

Sales Rep Portal/CRM Overview

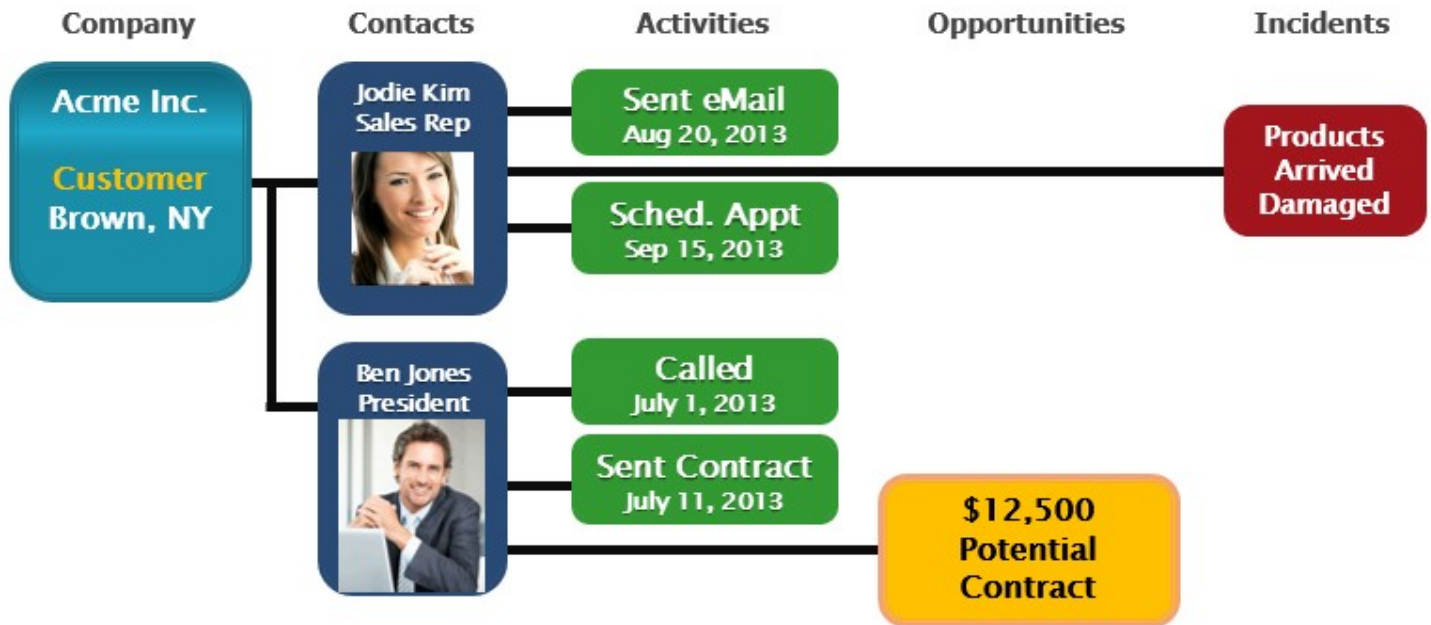
OnContact's Customer Relationship Management (CRM) system is a powerful tool, especially when it's integrated with RB-ERP.



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CRM Key Concepts

Key information is tracked in three primary types of records: Companies, Contacts and Activities.



Company records store the business information such as address, type of business, territory, and more. These are the customers, prospects, partners, competitors or other businesses you want to keep information about.

Companies are linked to your individual Contacts ...the actual people your business interacts with, such as the Purchasing Agent, president or Sales Rep. You can link contacts not only to company records, but also to activities, opportunities and incidents.

Activities are used to record interactions with companies and contacts (for example, telephone calls, meetings), and to record tasks or events associated with opportunities and incidents.

In addition to these three types of records, some people use Opportunities- which can be linked to Company or Contact records. They identify the details for potential sales, and help you plan and manage your sales process and monitor the effectiveness of strategies for closing deals.

And, you may wish to use Incidents for managing customer questions or problems. They allow you to track issues that require customer service or technical support.

Sales Rep Portal

The Sales Rep Portal integrates CRM with your RB-ERP system:

This Record in RB-ERP:	Relates to this CRM Record:
Company	Company

Quotation	Opportunity
RMA	Incident

RB-ERP customer, order and invoice and other information is linked to CRM via the **External ID field**. When this field is populated in RB-ERP on the Customer record, that Company is then added in CRM. From that point on, the Company's orders, invoices, A/R Aging and other information is displayed in CRM on its Company record. Data is updated instantly from RB-ERP in CRM, so your team has up-to-the minute information at their disposal.

The following RB-ERP Read-Only data can be viewed and searched for in CRM:

- Invoice Orders
- Open Accounts Receivable
- Quotations
- RMA
- Warranty
- Open Orders **Data Direction**

It's important to note that most data is exchanged via a one-way path. RB-ERP is generally the 'master' of the data, so changes you make to the company in RB-ERP (such as the company name) will cause that data in CRM to be updated as well.

Note: Some information-such as the Address and Phone Number can optionally be Bi-Directional, although you should choose this option with care. Remember that the RB-ERP financial data uses the address info for billing, etc. If your CRM Users accidentally change this and it is updated in RB-ERP as a result, this could cause problems.

All the order, invoice, A/R data shown in CRM is read-only. **Changes that need to be made to this information must be done in RBERP.**

Notes:

1. RB-ERP will never delete an OnContact company. If you remove the link or delete a company, you will also have to go into OnContact to delete the Company.
2. RB-ERP Ship-To information will only be updated from OnContact if the CRM Configuration is set to have the Ship-To customers linked to OnContact Companies.

Logging In

There is a single unified Login for both systems. RB-ERP stores the CRM user codes to establish a relationship between users of the two systems. Users are only required to log into one application.

Sales Dashboard:

- drill down to order data, etc.
- 360 degree view of Company

CRM Company Page

Several additional tabs have been added to display ERP data related to the selected company:

Quotations Tab

- Lists all Quotes in grid. Double-click any Quote to open the Quote form in the Sales Rep Portal.
- Click the New button to open the RB-ERP Quotation Header in Add mode, defaulting current company information.

RMA

- Lists all RMA's in a grid. Double-click any RMA to open it.

L&W

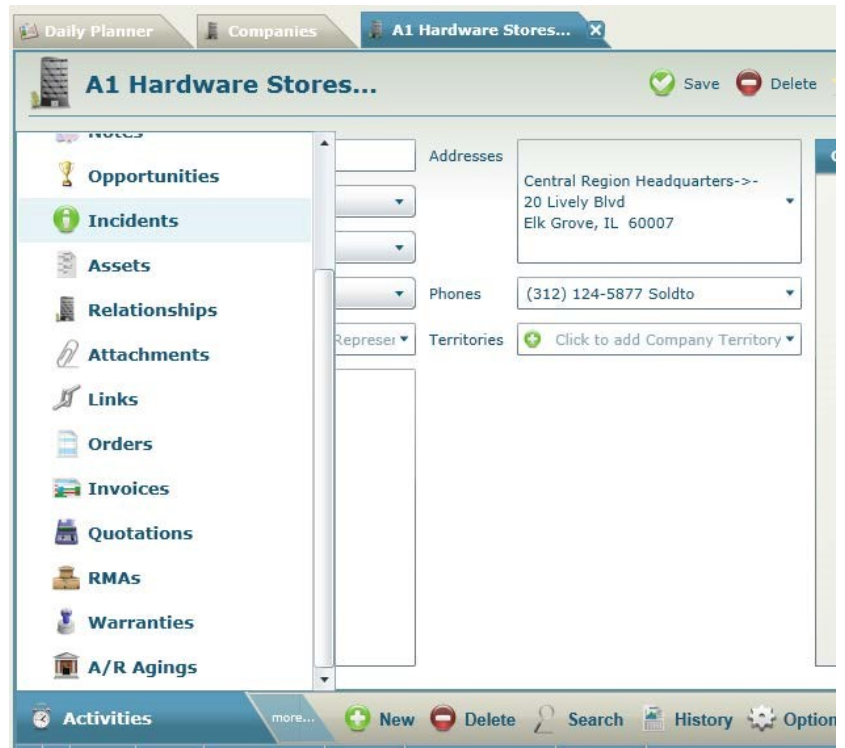
- Serial Number field in result grid is a hyperlink field to open the Warranty page in CRM.

Receivables

- Invoice Number field in result grid is a hyperlink field to open the Invoice page in CRM.

Other

- New Quotation option is present on the CRM Navigation menu. New button may be used to open the RB-ERP Quotation Header in Add mode.



In RB-ERP several fields were added to the following tabs:

Orders

- Order Number field in result grid is a hyperlink field to open the Order page in CRM.

Invoices

- Invoice Number field in result grid is a hyperlink field to open the Invoice page in CRM.
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RMA and Liability/Warranty Integration

If you are using RB-ERP's RMA module, you can take advantage of the CRM integration to better track customer complaints and concerns and be able to process product returns if that is the method for solving the customer's problem.

This is accomplished via a link a link between OnContact Incidents and RB-ERP RMA's. You can create or access an RB-ERP RMA from an OnContact Incident and also to create or access an OnContact Incident from an RB-ERP RMA.

From RB-ERP's RMA screen, you can click the 'Incident' button to open CRM and log an incident.

From the CRM Incident screen, click Tools, and select 'RMA' or 'Serial Nos,' to open the RB-ERP and create the new related record.

From the Customer Service WorkBench, you can click the "Copy Incident S/N" to create RMA Lines for Serial Numbers that are connected to an OnContact Incident.

RB-ERP Liability & Warranty Serial Number Maintenance

From the Customer Service WorkBench Warranty tab, you can click the Incident button to add or open the CRM Incident record. When you do, the following can occur:

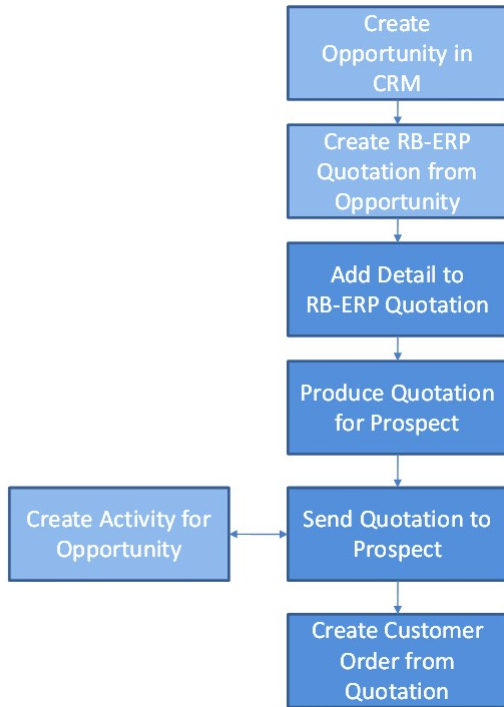
- Access the CRM Incident if the RB-ERP Serial Number is connected to an existing CRM Incident
- Link the RB-ERP Serial Number to an existing CRM Incident (you can also do this from the CRM Incident record)
- Create a new CRM Incident for the Ship-To Customer's CRM Company

Quotes and Opportunities

When RB is linked to CRM, you can:

- access a Quotation that is already tied to an Opportunity
- Link an opportunity to an existing Quotation

- Create a Quotation from an existing Opportunity



Turn CRM Prospect into RB-ERP Sold To Customer

1. From the Fin WorkBench choose the Accounts Receivable tab, and then the Customer Management tab.
2. Click New.
3. Enter the Customer # you want to use -this will become the External ID number in CRM.
4. Click OK
5. Answer Yes to add a Sold To Customer.
6. Under the Options menu, choose CRM Connect to open the CRM Company search screen.
7. Search for and select the CRM Company and click ok.
8. Your new Sold to record is displayed, and populated with the CRM data. You can continue to add additional data or close.