crmSeries

Web

- **Login**
  - Next.crmSeries.com
- **My Profile**
  - User Settings
  - Email Setup
    - Select Calendar to Merge with Office365
    - Task, Calls, and Events to Send to Office365
- **Add**
  - Prospect – Add a new Prospect
  - Contact – Add a Contact and Associate with a Company
  - Equipment – Add a Machine and Associate with a Company
  - Note – Add a New Note
  - Call – Add a New Call
  - Task – Add a New Task
  - Email – Send an Email
  - Lead – Create a New Lead
  - Sales Quote – Create a New Equipment Sales Quote
  - Lost Opportunity
    - Lost Sale – Create a New Lost Sale
    - Lost Rental – Create a New Lost Rental
- **Menus**
  - Dashboards – Defined Dashboard Widgets to show.
  - Search – Select the type of data to search (Company, Contact, Equipment)
    - Enter the values to search and select the Search button.
    - Select Record link in list to open Record.
  - View – select a view to list available records.
    - Select Left Menu for Quick Actions
      - Add Note – Add Note associated with the Record
      - Add Lead – Add Lead associated with the Record
      - Add Call – Add Call associated with the Record
      - Add Task – Add Task associated with the Record
      - Add Contact – Add Contact associated with the Record
      - Add Sales Quote – Add Quote associated with the Record
      - Select for Merge – Merge Company with one or more Companies
      - Request Account Access – Request access to this Company
    - Records can be filtered by selecting the Magnifying Glass icon or a dropdown option.
    - Lists can able be sorted and filtered by selecting a column header.
    - Select Record link to open Record.
    - Select Action (Top Right of List) for Actions to perform on the list
      - Export – Export Data List
      - Grid Setup – Modify Grid Columns and Order.
      - Defaults – Save Modified Grid Setup as Default

Vision Corporation
PO BOX 86860
Baton Rouge LA 70879
support@crmseries.com

            - Reset Default – Reset Grid Setup.
    - My Business
        - Account Access – View Account Access Dashboard.
        - Mapping – Map Activities and Create Routing.
        - Sales – Options for Viewing Sales Type Data.
            - Inventory List – Search Inventory
            - Sales Quotes – Search and List Quotes
            - Quote Dashboard – Quotes in Graph Format
        - Product Support – Product Support Dashboards
            - Undercarriage Wear – List of UC Wear Measurements
            - Component Tracking – List of Major Components being Tracked
            - Alerts – Machine Alerts that have been set
            - Resource Center – Document Resources
            - Export Lists – Saved Data Exports
                - Add – Add New List
                - Edit – Modify Existing List
                - Delete – Delete an Existing List
                - Contact – List and Export List Contacts
        - Lead – List of Leads
        - Active Campaign – Campaigns and Actions
    - Reports
        - Report List – Create and List Save Reports
        - Schedule – Reports scheduled for Automated Delivery
- **Company**
    - Star - Highlighted Star indicates Company is Set as Favorite
    - Tabs
        - Overview – Company Widgets
        - Details – Company Information Breakdown
        - Name, Account #, Phone, Category, National Account, Ranking, etc.
        - Reps – Reps by Role that are assigned to the Account
        - Contacts – Contacts Assigned to the Account
        - Equipment – Equipment Population for the Account
        - Notes – Notes assigned to the Account
        - Sales Quotes – Equipment Quotes Assigned to the Account
        - Inspections – A Rollup of Equipment Inspections for the Account
        - Address – Additional Addresses for the Account
        - Leads – Leads assigned to the Account
        - Email – Emails between the Logged in User and Contacts for the Account
        - Rental History – History of Rental Equipment for the Account
        - Open Activities – Activities Open for this Account
        - Opportunities – Opportunities associated with the Account
        - Custom Tabs can be created by an administrator

    - Actions
        - Note – Add new Note for the Company

        - Task – Add new Task for the Company
        - Lead – Add new Lead for the Company
        - Call – Add new Call for the Company
        - Change Request – Send Notification to Change the Company Information
        - Contact – Add new Contact Associated with the Company
        - Equipment – Add new Equipment Associated with the Company
        - Rep – Assign Rep to the Company
        - Opportunity – Add new Opportunity Associated with the Company
        - Lost Sale – Add Lost Sale Associated with the Company
        - Lost Rental – Add Lost Rental with the Company
        - Inspection – Add new Inspection for the Company
        - Sales Quote – Add new Equipment Sales Quote for the Company
        - Recurring Touch – Create an Automated Recurring Touch for the Company
        - Address – Add an Address Associated with the Company
        - File – Upload a File Associated with the Company
        - Insurance Policy – Assign an Insurance Certificate for the Company
    - Edit – Edit the Company Record
        - Save – Save Changes
        - Cancel – Cancel Changes
    - Merge Account – Merge the Company Record with one or More Company Records
- **Contact**
    - Star – Highlighted Star indicated the Contact is marked as a Favorite
    - Tabs
        - Details – Contact Name, Phone, Email, Position, etc.
        - Notes – Notes Associated with the Contact
        - Email – Emails between the Logged in User and the Contact
        - Open Activities – Open Activities for the Contact
        - Leads – Leads for Contact
        - Active Campaign – Active Campaign Records for Contact
        - Files – Uploaded files for the Contact
        - Closed Activities – Closed Activities for the Contact
        - History – History of Changes for the Contact Record
        - Custom Tabs can be created by the system Administrator
    - Add New
        - Note – Add new Note for the Contact
        - Task – Add new Task for the Contact
        - Call – Add new Call for the Contact
        - Sales Quote – Add Sales Quote for the Contact
        - Lead – Add new Lead for the Contact
        - File – Add new File for the Contact
    - Edit
        - Save – Save Changes
        - Cancel – Cancel Changes

  - Delete
    - May or May not have this option based on your User Rights
- **Equipment**
  - Panels
    - Unit Summary – Machine specific information such as Make and Model
      - Edit – Ability to Edit the Unit Summary Information
    - Hours Summary – Last SMR, Last SMR Date, Hours Per Day, etc.
      - Edit – Ability to Edit Hour Summary Information
    - Machine Location – Telematics Generated location for the machine
    - Alerts – History of Alerts set for the Machine
    - Working Hours – History of Hours for the Machine
  - Tabs
    - Overview
      - Unit Summary - Make, Model, Serial, Year, etc.
      - Hour Summary – Last SMR, Est Hours Per Day, etc.
      - Pricing Summary – For Inventory Only
    - Attachments – Associated Attachments for the Base Machine
    - Inventory - Appears only if an inventory machine and list options
    - Sales Quotes – Appears only if an inventory machine and list sales quotes
    - Service Quotes – Parts quotes for the machine
    - Inspections – History of machine inspections
    - Components – Components tracked for the machine
    - Warranties – Machine assigned warranties
    - Invoices – Invoice history for the machine
    - Work Orders – Work order history for the machine
    - Alerts – Machine alerts set for the machine
    - Notes – Hote history for the machine
    - Open Activities – Open activities for the machine
    - GET – Ground Engaging Tool Profile for the machine
    - Images – Images associated with the machine
    - Files – Uploaded files associated with the machine
    - Closed Activities – Closed Activities for the machine
    - History – Record change history for the machine
  - Actions
    - Add Note – Add new note for the Machine
    - Task – Add New Task for the Machine
    - Alert – Add an Alert for the Machine
    - Component – Track a Component Life for the Machine
    - Inspection – Create a New Inspection for the Machine
    - Attachment – Assign an Attachment for the Machine
    - Add GET – Profile the Ground Engaging Tools associated with the Machine
    - Image – Add an Image to the Machine
    - File – Upload a File for the Machine
    - SMR Update – Change the SMR (Hours) for the Machine

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- **Add Manu Function**
  - Call
    - Subject
    - Select Associated Record
      - Company
      - Contact
      - Equipment
      - Sales Quote
      - Opportunity
    - Enter Associated Record (Type Ahead)
    - Status
    - Start Date / Start Time
    - Reminder (Optional)
    - Duration
    - Type
    - Purpose
    - Result
    - Attach File
    - Comments
      - Save
      - Cancel
  - Call
    - Select Associated Record
      - Company
      - Contact
      - Equipment
      - Sales Quote
      - Opportunity
    - Enter Associated Record (Type Ahead)
    - Note Date
    - Type
    - Purpose
    - Result
    - Attach File
    - Comments
    - Schedule Task
      - Save
      - Cancel
  - Contact
    - Company
    - Title
    - Position
    - First Name
    - Last Name
    - Department
    - Phone

        - Nick Name
        - Mobile
        - Email
        - Fax
            - Save
            - Cancel
    - Equipment
        - Company
        - Make
        - Model
        - Serial #
        - Stock #
        - Equip #
        - Year
        - Description
        - Category
        - Hours Per Day
            - Override
        - Average Use Inspection Max Range
        - Active
            - Save
            - Cancel
    - Email
        - Subject
        - Attach File
        - Body
            - Send
    - Lead
        - Owner
        - Description
        - Source
        - Status
        - Reason
        - Comments
        - Company Name
        - Address
        - Phone
        - Fax
        - Web
        - Contact Title
        - Position
        - First Name
        - Last Name
        - Department
        - Phone
        - Cell

  - Email
  - Make
  - Model
  - Equipment Type
    - Save
- Sales Quote
  - Company
  - Contact
  - Sales Rep
  - Branch
    - Next
- Lost Opportunity
  - Lost Sale
    - Company
    - Rep
    - Branch
    - Lost Sale Date
    - Sale Type
    - Transaction Type
    - End Use
    - Reason
      - Equipment
        - Make
        - Model
        - Year
        - Units (Count)
        - Sale Price
        - Attachments
        - Delivery State
        - Delivery County
      - Competitor
        - Competitor Name
        - Quoted Price
        - Year
        - Make
        - Model
    - Lost Sale Comments
      - Save
      - Close
  - Lost Rental
    - Company
    - Rep
    - Branch
    - Rental Start Date
    - Reason
    - Make

- Model
- Attachments
- Rental Rate
- Rental Interval
    - Competitor
        - Competitor Name
        - Rental Rate
        - Rental Interval
        - Make
        - Model
- Lost Rental Comments
    - Save
    - Cancel