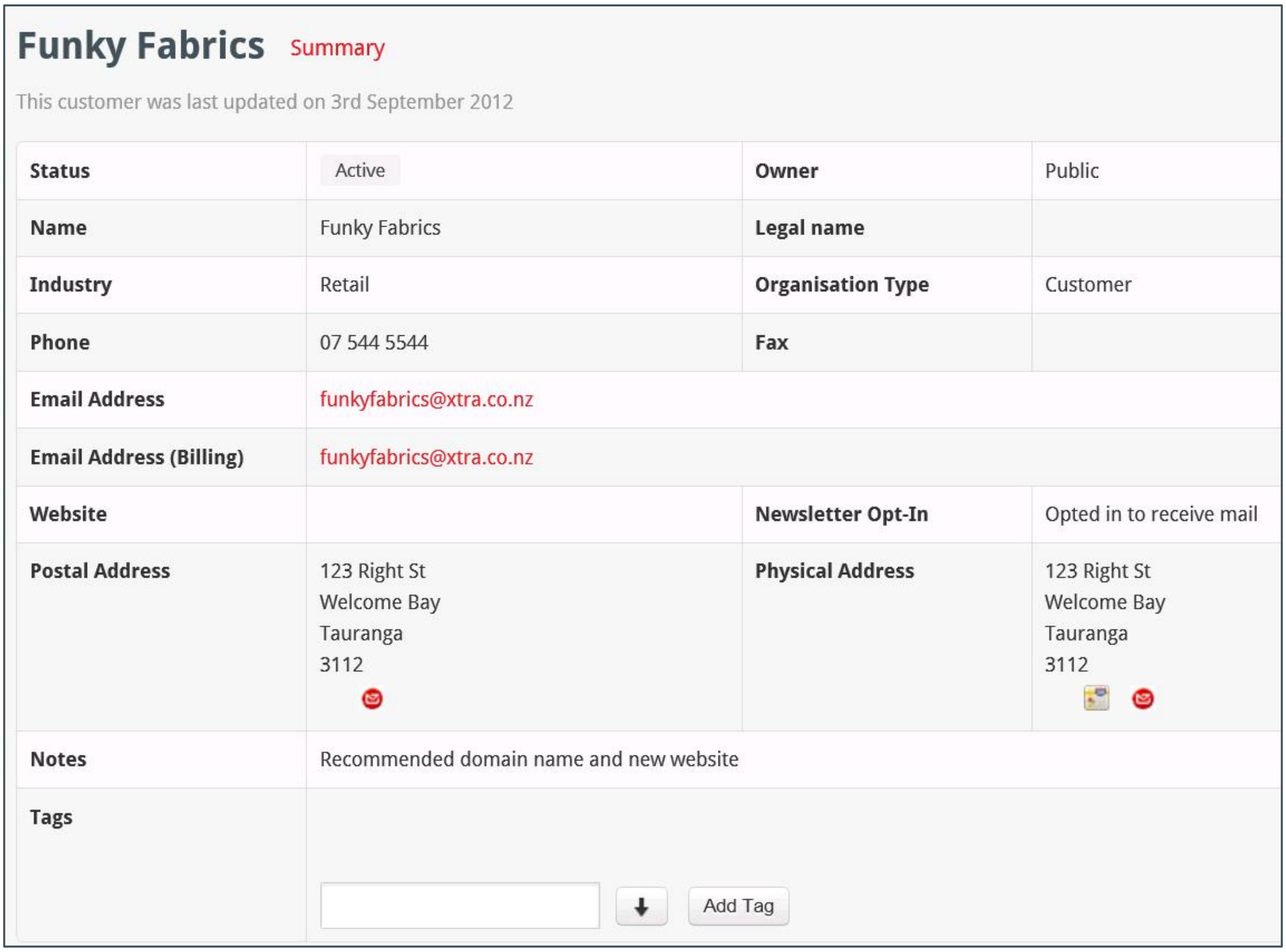
View Customers

You can find all Customers and Contacts by navigating to the **Customers** link on the top menu.

You can search for customers by using the search box, narrowing searches down by Customer, Contact or Location, by Tags, or customers that are owned by you.

Updating a Customer

Once you have found the Customer you are looking for, you can view all of their information by clicking on their name. You will be taken to a summary page for that Customer.



You can update any details on this page by selecting 'Editing' from the left menu.

There are several options in the left hand menu when viewing a Customer:

Summary

This displays a summary of information about the Customer and five most recent activities.

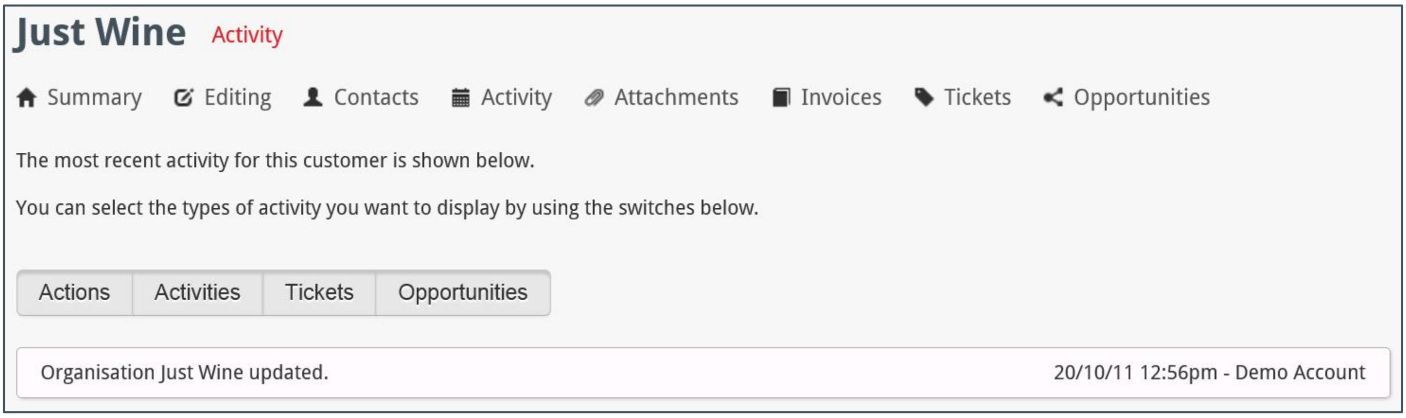
Contacts

This displays the Contacts assigned to this customer. You can view more information about each contact or add a new contact.

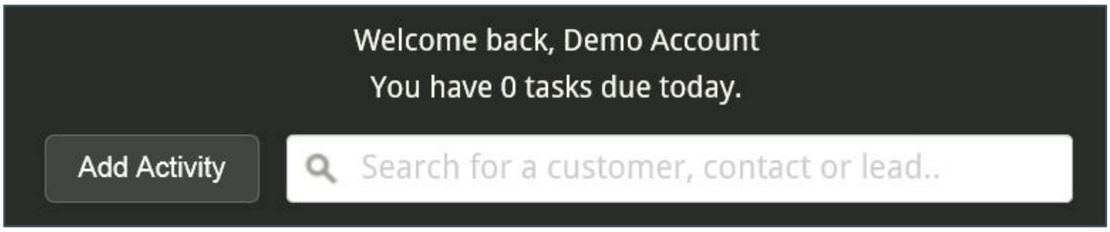
Each Contact can also hold its own Activities and attachments.

Activities

This shows all Activities for the customer. You can filter the activities by using the Actions, Activities, Tickets and Opportunities buttons.



To add a new Activity, simply click the ‘Add Activity’ button at the top of the page by the search bar.



A new activity box will pop up for you to enter details into.

The fields are:

Customer	The search box at the top lets you find the Customer the activity is for. This will automatically be selected if you are on a customer page.
Type	You can select what type of Activity this is - General, Billing, Sales, Other, or Email.
Source	You can select how this Activity will be performed - Phone, Web, In Person, Other or Email.
Memo/Description	Enter the details of the Activity.
Assign to	Who you want to assign this Activity to, the user selected will be responsible for the completion of this Activity. This field is optional.
Date	You can choose to put a date in for when you want this Activity to be completed.
Save Reminder	If you check the Save Reminder box and Outlook reminder will download for you.
Attach a File	You can choose to attach a file.

From the Activities tab you can also edit an existing Activity, providing it is either not completed, or doesn’t have a comment yet. Simply click the ‘edit’ link in the bottom left corner of the Activity.

Attachments

Here you can see all attachments for this customer and add a new one by clicking the 'Add a New Attachment' link.

You can also download and delete attachments.

Invoices

If your CRM is linked to your invoicing software (such as Xero) you can view invoices here.

Tickets

Here you can see all support tickets for this Customer. Click on the red links to see more information about that ticket, or create a new one by clicking the 'Add a New Ticket' link.

See the Ticket section for more information on Tickets.

Funky Fabrics Support Tickets

Support Tickets related to this customer are shown below. Add a New Ticket

There are **1 support tickets** awaiting completion.

#	Subject	Category	Status	Assignee	Created	Due	Priority
111	Service scooter	Support	Assigned	Demo A	03/09/2012		

Opportunities

Here you can view all Opportunities, including closed ones, and add new Opportunities.

Funky Fabrics Opportunities

Opportunities related to this customer are shown below. Add a New Opportunity

There are **2 opportunities** awaiting completion.

#	Name	Status	Probability	Potential Value	Assignee	Created	Due
50	6-mth service	Potential	Unknown	$200		03/09/2012	
49	6-mth service	Potential	Unknown	$200		03/09/2012	04/03/13

Closed Opportunities

There are **1 opportunities** already completed.

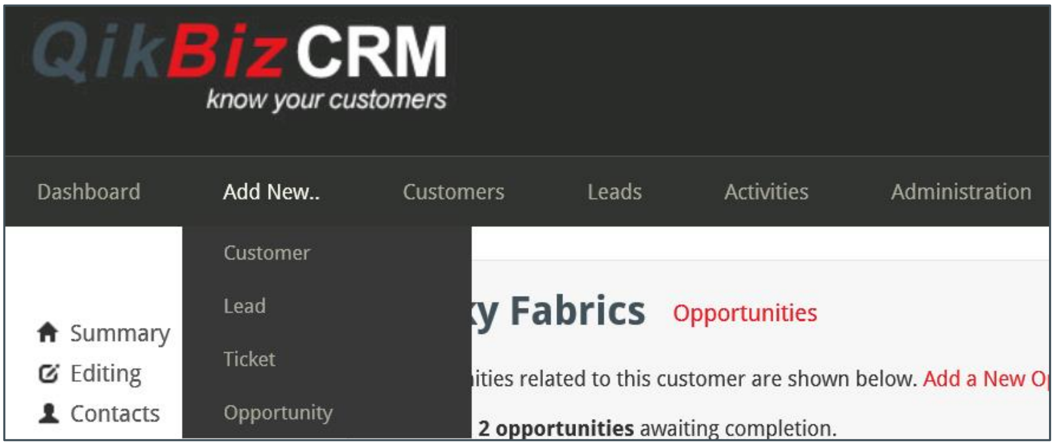
#	Name	Status	Probability	Potential Value	Assignee	Closed	Due
48	Mobility scooter	Billed - Closed	%	$3000	Demo A	03/09/2012	24/09/12

Leads & Opportunities Management

In QikBiz CRM you have the ability to extensively manage sales Leads and Opportunities.

Existing Customers

To create an opportunity for an existing customer, go to 'Add New' in the top menu, and then select Opportunity from the drop down. You will then be able to enter information about your opportunity.



Potential Customers

To create an opportunity for a potential customer, first you must create a Lead. To do this, go to 'Add New' in the top menu, and select Lead from the drop down. You will then be able to enter all the details about the new Lead.

Once you have saved your Lead, you can create an Opportunity for this Lead by selecting 'Opportunities' in the left hand menu.

Click 'Add a New Opportunity', and then you will be able to enter details about this Opportunity.

Opportunity Fields

Name	Name of Opportunity, eg. 'New Website'.
Details	This is where you enter your information about the Opportunity.
Probability	This is where you can enter a percentage that represents the probability of converting this lead into a customer (through this opportunity).
Potential Value	Enter the potential dollar value of this Opportunity.
Tags	Choose one or more tags to identify and classify this Opportunity.
Status	Select the status that the Opportunity is at currently (Not Contacted, Contacted, Proposal, Qualified, Postponed, Lost).
Assigned to	Choose who is managing this Opportunity.
Expected Revenue Date	Enter the expected revenue date for this Opportunity.
Due Date	Enter the date that you will follow up on this Opportunity.
Notification Settings	You can enter the people you want to notify about this Opportunity.

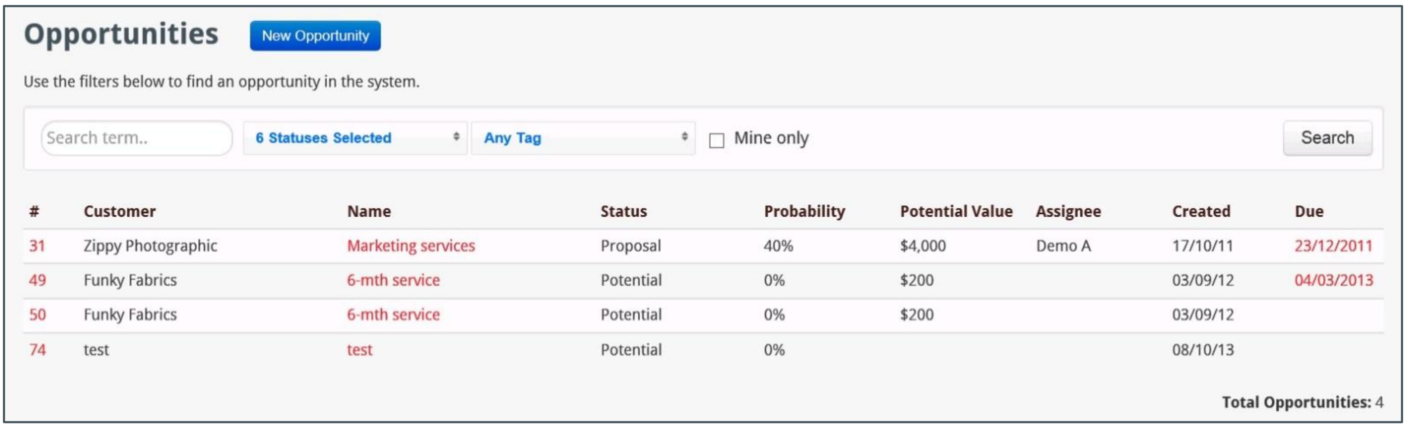
View Opportunities

Viewing Opportunities Assigned to You

You can view your Opportunities by using the Opportunities link in the left hand menu from the Dashboard.

Viewing All Opportunities

To view all Opportunities, go to 'Activities' then 'Opportunities' in the top menu. This will give you an overview of all open Opportunities, and you can narrow Opportunities down by using a search term or the statuses and tags options.



Updating an Opportunity

You can update an Opportunity by viewing the Opportunity, and clicking 'Editing' in the left menu. Once you have made your changes click the 'Update Opportunity' button at the bottom to save your changes.

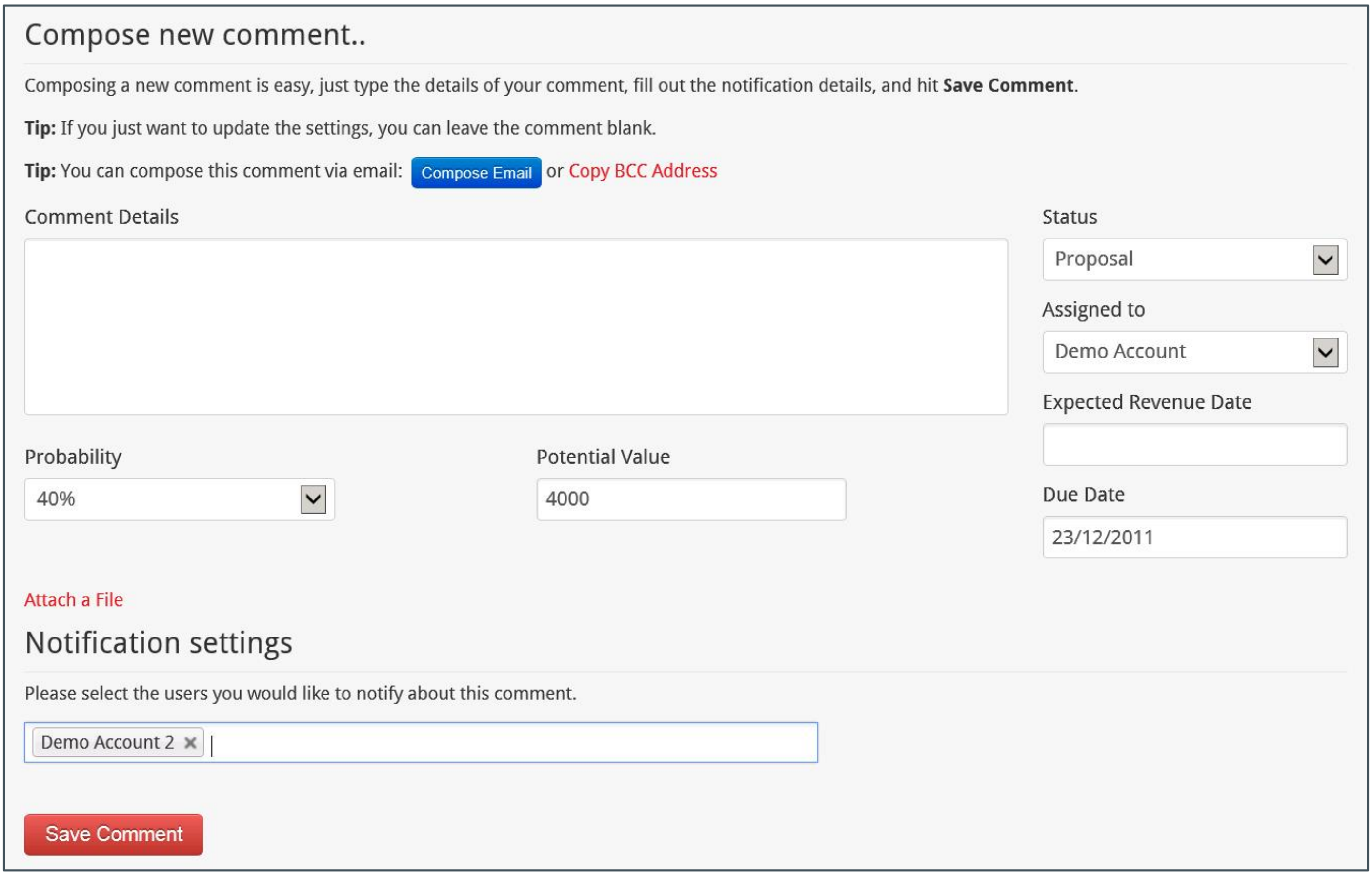
Adding Comments to an Opportunity

From the main page of your Opportunity you can add comments about the Opportunity or compose an email that will be saved against the Opportunity.

To write a comment, eg. 'John called and said he would read the quote and get back to us.' Simply type it in to the comment details box and click save comment. You can also choose to select other users that will be notified about this comment, or attach a file (like a PDF) before saving.

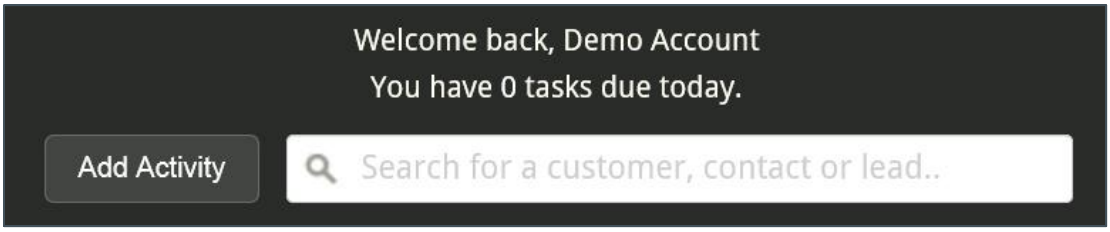
To write an email to the contact that will be saved into the CRM against that Opportunity you can either click the 'Compose Email' button or click 'Copy BCC Address'. You can then write your email and send it, and it will get saved into the CRM.

If you choose 'Copy BCC Address', you can then paste it into the BCC field of your email and it will get saved into CRM.



Adding an Activity to a Lead

To add an Activity to a Lead, click the 'Add Activity' button at the top of the page beside the search bar. If you are already on a leads page, it will have auto-selected the current lead.



A box will pop up for you to enter information about your Activity. Save once you have finished.

Converting a Lead to a Customer

If you have won an opportunity, you will have the ability to choose to convert the lead into a customer automatically when updating the opportunity. Alternatively, you are able to manually convert the lead to a customer by using the 'Convert to Customer' option on the Lead's screen.

This will then bring you to a screen that asks you to confirm your choice of converting to Customer.

Upon continuing, you will be redirected to the Customer summary page. Any Activities, attachments and Tickets & Opportunities will now be associated to this Customer. Your Opportunity will remain as 'Won', and can be accessed at any time by using the search on the Opportunities page, and selecting 'Won' as the status of possible Opportunities to return.

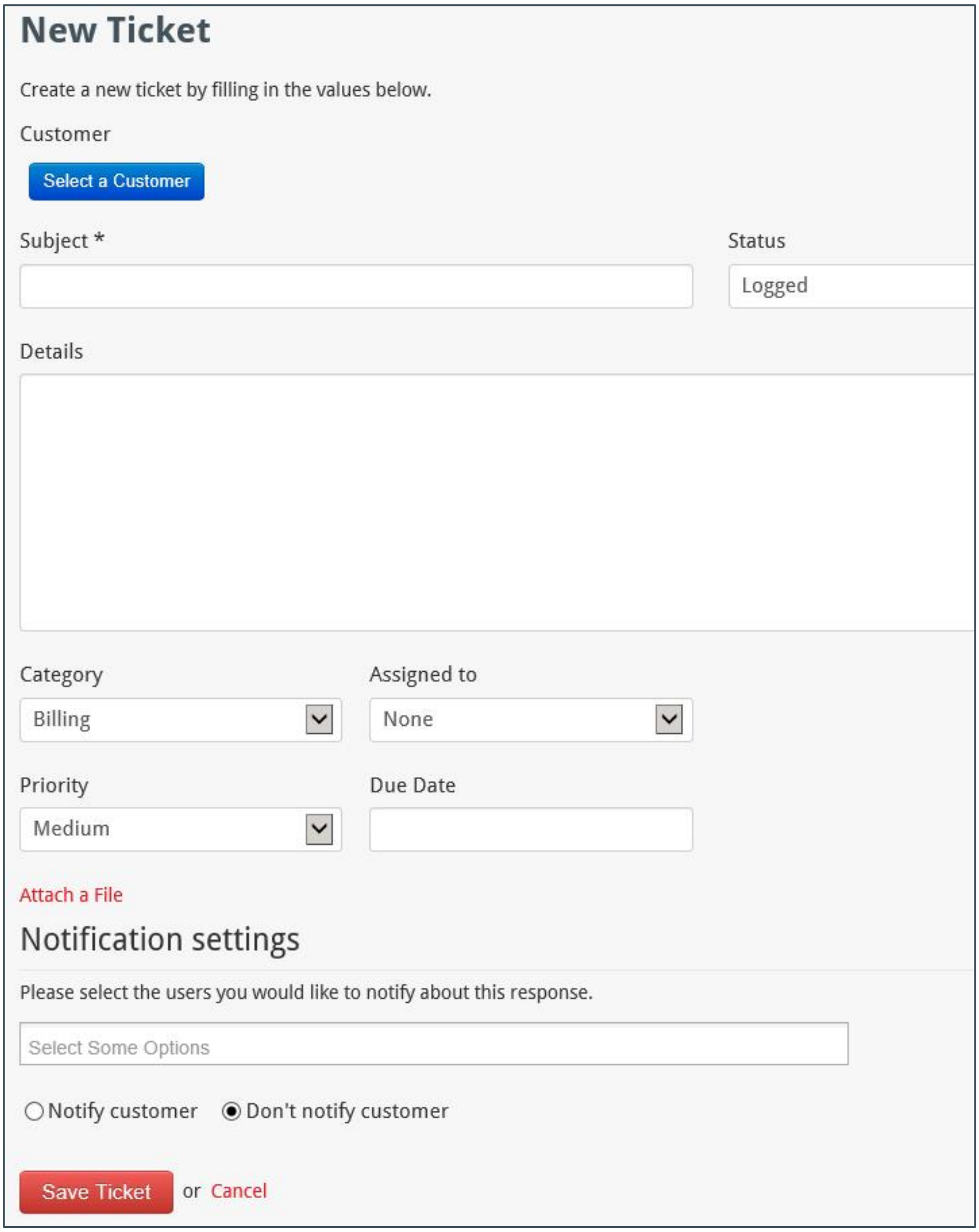
Tickets

Tickets are a powerful way to easily keep track of your Customer and Lead interactions and projects.

Creating a new Ticket

To create a new Ticket there are several options:

- By selecting 'Add New' and then 'Ticket' in the top menu.
- By selecting 'Tickets' from the left hand menu when viewing a Customer, Contact or Lead details.
- From the main Tickets page, located by selecting 'Activities' then 'Tickets' in the top menu.



The fields for creating a new Ticket are:

Customer	Choose the Customer the Ticket is assigned to.
Subject	A brief description of the Ticket.
Status	What stage the Ticket is in, e.g. Logged, Assigned, In Progress, Customer, On Hold, Closed.
Details	Details about the Ticket.
Category	What the category of the Ticket is, eg. Development, Support, Billing.
Assigned to	Who will be managing the Ticket.
Priority	The urgency of the Ticket.
Due Date	You can choose to enter a due date.
Attach a File	This link lets you attach multiple files related to the Ticket.
Notification Settings	You can choose users who you want to be notified about regarding the ticket, and whether the Customer will automatically be notified or not when the ticket is created.

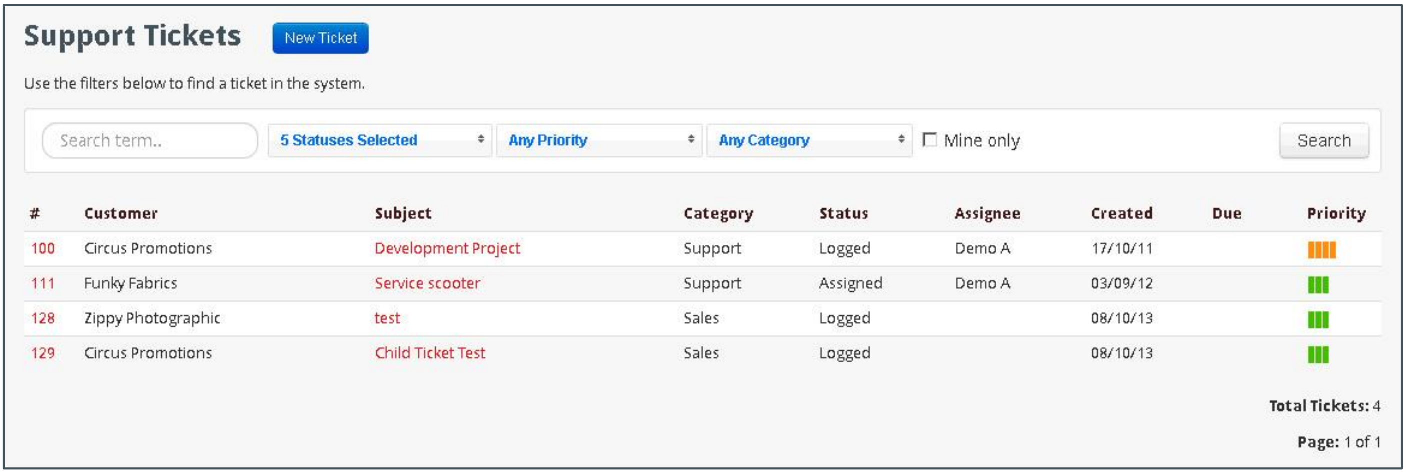
Once you save the Ticket, the users you have chosen to be notified will receive an email with details of the Ticket.

Viewing a Ticket

You can view Tickets by selecting ‘Activities’ then ‘Tickets’ in the top menu.

You can filter them using the options along the top.

To view a Ticket’s details click on the Ticket subject or number.



The view Ticket page shows all details about the Ticket. From this page you can change the status, priority and who it is assigned to (by selecting a different one in the dropdown), change the due date, view the Child Tickets of this Ticket (or the Parent Ticket, if this one is a Child), and add a new response.

To add a new response you can simply enter the details in the text area near the bottom of the page, and choose who to notify. You are able to notify the Customer, the assignee of the Ticket, and other CRM users. Responses are permanent and cannot be modified.

You can make any Ticket response private, which means it will only show up for users of the CRM system, and the Customer will not be able to see or receive the response.

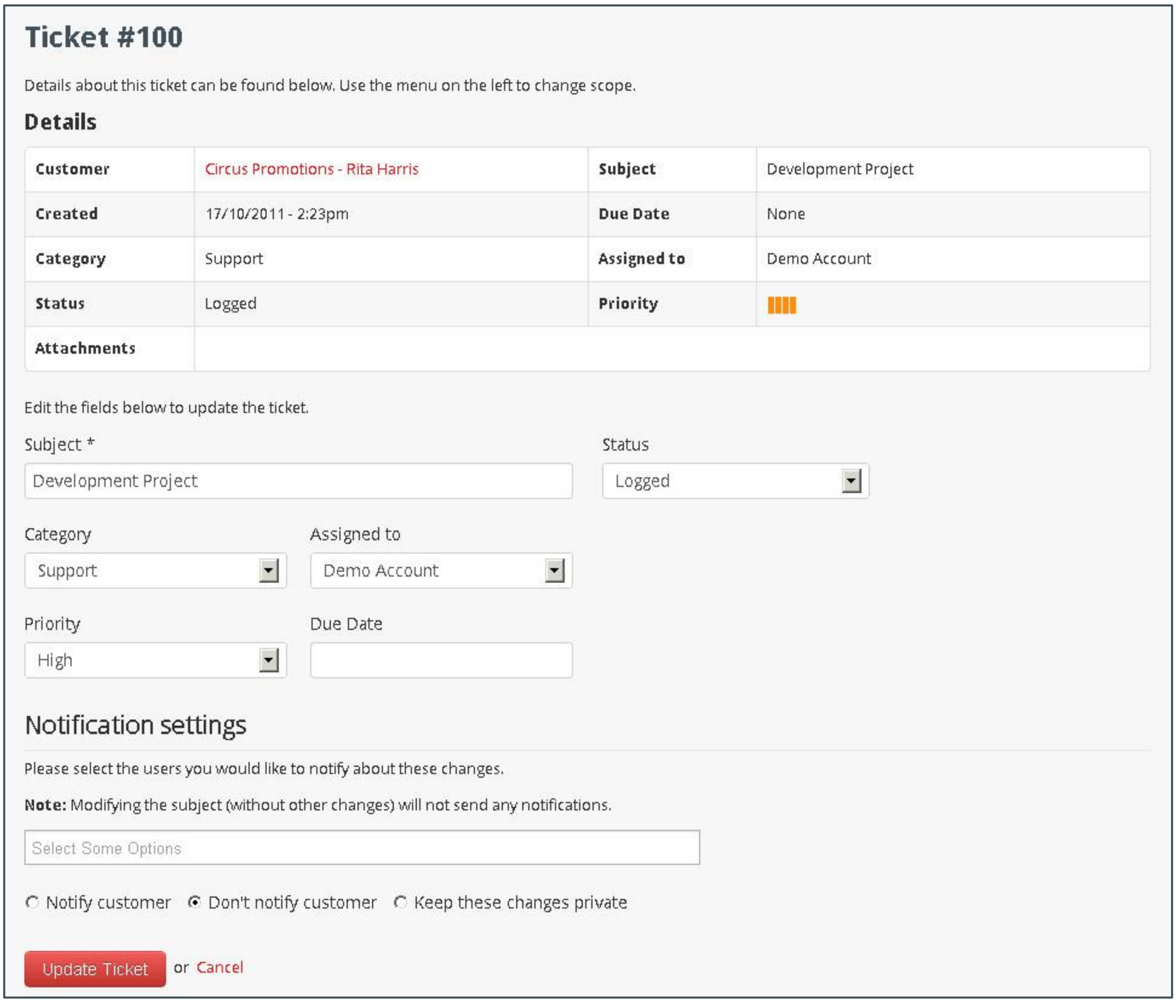
A new status can also be selected at the time of writing a new response and the details of this change will be included in any emails sent out.

Attachments can also be added when creating a new response, and these are also sent out in any email notifications as email attachments.

You and your Customers can directly respond to any notifications they receive simply by replying to the email. Attachments can be included as well and these will be entered as new responses in the Ticket.

Editing a Ticket

At any time you can edit the details of a Ticket by selecting 'Editing' in the left menu of the Ticket page.



The fields that can be edited are:

Subject	What the Ticket is primarily about.
Status	What stage the Ticket is in, e.g. Logged, Assigned, In Progress, Customer, On Hold, Closed.
Priority	How urgent the Ticket is (Critical, High, Medium, Low, Lowest).
Due Date	When this Ticket is due to be completed/closed. This field is optional.
Notification Settings	You can choose who to notify about these changes.

Child Tickets

Tickets can have Child Tickets.

Child tickets are useful if there is part of a job or task that needs to be done by another user.

To view Child Tickets assigned to a Parent Ticket, or create a new Child Ticket, click the ‘Child Tickets’ button in the left menu when viewing an existing Ticket.

This will direct you to a new page, which will show you any existing Child Tickets. Click the ‘Add a New Child Ticket’ link to create your Child Ticket. Fill in the details and save.

Child Tickets

Child tickets are listed below. Add a New Child Ticket

#	Subject	Category	Status	Assignee	Created	Due	Priority
129	Child Ticket Test	Sales	Logged		08/10/13		

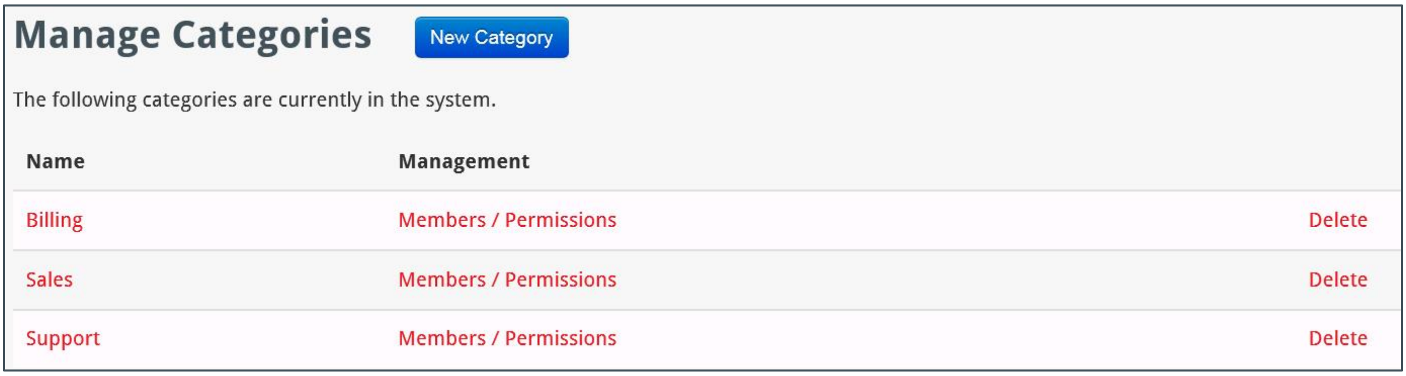
Only a normal Ticket can have a Child Ticket. A Child Ticket cannot have Child Tickets.

Categories

Tickets require Categories of users in order to be able to assign the Ticket to a user.

For example, if you had a ‘Support’ Category for Tickets, only the users that could provide support would be assigned to this Category.

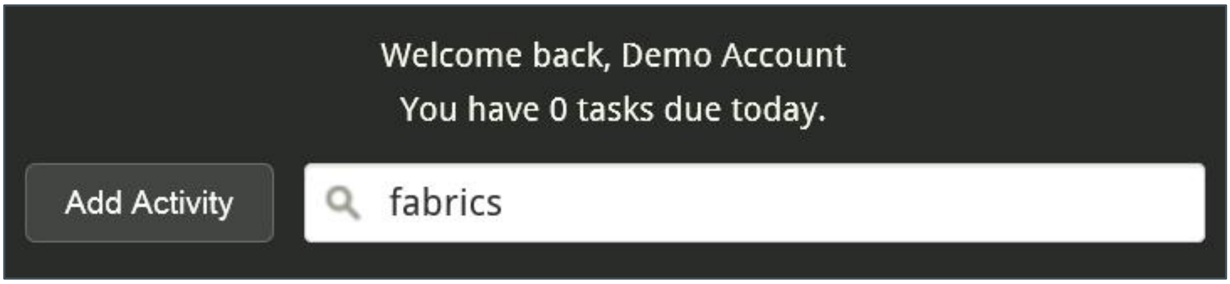
If you are an administrator of the system, you can create a new Category by selecting 'Administration' and then 'Ticket Categories' in the top menu.



Click the 'Members / Permissions' link to edit members assigned to each category. You can add members and select what permissions for Tickets they have in this category – View, Edit and Receive Alerts.

Quick Search

The Quick Search functionality is the fastest way to find a Customer, Contact, or Lead that you want. To use the Quick Search you simply enter your search string in the text box at the top of the page.



After pressing enter, you will be directed to a page with the results of your search.

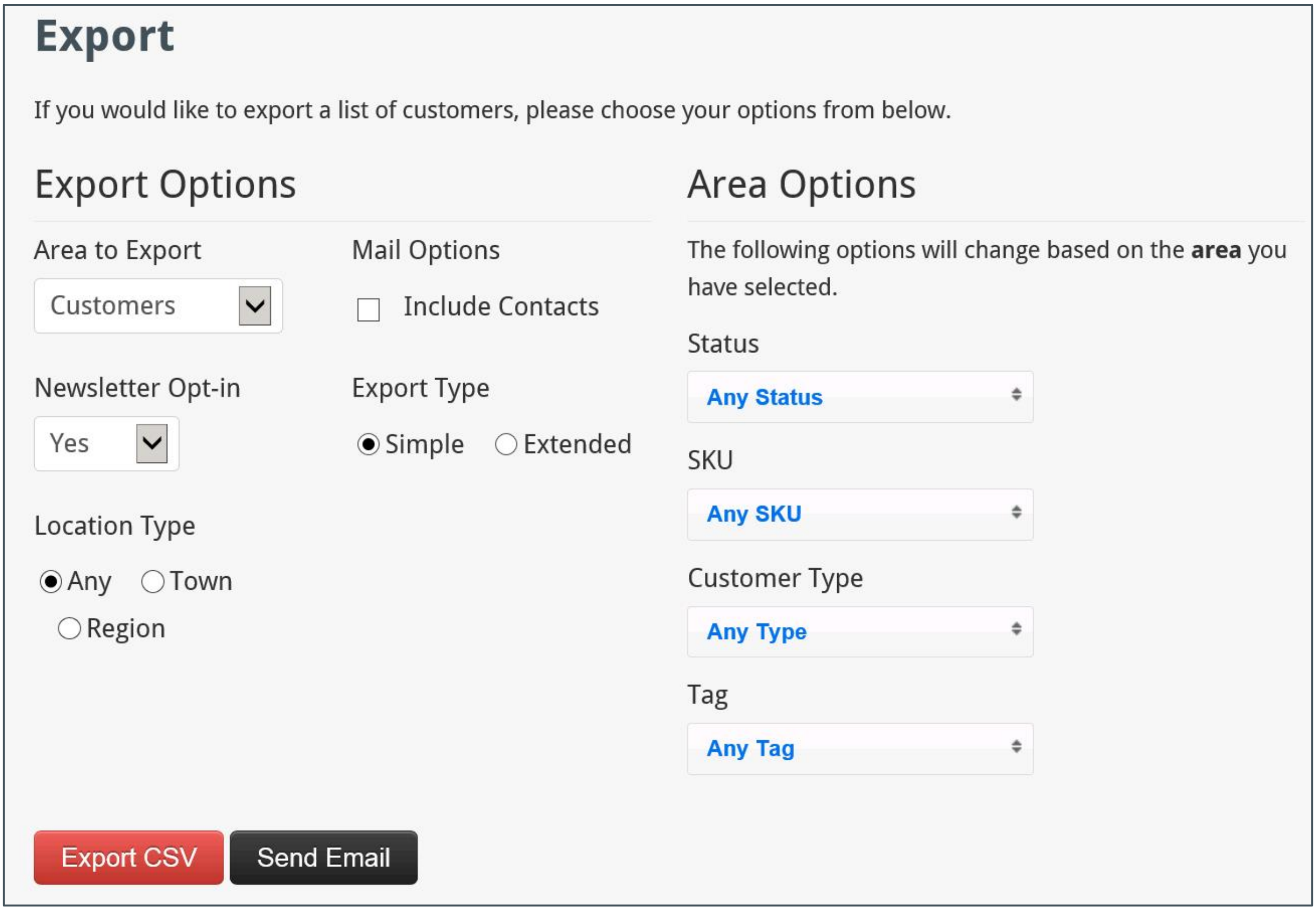
A quick way to do a search is hit the 'Q' button on your keyboard and the cursor will automatically appear in the search box, from wherever you are in the system.

Note that as with all searches, you can click on an email address to automatically open your default email client with the Customer's email address, and a bcc address that once sent, will automatically add the email into CRM as an Activity.

This email link is also available via the View Customer, Contact, and Opportunity pages.

CSV Export and Mass Mail

QikBiz CRM allows you to perform an advanced CSV export of Customers, Contacts, and Leads. Using the same filtering, you can also send a mass mail out to selected Customers, Contacts, and Leads.



You can easily select the exact type of Customer, Contact or Lead you want to export/mail by using our advanced criteria. Using the selections provided you can select one, or multiple criteria (eg. select multiple Tags).

The selection options will change based on whether you are exporting Customers, Contacts, or Leads.

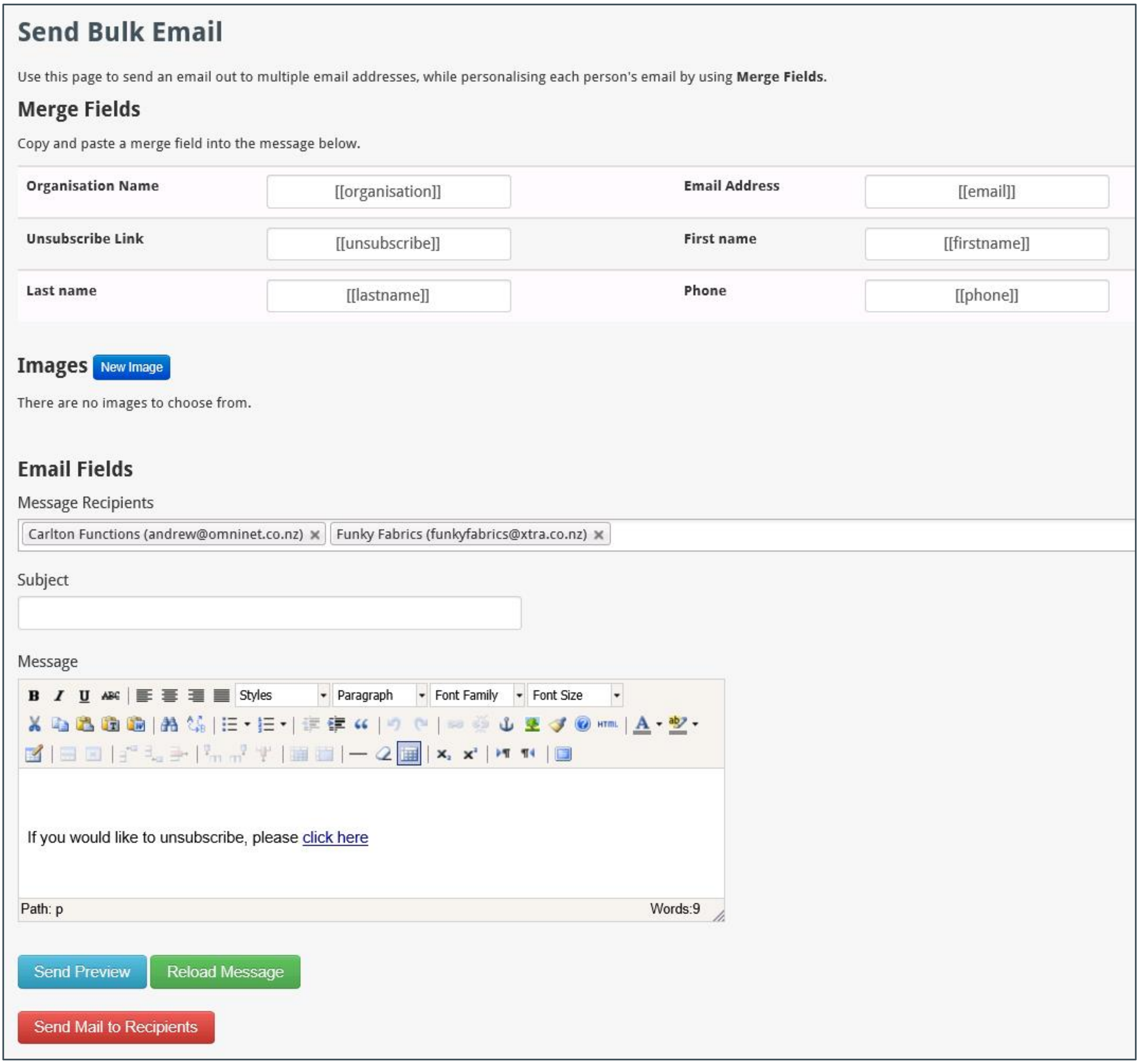
- Include Contacts (Mail Only) is a mass mail only option which allows you to also email the Contacts under a Customer.
- Newsletter Opt-in Status is especially important when emailing, because if they are not opted in you will generally not email them at all. Therefore the default option is set to “Yes” which will only return people that have opted-in.

If you select Download CSV, a prompt will appear allowing you to save the file to your desktop and it can be opened from there.

If you select ‘Send Email’, you will be redirected to the Send Bulk Email page.

Mass Mail

From here you will be able to draft an email to the Customers you have selected (based on the filtering on the previous page).



Merge Fields

Several 'merge' fields are available to insert into your email, and are indicated under the Merge Fields heading.

For example, 'Hello [[firstname]]' would insert the Contacts name when sending the email.

There is a "If you would like to unsubscribe, please click here" message at the bottom of the message area by default. It is important to leave this there so your Customers can choose to change their newsletter opt-in status to No.

Image Fields

Image fields are similar to merge fields, you put them into the message area, and upon sending they are converted into the recognized image in the system (they can also be previewed by clicking the reload button).

You can upload a new image to the system by clicking the New Image button.

Modifying Message Recipients

If you happen to see an email address that you think shouldn't be in the recipients, you can easily remove it by clicking the X next to their email address.

Subject

Here you enter the subject of the email, as you normally would when sending an email.

Message

You can enter the body of your message and format it here.

Reload Message

If you have any images from the system in the message, you will be able to click this button and the message area will refresh and actually display the image. This is useful for formatting your message to exactly how you want it.

Send Preview

Clicking Send Preview will perform a reload (above), and send a preview email to your email address only. This is useful to make sure the formatting is exactly how you want it, and it is recommended that this is done before any bulk sending occurs.

Send Mail

By clicking send mail, you will send the email you have drafted to all email addresses in the recipients box. Once you click this you will see a screen that indicates who the message was sent to, and whether it was successful or not.

Users and Groups

If you are an admin in CRM you can manage the people that can log in to the system, what permissions they will have, which groups they will belong to, and the permissions they will have in those groups.

To edit your Users, go to 'Administration' then 'Users' in the top menu.

Manage Users

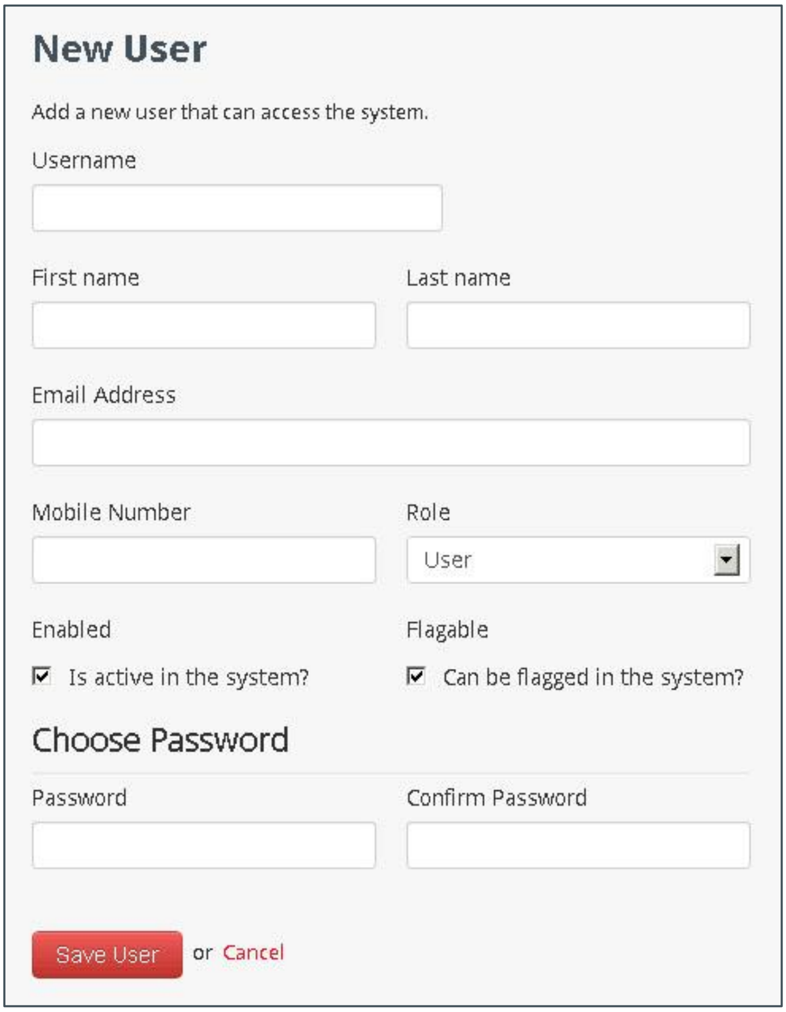
The Users page will display all Users and their information.


Manage Users New User

The following users are currently in the system. Click on a user's full name to manage them.

Name	Username	Email	Access Level	Last Login	Enabled
Demo Account	demo	support@qikbiz.co.nz	Admin	16/10/2013 - 11:59am	Active
Demo Account 2	demo2	demo2@qikbizcrm.com	User	09/11/2011 - 4:12pm	Active

Use the 'New User' button to add a new User.



To create a new user, simply fill out the fields and click ‘Save User’.

The ‘Role’ field has several options – Administrator, Power User, User or Restricted User. These are the base permissions a user has for the system.

Restricted User	The user can only view / edit Organisations / Contacts / Leads that are directly assigned to them, or the groups they belong to.
User	A standard user, can view / edit anything that is public (doesn’t have an owner), or anything assigned to them, or the groups they belong to
Power User	A power user, can view / add / edit / delete anything, and can perform an export / mass mail.
Administrator	A power user but can also perform all admin functions (Managing tags, users, etc).

The ‘Flagable’ option is to choose whether or not the user can be assigned Activities.

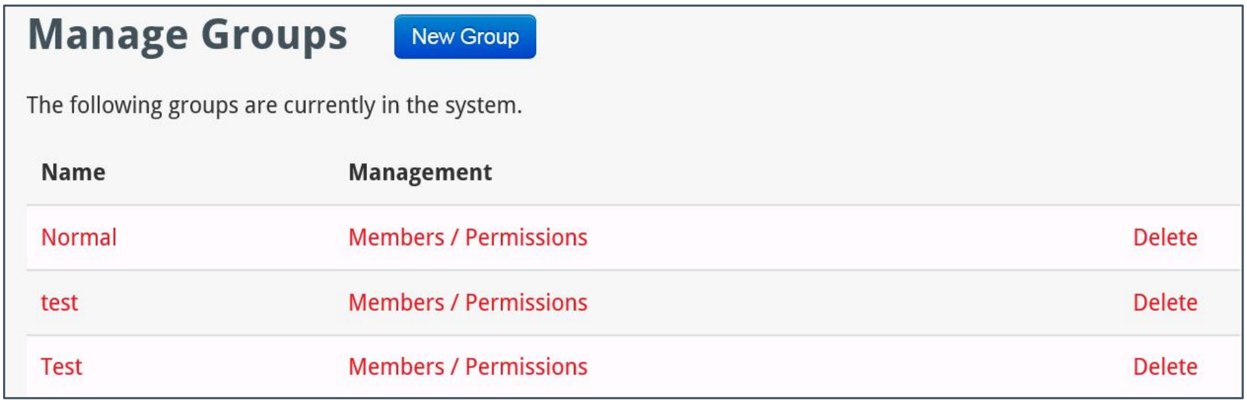
Editing an existing user

To edit an existing user, click on their username in the Manage User screen.

Groups

Usergroups are used as ‘owners’ of Customers, Contacts, or Leads.

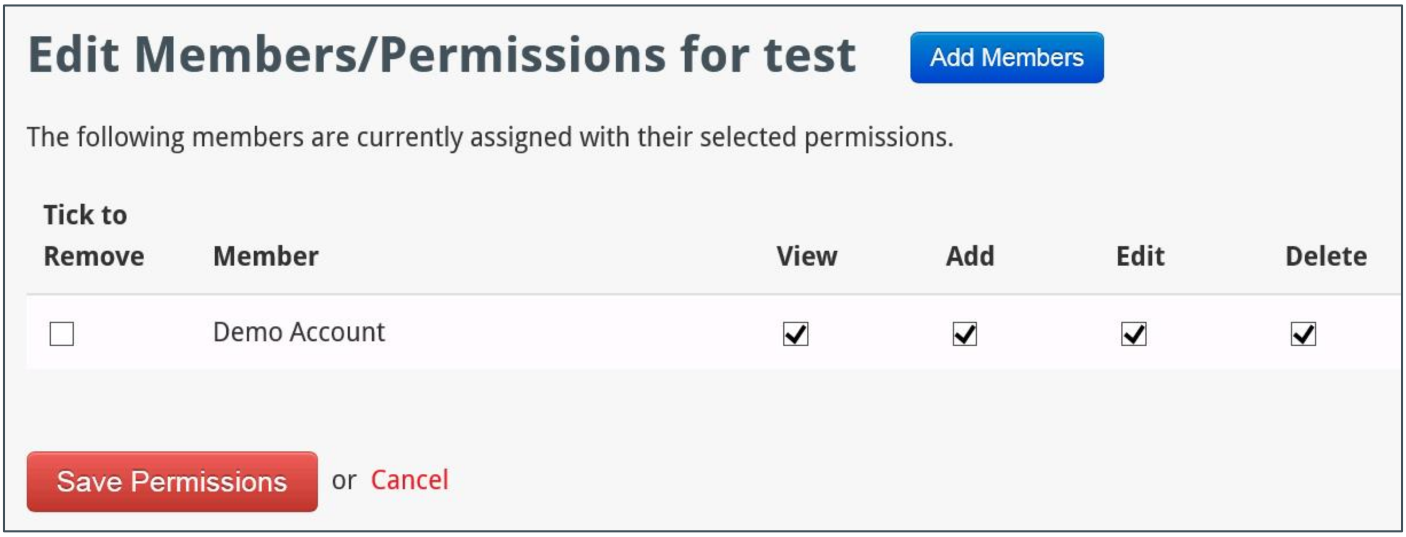
Each group member can have their own permissions set (View, Add, Edit, Delete). To access Groups, go to ‘Administration’ then ‘Groups’ in the top menu.



You can create a new group by clicking on the ‘New Group’ button.

To edit members and permissions for each group, click the Members/Permissions link beside the group name.

View	User can view anything this group is the owner of.
Add	User can add a new Customer, Contact, or Opportunity, and assign this group as the owner.
Edit	User can update anything this group is the owner of (includes adding Activities, attachments, etc).
Delete	User can delete anything this group is the owner of.



New group members can be added at any time on the 'Add new members' page, by selecting the members to be added from the list, and assigning their permissions.

Invoices and Recurring Charges

CRM has the ability to plug into some existing systems and retrieve / update data without ever leaving the CRM. One of the most useful parts of this means we can integrate an external invoicing system so that the two systems can work together and make CRM even more useful.

Invoices

CRM can show invoices from an external system where the Customer also exists.

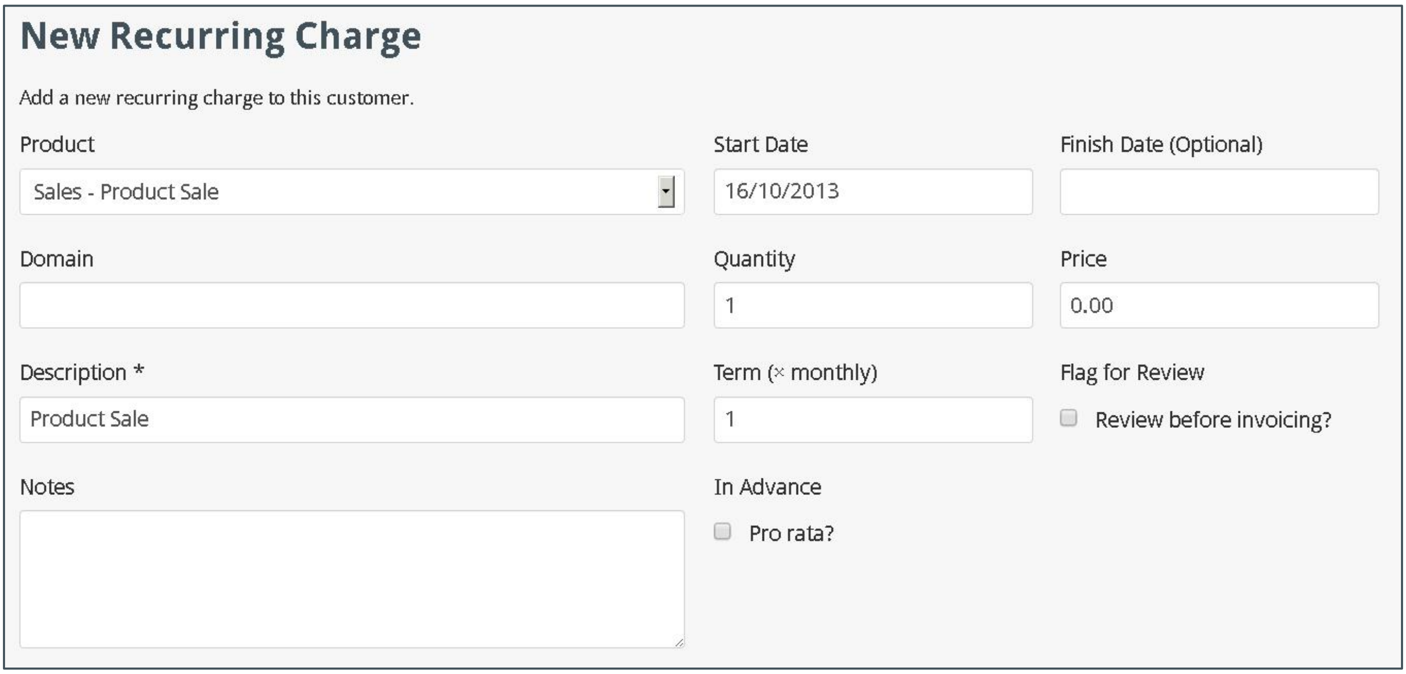
When viewing a Customers page there is an 'Invoices' link in the left menu. This will display invoices for this Customer.

Recurring Charges

Recurring / repeating charges can also be created for a Customer, linking to an external system or keeping track of them in CRM.

The 'Recurring Charges' link is in the left menu when viewing a Customer.

A new recurring charge can be created by clicking the 'Add a New Recurring Charge' link which will bring up a new page.



Product	Selected from a predetermined set of products.
Domain	The section between the brackets (%D) of the product info.
Description	This auto populates from the information you have selected for the Product and Domain.
Start/Finish Date	The dates for this charge to recur.
Quantity	The number of products/services to be charged.

Price	Price for the charge.
Term (x monthly)	How often this charge recurs.
In Advance	Select if this charge gets charged in advance.

Edit a Recurring Charge

You can edit recurring charges. Simply view a Customers recurring charges, and click on the red links under the SKU heading. You will then be directed to a page where you can make your changes.

Shortcuts

When on the Dashboard there are several shortcuts you can take. Hit the numbers listed below to go to the corresponding screen:

1 Summary

2 Tasks

3 To Do List

4 Tickets

5 Opportunities

6 Recent Activity

7 Statistics

Thank you for using QikBiz CRM.

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Email	info@qikbiz.co.nz
Website	www.qikbiz.co.nz