**Ohioedge CRM+BPM Server Users Guide** Tammy Dixit January 5, 2007

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## Introduction

This manual is intended for the users of Ohioedge CRM+BPM Server. It explains tasks performed by a typical user, such as, assigning, performing & signing-off tasks, running reports, creating email and letter templates, running campaigns, etc. Examples used in this manual refer to the sample 'Demonstration Corp.' database included with Ohioedge CRM+BPM Server download (http://www.sourceforge.net/projects/ohioedge).

### Background

### Organizational Roles and Responsibility Management:

In the context of business processes, for example sales, typically an organization's activities are organized under business units, for example regions, divisions, etc. This enables an organization to perform activities at lower (transactional) levels and analyze them at higher (summary) levels for effectiveness. Figure 1 shows the organizational model of Demo. Corp. Demo Corp. operates under three national offices. National sales managers manage national offices. The US Sales national office is further organized into regions – Western Southern, and Midwest. These regions are responsible for the day-to-day sales activity, performed by their sales representatives. The Canadian and Mexican offices don't have further breakdown into regions and directly oversee the activities of sales representatives.





The organizational chart/hierarchy diagram illustrates organizational hierarchy, roles associated with the levels of hierarchy and actual people assigned to these levels. The leaf nodes (lowest level) of hierarchy are transactional nodes. This is where actual work takes place. This is the **vertical model** of an organization. Later in the business cases on running reports, signing-off, etc., we will see how the vertical model enables different people at different levels, view/perform different data/activities.

## Organizational Process(Workflow) Management

Below is a sample organizational process(workflow) diagram:



The organizational process diagram illustrates the **horizontal model** or flow of work (that takes place at the leaf nodes of organizational hierarchy.)

Ohioedge CRM+BPM Server organization administrator is responsible for configuring organization-specific vertical and horizontal models.

#### Custom Fields:

To be completed.

#### Campaign Management

In Ohioedge CRM+BPM Server, every activity a user performs belongs to a campaign. A campaign specifies the purpose of operation. A campaign may be generic or specific; it may be never ending or short-lived. For example, an organization could setup a 'general business' campaign to perform and track its day-to-day activities or setup a 'send seasons greetings' campaign to send seasons greetings to the presidents of existing customers or

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	inputFactory:	Company presidents						
	Scenario (UOB):	DH Central-Cold Call						
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setup a 'promotional offer' campaign to email a new promotion to prospective customers.

A campaign is also how inputs (accounts, contacts, etc.) are assigned to account managers.

The creation of a new activity is validated against the selection criteria of its campaign to ensure that the input (accounts, contacts, etc.) is accessible to the creator -account manager for example. Here is the technical definition of such relationship: creators *have access to* campaigns; and campaigns *specify* input selection criteria. Figure 3 shows how to create a campaign. As seen in the figure, a campaign uses an input factory to select the data (company presidents for example) for which campaign is to run. Campaign is started from Setup->Services Ohioedge CRM+BPMServer organization administrator is responsible for setting up input factories.

#### Assignment Management:

Lost sales due to poor follow up on leads is amajor sales obstacle. The most effective and profitable way to deal with this issue from a sales perspective is to do the following: Route leads to the right sales repautomatically, eliminating delays and Track the progress of leads through the sales pipeIne in real time. In Ohioedge CRM+BPM Server assignment of leads (tasks) to sales reps is done automatically. This, in addition to the campaign management functionality that enables accounts to be owned by account managers, facilitates multiple sales reps working under an account manager to receive specific input (leads, etc.) assignments. Ohioedge CRM+BPM Server comes with an out-of-the-box assignment logic of 'simple random assignment.' Below is how the 'simple random assignment' logic works: Let's say there are two sales reps – A and B, available at the 'Cold Call' activity type. The 'simple random assignment' logic would assign the first unassigned activity at Cold Call to sales rep A, the second to sales repB, the third to sales rep A, so on and so forth. Figure 4 shows how activities are assigned to Sales Rep J. Todak automatically (see Gunton Corp customer record in the figure.)

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	DH Central-Order Complete	
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Figure 4.

# Creating an Activity:

Activity created by a campaign:

Say you have a campaign setup to call all the Presidents of theterritory with area code

'216' with a new promotional offer. Figure 5 shows a campaign NewPromo defined.

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Figure 5.

When you run this campaign, the robot will automatically assign activities to the Sales Rep responsible for the Canada Cold Calls. Figure 6 shows a report of the activities assigned to the Canada Sales Rep.

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Figure 6.

If you drill down on any activity, as shown in Figure 7, you will see all the details of the

activity that needs to be performed.

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Figure 7.

Note the Campaign name is the New Promo campaign, which indcates that New Promo campaign created this activity.

## Activity created manually:

An activity can be created manually by a mechanism that has the privilege to create an

activity. An activity can be created for a

- 1. Customer
- 2. Customer Person
- 3. Buyer
- 4. Customer Requirement
- 5. Other input you configure to flow through Ohioedge CRM+BPM Server.

Say you want to create an activity for a customer West End Construction. You will first have to select the customer. As shown in Figure 8.



Figure 8.

Click on the Activity link in the Quick Links portlet. Click on the Maintain link in the

upper left corner portlet. Figure 9 shows the Activity Maintain page.

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Figure 9.

Select the Territory or ActivityTypeHierarchy that this activity will be a part of. Let us select Canada Cold Call. Select a campaign and click on Create button. Click on the List All link in the upper left corner portlet. Figure 10 shows the activity that was manually created.

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Figure 10.

Similarly, if an activity for a Customer Person/Contact needs to be created you will have to select the appropriate Contact before creating an activity. It is the same for creating an activity for a Buyer or a Customer Requirement by selecting the appropriate Buyer or Customer Requirement.

## **Business Cases:**

Business case I: Activities review by Sales Director

Consider that the Sales Dir. of ABC Corp. wants to review all the activities happening under all the regions. Here is what the Sales Dir. will do:

Login. The Ohioedge CRM+BPMServer administrator will provide the username/password.

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Figure 11. Login

Ohioedge CRM+BPM Server offers two types of reports: PDF reports and HTML reports. The PDF reports are for general purpose reporting. Existing PDF reports could be customized or new PDF reports could be added using third-party report writing tools. Here are some examples of PDF reports:

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	Customer By Line of Business		
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Figure 12.

Here are some results:

Activity Audit Report

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Figure 13.

Number of open activities by Assignee Report



Figure 14.

The HTML reports are driven by input factories and are primarily used for reporting activities by activity types by certain criteria. Some of the typical reports would be 'Activities Due Today,' 'All Open Activities,' 'Activities Past Due Date,' etc. As shown in Figure 15, the HTML reports are accessible from - @QuickLinks->Home-><report record>->Report. It is Ohioedge CRM+BPMServer administrator's job to create HTML reports.

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Figure 15.

The user can further drill-down to view lower level activities as shown in Figure 16.

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Figure 16.

Or if the user selects the report option, a list of all the activities under all regions will be

listed as shown in Figure 17.



Figure 17.

## Business Case II: Activities review by Regional Manager

Consider that the Regional Mgr. of DH Central region of ABC Corp. wants to review all

the activities happening under his/her region. Here is what the Regional Mgr. will do:

Login. The Ohioedge CRM+BPMServer administrator will provide the

username/password.

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Figure 18.

Home page displays only those scenarios of a region that the Regional Mgr. has access to. Say Mr. David Burns is the Regional Mgr. of the regions DH Central and GP Western of ABC Corp. Then when he logs in he sees only the options of Drill-down or Report for the DH Central and GP Western scenarios.

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Figure 19.

If the DH Central Report is run the results displayed are as follows:

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	DH -Central			
	DH Central-Cold Call			
	08/20/02 ColdCall, Gunton Corp, 330-831-1206, 26150 Richmond Rd,			
	Cleveland :: Comments: Created by automatic feeder program. Notes:null			
	DH Central-Order Complete			
	DH Central-Print Literature			
	DH Central-Not Interested			
	DH Central-Shipping			
	DH Central-Follow Call			
	08/20/02 <b>FollowCall</b> , Guild International Inc, 440-232-5887, 7273 Division St, Cleveland :: Comments: Created by automatic feeder program. Notes:null			
	DH Central-Sales Call			
	DH Central-Production			
	DH Central-Receive Order			
	DH Central-Engineering Review			
	DH Central-Email Literature			
	DH Central-Accounting			
	DH Central-Literature Requested			-
🕘 Done		📑 📴 Local i	intranet	

Figure 20.

# Business Case III: To-do review by Sales Rep

Consider that the Sales Rep of DH Central region of ABC Corp. wants to review all the

activities he or she needs to perform for the day. Here is what the Sales Rep will do:

Login. The Ohioedge CRM+BPMServer administrator will provide the username/password.

🕗 Home <- Ohioedge CRM - Mi	icrosoft Internet Explorer provided by America Online	_ 8	×
<u>F</u> ile <u>E</u> dit <u>V</u> iew F <u>a</u> vorites	<u>I</u> ools <u>H</u> elp	<u> </u>	
Gereicher Back Forward Back Forward	Address 🛃 http://s1:8080/SalesContextRoot/Home.ctrl	💌 🤗 Go 🛛 Links	»
Ohioedge®		<u>  Logoff</u>	•
Home	Quick Links		
<u>Search</u> <u>Home   Maintain   List All</u>   <u>Reset</u>	Home   Customer   Requirement   Contact   Buyer   Email   Letter   Campaign   Report   Setup   ?	<u>Scenario</u>   <u>Activity</u>	
	Active Session Information	News	
Bookmarks	Content Management Maximize		
	Please Login:		
	Username: guest7		
	Password:		
	Login Logoff		
	Convright @ 2001 Objective All Rights Reserved		
	Copyright @ 2001 Onlocage. Air Nights Reserved		
			•
<b>e</b> ]		遺 Local intranet	

Figure 21.

Home page displays only those scenarios of a region that the Sales Rep has access to. Say Mr. J Todak is the Sales Rep of the region DH Central of ABC Corp. then when he logs in he sees only the options of Drill-down or Report for the DH Central scenario.

🗉 Home <- Ohioedge CRM - M	licrosoft Internet Explorer provided by America Online	_ 8 ×
<u>F</u> ile <u>E</u> dit <u>V</u> iew F <u>a</u> vorites	Iools Help	Á
← , ⇒ , " Back Forward	Address 🛃 http://s1:8080/SalesContextRoot/Home.ctrl?submit=Home	≎Go ∐Links <sup>≫</sup>
Ohioedge®	jtodak J Todak/Horn & Todak	<u>⊾ogoff</u>
Home	Quick Links	
Home   <u>Maintain</u>   <u>List All</u>   <u>Reset</u>	Home   Customer   Requirement   Contact   Buyer   Email   Letter   Campaign   Scenario   A Report   Setup   ?	.ctivity
	Active Session Information News	
Bookmarks	Content Management Maximize	
	DH:DH -Central   Drill-down   Report	
	Copyright © 2001 Ohioedge. All Rights Reserved	
e)	📃 📃 💭 🖓 🖓	tranet

Figure 22.

If the DH Central Report is run the results displayed are as follows:

🖉 ScenarioInputFactory <- Oh	ioedge CRM - Microsoft Internet Explorer provided by America Online			- 8 ×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites	Iools Help			Â
Back Forward	Address 😰 bject&urlAction=Report&listName=ScenarioInputFactory&inputFactoryID=1&scenario	rioID=2 💌	∂Go	Links
	Scenario: DH -Central reset			
Bookmarks	Content Management Maximize			
	DH -Central			
	DH Central-Literature Requested			
	DH Central-Order Complete			
	DH Central-Accounting			
	DH Central-Print Literature			
	DH Central-Receive Order			
	DH Central-Email Literature			
	DH Central-Follow Call			
	08/20/02 <b>FollowCall</b> , Guild International Inc, 440-232-5887, 7273 Division St, Cleveland :: Comments: Created by automatic feeder program. Notes:null			
	DH Central-Engineering Review			
	DH Central-Shipping			
	DH Central-Production			
	DH Central-Cold Call			
	08/20/02 <b>ColdCall</b> , Gunton Corp, 330-831-1206, 26150 Richmond Rd, Cleveland :: Comments: Created by automatic feeder program. Notes:null			
	DH Central-Sales Call			
	DH Central-Not Interested			
🖉 Done		💂 Local	intranet	

Figure 23.

# Business Case IV: Performing an activity

After running a daily report, say a Sales Rep finds all the activities that, he/she needs to perform for the day, are automatically assigned to him/her. The Sales Rep then drills down on the activity link. Suppose the activity is about making a cold call to a customer in the DH Central region.

🖉 Activity <- Ohioedge CRM -	Microsoft Internet Explorer provided by America Online	_ 8 ×
∫ <u>F</u> ile <u>E</u> dit <u>V</u> iew F <u>a</u> vorites	<u>I</u> ools <u>H</u> elp	Â
← → ⇒ → » Back Forward	Address 🛃 t=Set&listName=Activity&objectToSet=ValueObject&urlAction=Edit&activityID=-938690403 💌 🤅	≻Go ∐Links <sup>≫</sup>
Ohioedge®	jtodak J Todak/Horn & T	odak <u>  Logo</u>
Activity	Quick Links	
Search <u>Home   Maintain   List All</u>	Home   Customer   Requirement   Contact   Buyer   Email   Letter   Campaign   Scenario   Av Setup   ?	<u>ctivity</u>   <u>Rep</u>
<u>Reset</u>	Active Session Information Net	ws
	Customer: Gunton Corp 26150 Richmond Rd, Cleveland, OH, 44146-1438, (Tel):330-831-1206 reset   Scenario: DH Central-Cold Call reset	
Bookmarks	Content Management <u>Maximize</u>	
List all requirements.	activityDate 2002-08-20 10:49:25.03	
List all buyers.	scenario: Make a cold phone call.	
List all contacts.	campaign: DH-Central Standard Campaign	
	Created by automatic feeder program.	
	notes	
	SchDate 2002-08-28 11:53:45 781	
¢]	📃 🔡 Local int	ranet

Figure 24.

Note that in the "ActiveSession Information" portlet, the name of the company, address and telephone number appears. This information is helpful for the Sales Rep to make that cold call. Also note that in the top-left portlet appears the menu "Activity" which indicates that the user is at (working on) the Activity business component. Let's say the Sales Rep needs to know the history on that customer, he/she would need to click on the "ListAll" link in the top-left portlet. By doing so the entire history on that customer will be published as a list of active records where the user can drill down to find out more about the actual activity transaction, such as comments, date of contact, contact person, etc.

🛃 Activity <- Ohioedge CRM -	Microsoft Internet Explorer provided by America Online	_ <b>-</b>
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites	<u>I</u> ools <u>H</u> elp	<u> </u>
← , ⇔ , <sup>™</sup> Back Forward	Address 🛃 null&customerRequirementID=null&activityTypeID=1&activityID=-938690403&crite	eria=%25 🔽 🧬 Go 🛛 Links 🎽
Ohioedge®	jtodak J Todak/H	orn & Todak <u>  Logoff</u>
Activity	Quick Links	
Search <u>Home   Maintain   List All</u>	Home   Customer   Requirement   Contact   Buyer   Email   Letter   Campaign Report   Setup   ?	<u>Scenario</u>   <u>Activity</u>
<u>Reset</u>	Active Session Information	News
	Customer: Gunton Corp 26150 Richmond Rd, Cleveland, OH, 44146-1438, (Tel):330-831-1206 reset   Scenario: DH Central-Cold Call reset	
Bookmarks	Content Management <u>Maximize</u>	
List all requirements.	ColdCall:Gunton Corp, 330-831-1206, 26150 Richmond Rd, Cleveland	
List all buyers.		
List all contacts.		
	Copyright © 2001 Ohioedge. All Rights Reserved	
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<b>@</b> ]		💼 Local intranet

Figure 25.

Say if the Sales Rep wants to know the contacts in the company,the user selects the

"Contact" menu from the "QuickLinks" on the screen. Note that when the user does that the top-left portlet now displays "CustomerPerson" menu indicating that the user is now at

(working on) the Customer Person business object.

Listed, as a link is the contact within the company. Also published are the title, telephone number and address.

🛎 CustomerPerson <- Ohioedg	e CRM - Microsoft Internet Explorer provided by America Online
<u> </u>	Iools Help
Back Forward <sup>™</sup>	Address 🙆 null&customerRequirementID=null&activityTypeID=1&activityID=-938690403&criteria=%25 💌 🔗 Go
Ohioedge®	jtodak J Todak/Horn & Todak <u>  Logoff</u>
CustomerPerson	Quick Links
Search Home   Maintain   List All	Home   Customer   Requirement   Contact   Buyer   Email   Letter   Campaign   Scenario   Activity   Report   Setup   ?
<u>Reset</u>	Active Session Information News
	Customer: Gunton Corp 26150 Richmond Rd, Cleveland, OH, 44146-1438, (Tel):330-831-1206 reset   Scenario: DH Central-Cold Call reset
Bookmarks	Content Management Maximize
List all activities.	Firstenber:Ms., Barbara F. Firstenberg, DirIS, Gunton Corp, 330-831-1206, 26150 Richmond Rd, Cleveland
	Copyright © 2001 Ohioedge. All Rights Reserved

Figure 26.

If the Sales Rep drills down on that link he/she can view detailed information of the contact such as the title, extensions, fax numbers and email address. The Sales Rep can update contacts or create new contacts.

🖉 CustomerPerson <- Ohioedge CRM - M	icrosoft Internet Explorer provided by America Online
<u> File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> e	lp 💦
Back Forward → W Address	🖹 ohioedge/j2ee/api/org/cust/person/CustomerPerson.jsp&customerPersonID=460048653 💌 🔗 Go 🛛 Links 🎽
Custom reset   C	er: Gunton Corp 26150 Richmond Rd, Cleveland, OH, 44146-1438, (Tel):330-831-1206 ontact: Firstenber reset email letter   Scenario: DH Central-Cold Call reset
Bookmarks Content	Management Maximize
List all activities. Name:	Miss 💌 Barbara 🛛 🖡 Firstenberg
Title:	Information Systems Director Select Title
usernar	ne:
passwo	rd:
Phone:	Ext
Phone_	2: Ext:
Fax:	
emailA	Idress: bfirstenberg@gunton.com
SMTP	Server:
Setting	🛍 Username: 📃 Password:
	Create Update Delete Reset
	Opennicht @ 2004 Obligades - All Dichts Research
	Copyright @ 2001 Ohloedge. All Rights Reserved
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Figure 27.

Going back to the Activity screen where the Sales Rep started, note that now the snap shot – Figure 28, shows the bottom part of the Activity screen.

SchDate field is nothing but the current date and time automatically displayed. Most of the times a Sales Rep will not modify this field's contents unless he/she say needs to schedule to call a contact on a certain day and time. If the Sales Rep makes that cold call and the party is interested in receiving some literature then from the drop-down box NextProc the user chooses the appropriate next ActivityType, which in this case would be "Literature Requested". It is Ohioedge CRM+BPMServer administrator's job to setup activity types, business model, flow logic, etc. Note the link at the bottom part of the screen, it displays the information about who assigned this activity to the Sales Rep.

🛎 Activity <- Ohioedge CRM - I	Microsoft Internet Explorer provided by America Online	_ 8 ×
<u>F</u> ile <u>E</u> dit <u>V</u> iew F <u>a</u> vorites	<u>I</u> ools <u>H</u> elp	Â
Grand Sorward	Address 🙋 t=Set&listName=Activity&objectToSet=ValueObject&urlAction=Edit&activityID=-938690403 💌 🔗	io Links »
	notes	<b></b>
	SchDate 2002-08-28 11:53:45.781	
	NextProc	
	Make a cold phone call. Literature requested <u>A Not interested.</u>	
	activityStatusType: Create	
	-938690403:Assigned->Tolitodakl->Bylinternall:Comments:Assigned by Ohioedge	
	Workflow handler. Notes:	
	Copyright © 2001 Ohioedge. All Rights Reserved	
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@]	🗐 Local intra	net

Figure 28.

After the Sales Rep makes the Cold Call, to mark the end of the activity he/she needs to sign-off the activity. To do this the Sales Rep needs to drill down on the link at the bottom part of the Activity screen.

The next figure shows a drop down box where the user needs to select Sign-off privilege and hit create. The word "Sign-off" is used to mark the end of an activity. For customization and definition please contact your Ohioedge CRM+BPM Server administrator.

🕗 Assignment <- Ohioedge CRI	M - Microsoft Internet Explorer provided by America Online	В×
<u>F</u> ile <u>E</u> dit <u>V</u> iew F <u>a</u> vorites	<u>L</u> ools <u>H</u> elp	Â
Back Forward × ×	Address 🛃 lueObject&urlAction=Edit&listName=Assignment&activityID=-938690403&assigneeID=1300 💌 🔗 Go	» Links
Ohioedge®	jtodak J Todak/Horn & Todak <u>  Logoff</u>	<b></b>
Assignment	Quick Links	- 1
Search <u>Home</u>   <u>Maintain</u>   <u>List All</u>	Home   Customer   Requirement   Contact   Buyer   Email   Letter   Campaign   Scenario   Activity   Report   Setup   ?	
<u>Reset</u>	Active Session Information News	- 1
	Customer: Gunton Corp 26150 Richmond Rd, Cleveland, OH, 44146-1438, (Tel):330-831-1206 reset   Contact: Firstenber reset email letter   Scenario: DH Central-Cold Call reset	
Bookmarks	Content Management Maximize	
	AssignmentMaintainAlias::Assignment management services require Assignor privilege. Status Management Activity has the sign-off status  Create	
	Copyright © 2001 Onlocage. All Rights Reserved	•
🥙 Done	📃 📃 Local intranet	

Figure 29.

After marking the end of the activity, automatically this activity performed against the customer "Gunton" will be routed to the next ActivityType, which the SalesRep had selected to be Literature requested. So now if the same daily report is run again, note how the activity now appears in the Literature requested category.

🕘 ScenarioInputFactory <- Ohio	oedge CRM - Microsoft Internet Explorer provided by America Online			<u>- 8 ×</u>
<u>F</u> ile <u>E</u> dit <u>V</u> iew F <u>a</u> vorites	<u>I</u> ools <u>H</u> elp			Â
Back Forward	Address 🛃 bject&urlAction=Report&listName=ScenarioInputFactory&inputFactoryID=1&scenario	arioID=2 💌	∂Go	Links
DUUKIIIdINS	сонтент манауеттент тахитись			
	DH -Central			
	DH Central-Order Complete			
	DH Central-Accounting			
	DH Central-Production			
	DH Central-Engineering Review			
	DH Central-Email Literature			
	DH Central-Literature Requested			
	08/28/02 LtrReq , Gunton Corp, 330-831-1206, 26150 Richmond Rd, Cleveland :: Comments: Created by automatic feeder program.Send literature Notes:null			
	DH Central-Follow Call			
	08/20/02 <b>FollowCall</b> , Guild International Inc, 440-232-5887, 7273 Division St, Cleveland :: Comments: Created by automatic feeder program. Notes:null			
	DH Central-Shipping			
	DH Central-Cold Call			
	DH Central-Not Interested			
	DH Central-Receive Order			
	DH Central-Print Literature			
	DH Central-Sales Call			
Copyright © 2001 Ohioedge. All Rights Reserved				
🕗 Done		📑 Local	intranet	

Figure 30.

## Email Template:

Email Templates automate the e-mailing activity. Please contact your Ohioedge

CRM+BPM Server administrator to setup bulk e-mailing campaigns. The following figure

shows one such email where at runtime the email address of the contact, name, date, etc

tags are replaced by the actual information.

🔨 OhioedgeSales - Microsoft	t Internet Explorer	🔳 🖻 🗙			
File Edit View Favorites To	pols Help	A.			
Ohioedge®	j	jdoe John Doe   <u>Logoff</u>			
Email	Quick Links				
Search	Home   Scenario   Customer   Requirement   Contact   Buyer   Activity   Email   Letter   Setup   🥇				
Home   Maintain   List All	Active Session Information	News			
Treset	Customer: Midwest Towing 12567 Header Dr. Cleveland, OH, 44115. (Tel):2167893200 reset   Requireme JP232 reset   Buyer: Mr., Ron T. Richardson reset email letter	nt:			
Bookmarks	Content Management M	aximize			
	T0: rrichardson@midwesttc				
	CC:				
	BCC:				
	Subject: Ohioedge information email template				
	Attachments:				
	Message: Dear Mr Richardson, As we talked over the phone on MM/dd/yy, I am attaching our company literature for your reference. You can also visit us online at www.ohioedge.com. Founded in 1996, Ohioedge is an Oracle Business Send Reset Recreate				
Copyright © 2001 Ohioedge. All Rights Reserved					
		✓			

Figure 31.

# Letter Template:

Letter templates publish data in the web-browser. The following figure shows an envelope where at runtime the address of the contact, name, etc tags are replaced by the actual information.



Figure 32.

# Summary

This manual should make a business user familiar with the core functionality of Ohioedge CRM+BPM Server. Effort has been made to anticipate logical navigation of a business user through the application depending upon the user's role within the organization. Business Cases are added to illustrate most common application usage.

Free Manuals Download Website <u>http://myh66.com</u> <u>http://usermanuals.us</u> <u>http://www.somanuals.com</u> <u>http://www.4manuals.cc</u> <u>http://www.4manuals.cc</u> <u>http://www.4manuals.cc</u> <u>http://www.4manuals.com</u> <u>http://www.404manual.com</u> <u>http://www.luxmanual.com</u> <u>http://aubethermostatmanual.com</u> Golf course search by state

http://golfingnear.com Email search by domain

http://emailbydomain.com Auto manuals search

http://auto.somanuals.com TV manuals search

http://tv.somanuals.com