CRM & Orders Primer

CRM:

The ESP® CRM (Customer Relationship Manager) keeps all your important contacts, like prospects, customers, suppliers, decorators or any company or person, in one place.

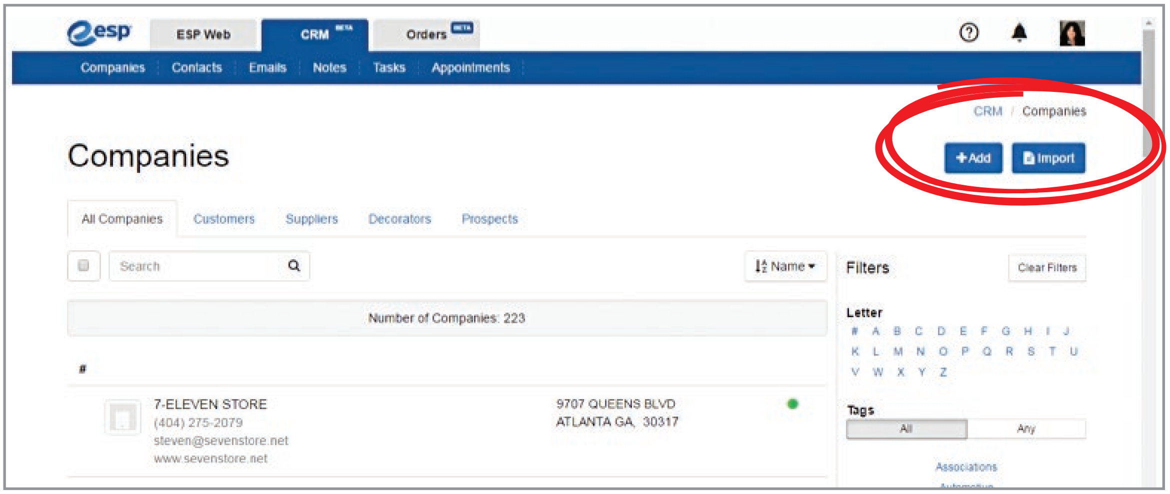
CRM houses all of the standard contact information you would expect (name, company, addresses, telephone numbers) as well as all your notes, tasks, emails, presentations and orders associated with each contact, giving you a complete history at a glance.

Here's how it works:

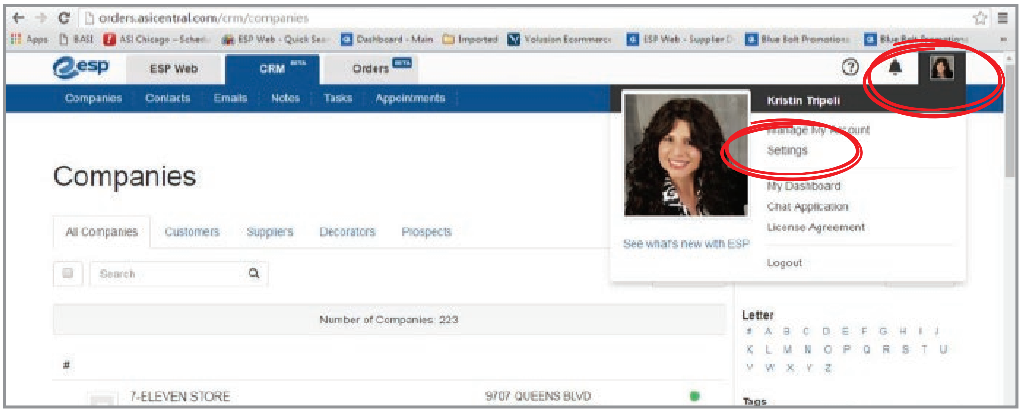
Adding Contacts

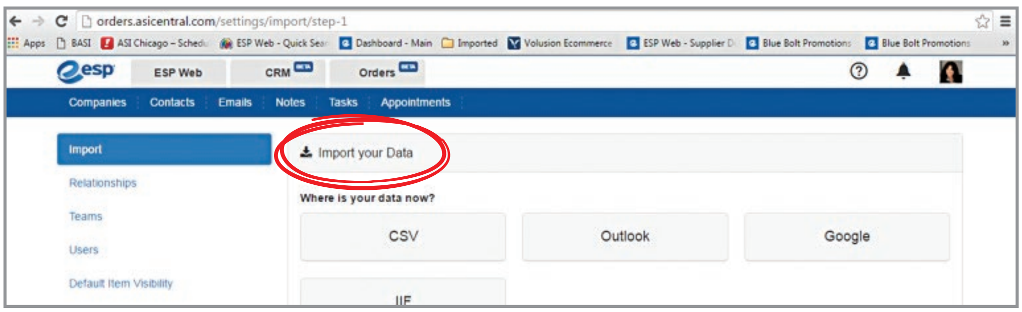
1. Current ESP Web® users will find that their preferred vendors and clients (all those associated with Projects and Presentations) have been automatically uploaded into CRM for them.

2. To begin adding a new contact, start with the blue "Add" button located in the top right corner. Want to add multiple contacts? No sweat! Use the blue "Import" button to add multiple contacts simultaneously from a CSV, Outlook, Google or IIF file.

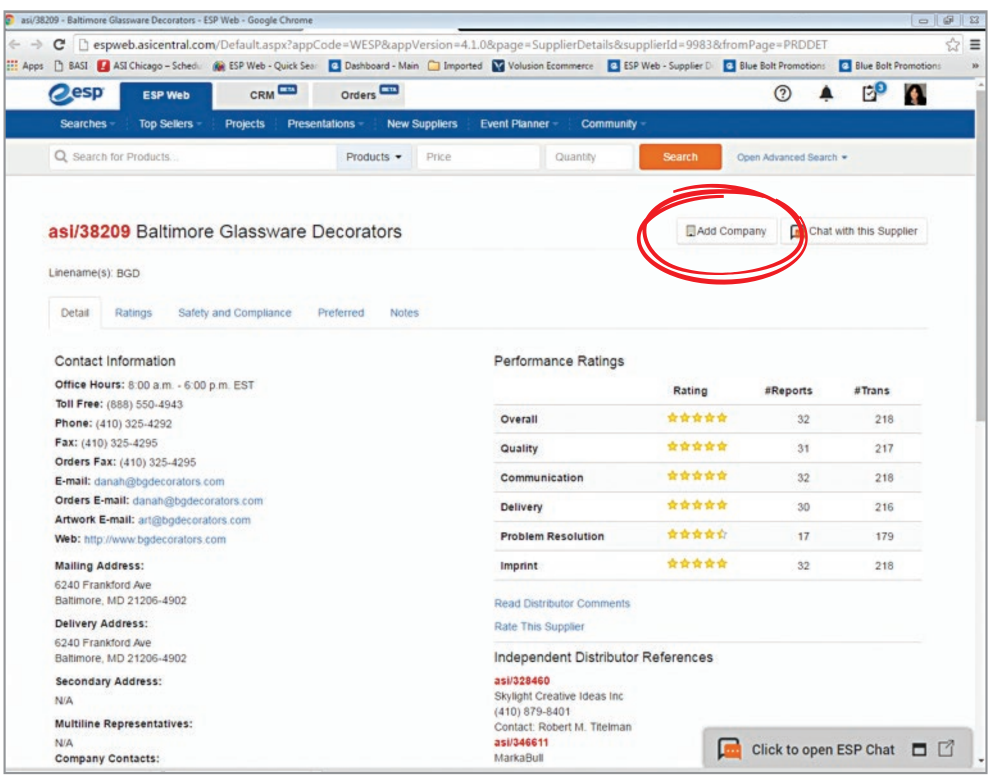


3. You can also upload contacts to your CRM from a CSV, Outlook, Google or IIF file by clicking on the "CRM" tab, going to the "User" icon in the top right corner, clicking on "Settings" and clicking on the appropriate buttons in the "Import" menu.



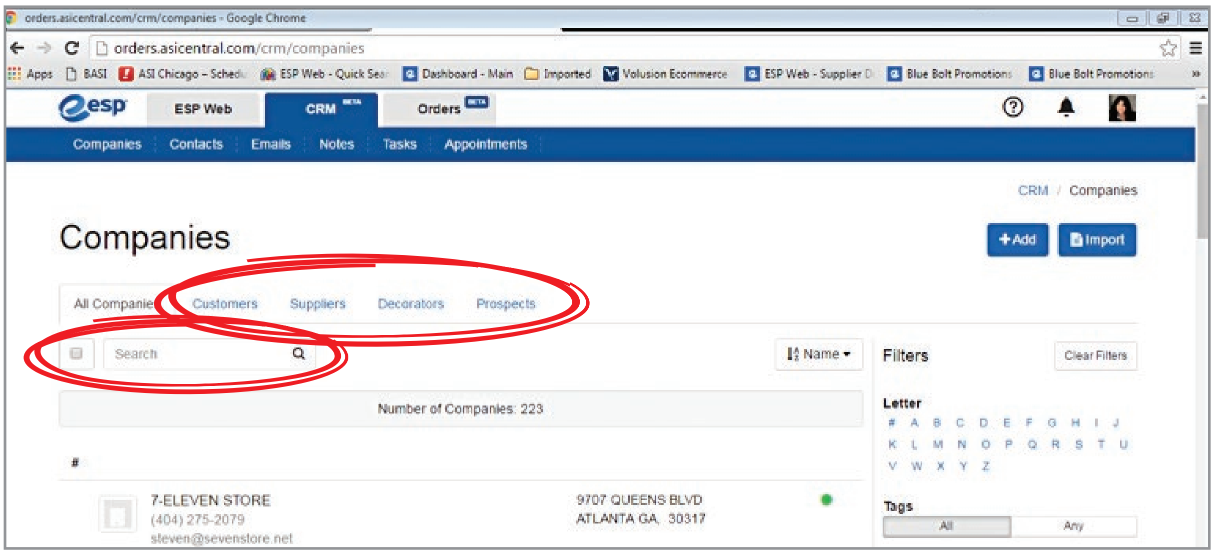


4. Suppliers can be added directly from ESP® by going to the Supplier Detail page and clicking on "Add Company" in the top right corner.

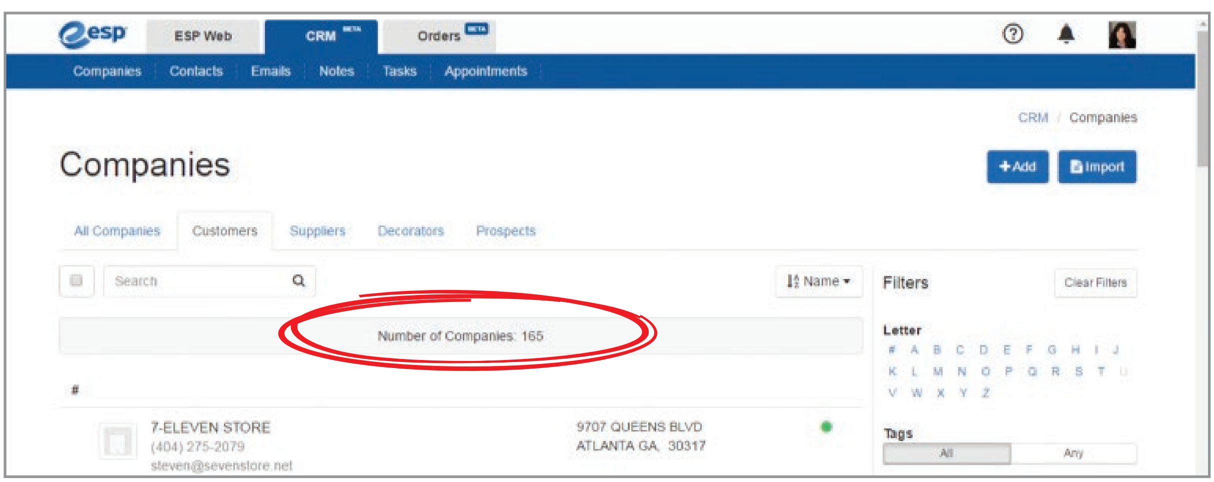


Navigating Within CRM

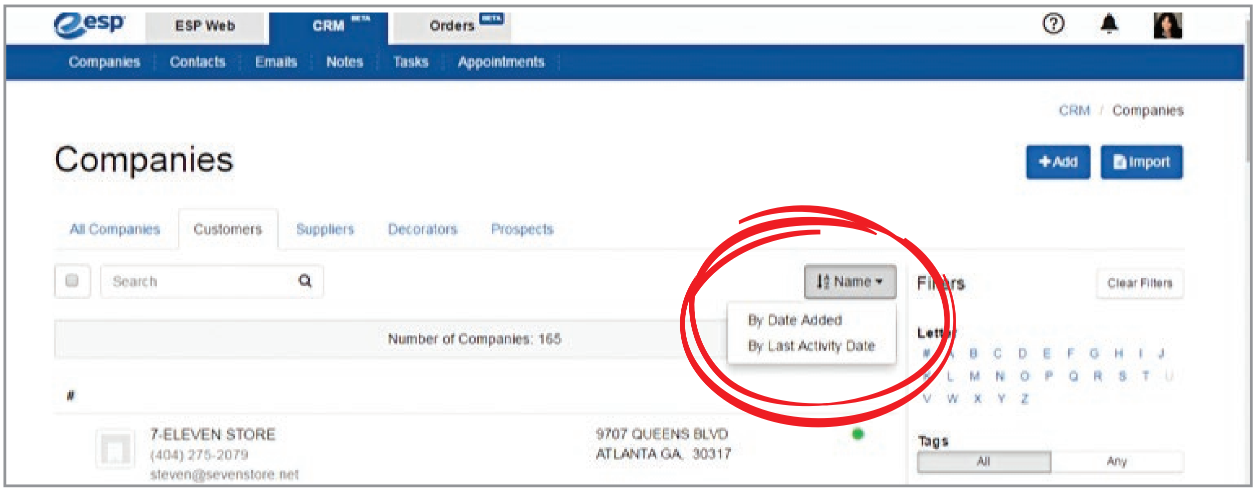
1. Search for companies by using the Search box, or by clicking on the appropriate tabs (Customers, Suppliers, Decorators, Prospects).



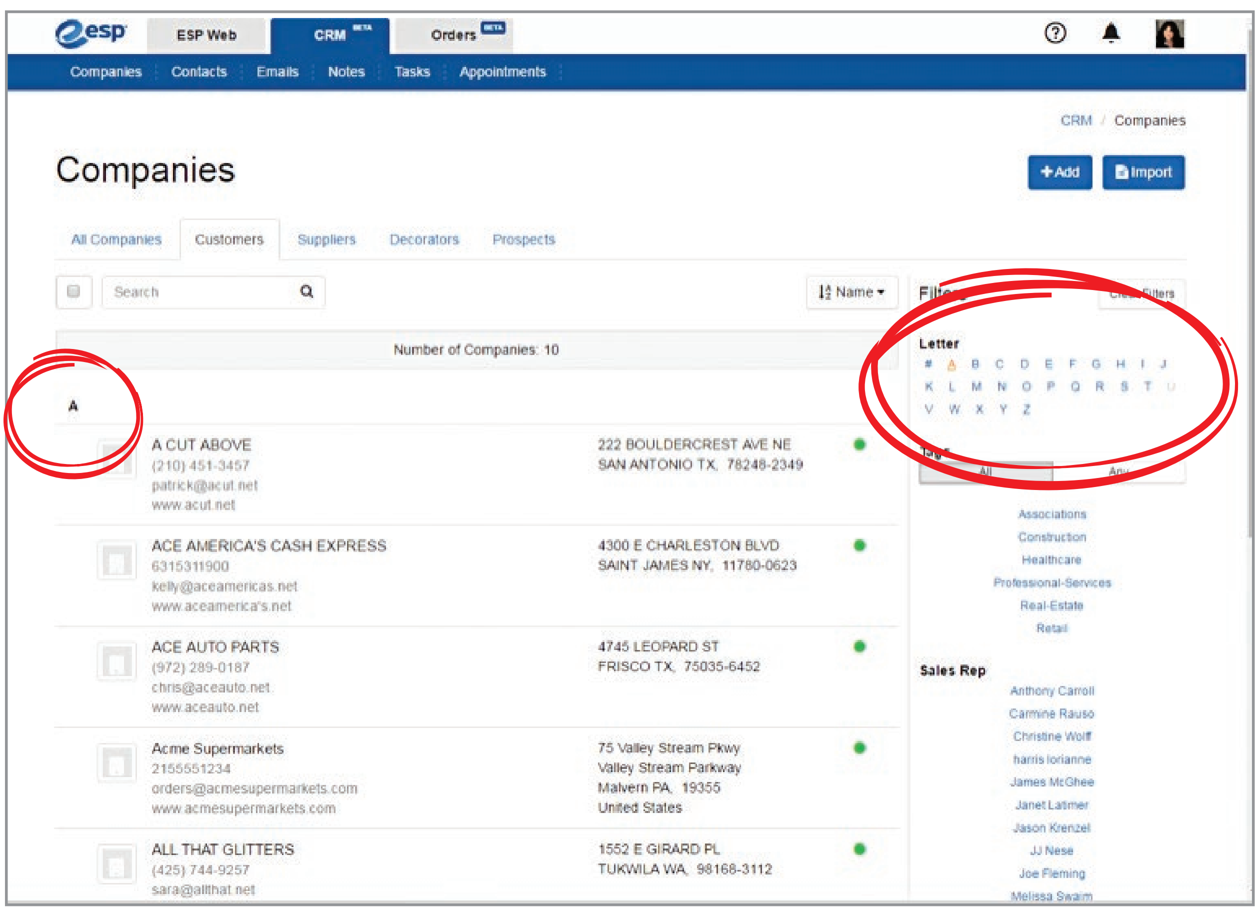
2. Clicking on each tab (Customers, Suppliers, Decorators, Prospects) displays the number of contacts in each area.



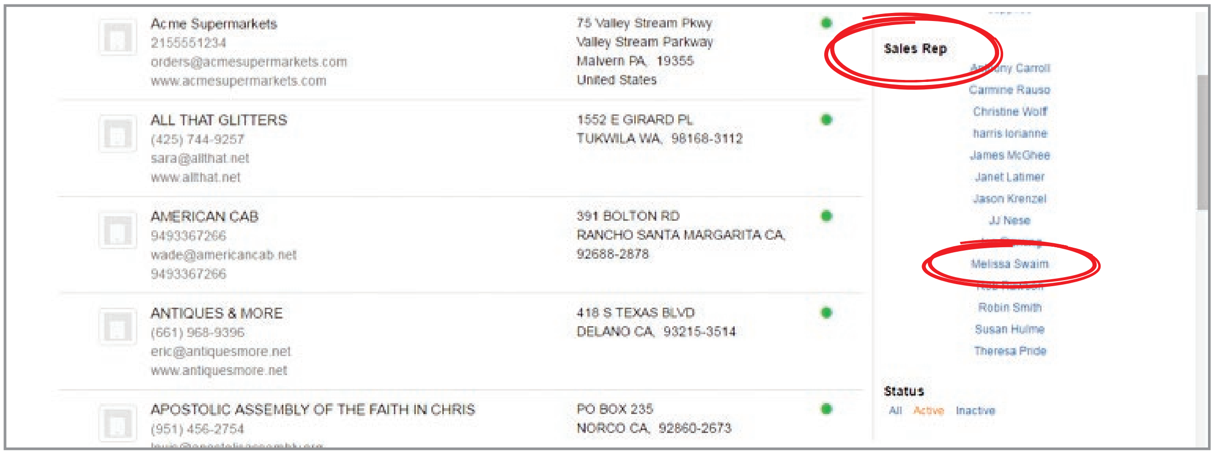
3. You can filter results by Date Added or Last Activity Date.

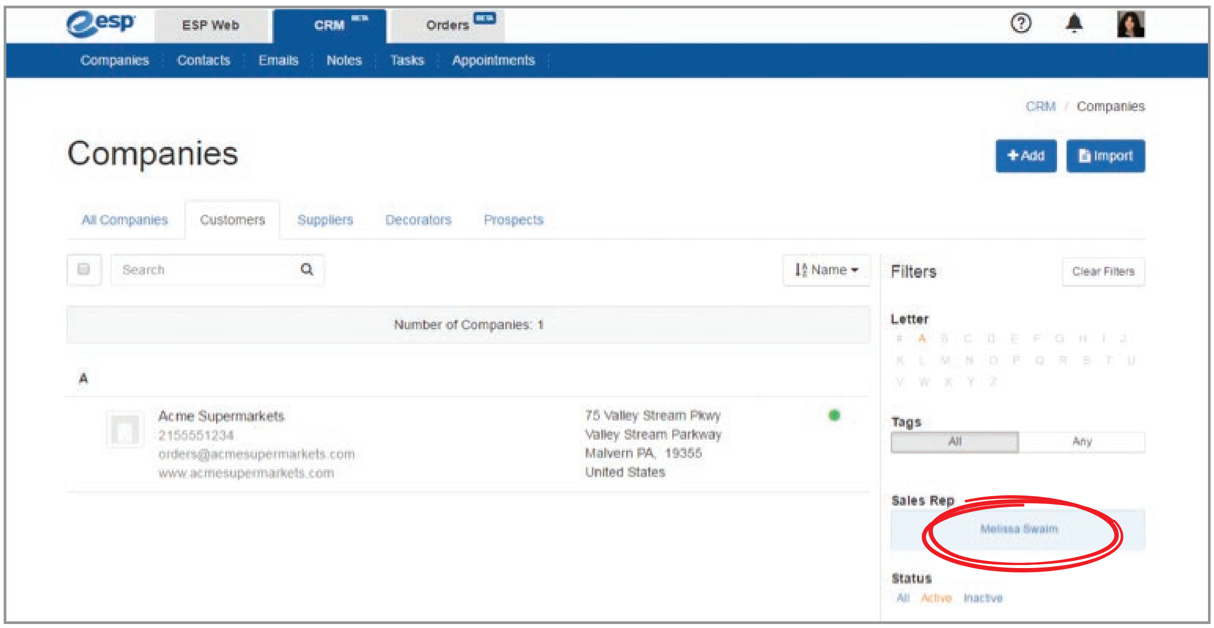


4. Click on a letter and all contacts beginning with that letter appear.

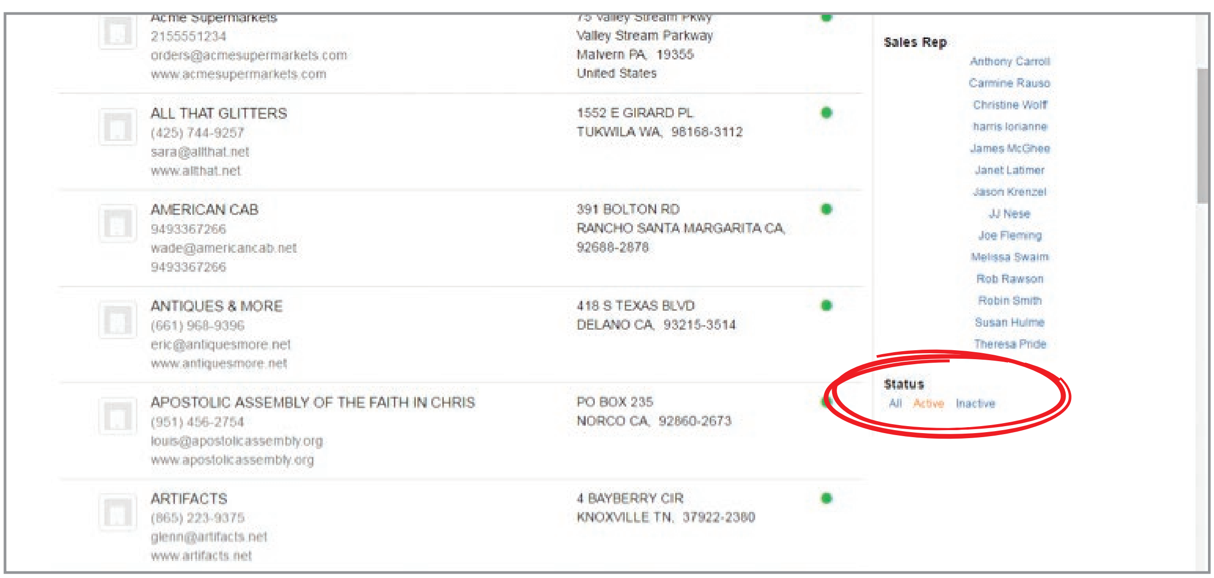


5. You can also search by sales rep. Simply click on a name under the Sales Rep field and all contacts associated with that person will appear.

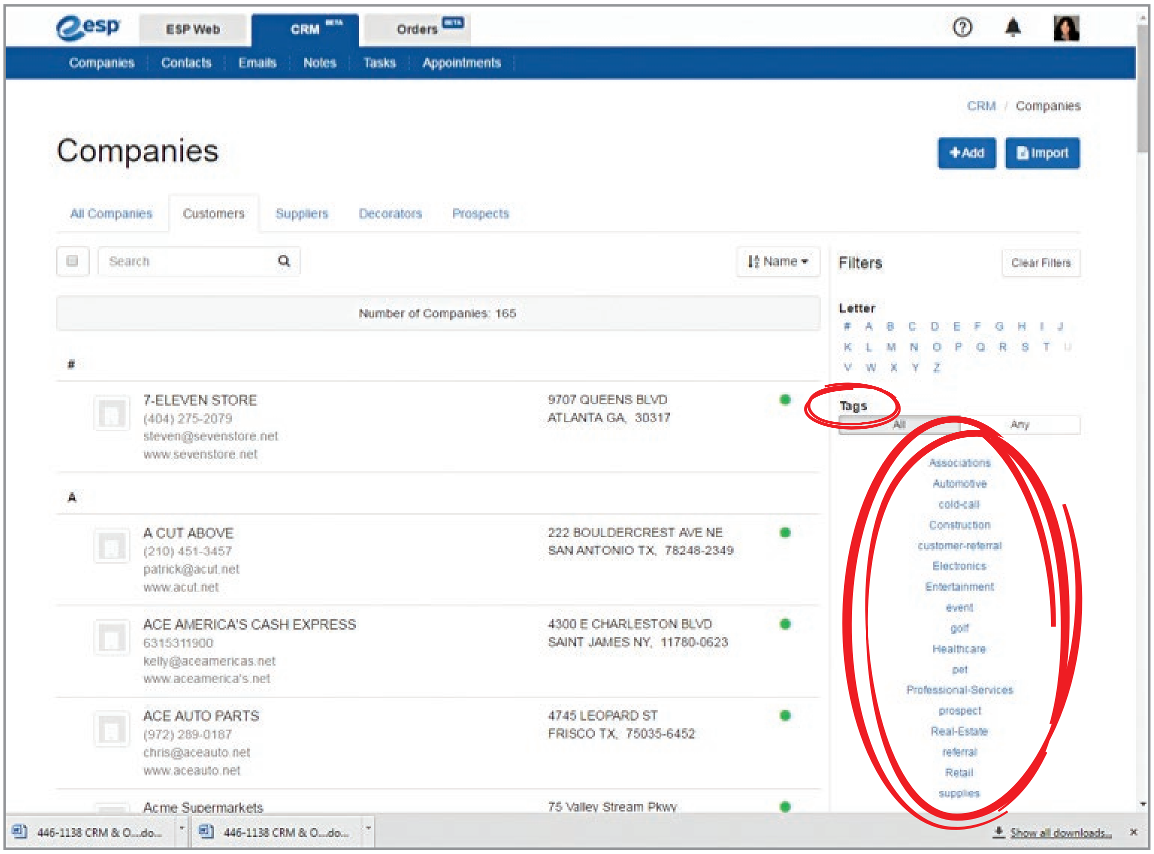




6. Click on All, Active or Inactive under Status to view contacts in those categories.

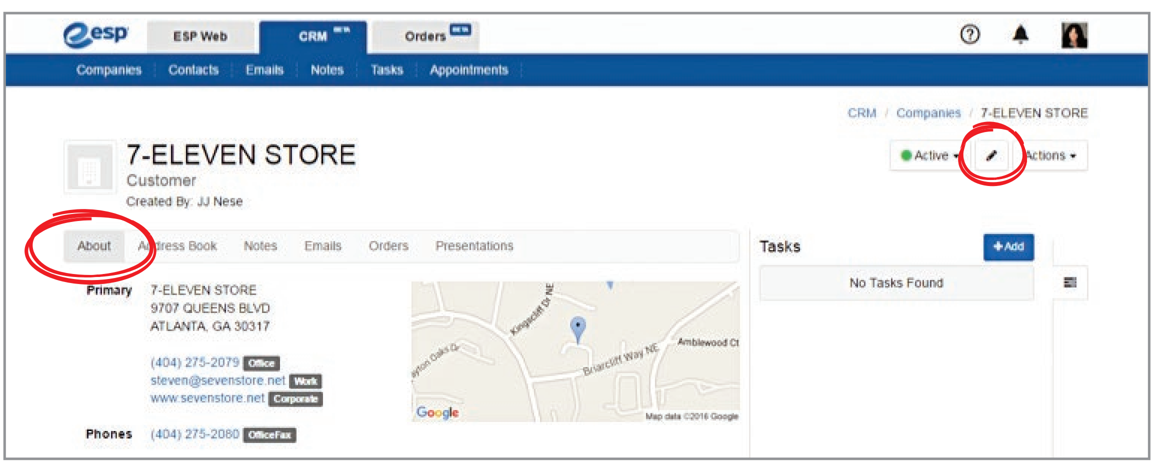


7. CRM lets you "tag" contacts into groups with labels such as "Referral" or "Health Care" so you can easily locate all companies in your CRM with any given tag at a later point in time. This helps you find groups of people and companies quickly, which is especially helpful if you are doing a targeted marketing campaign.

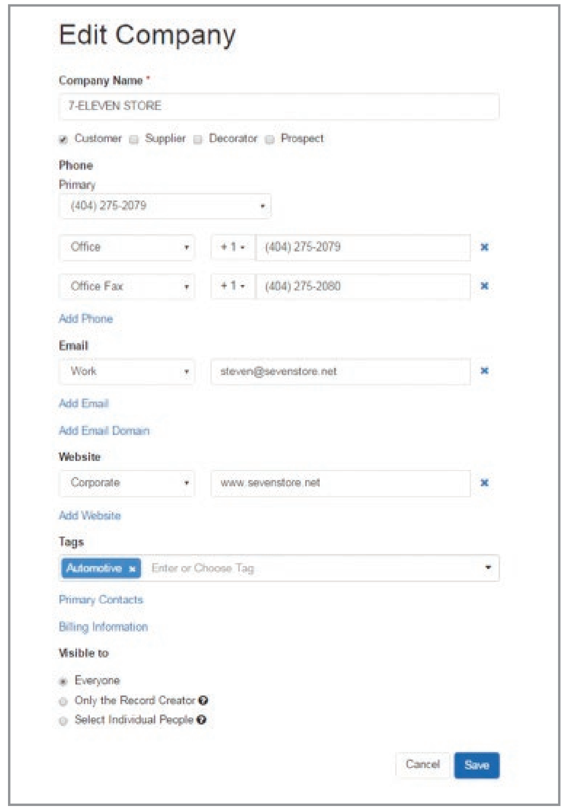


Contact or Company Record Details

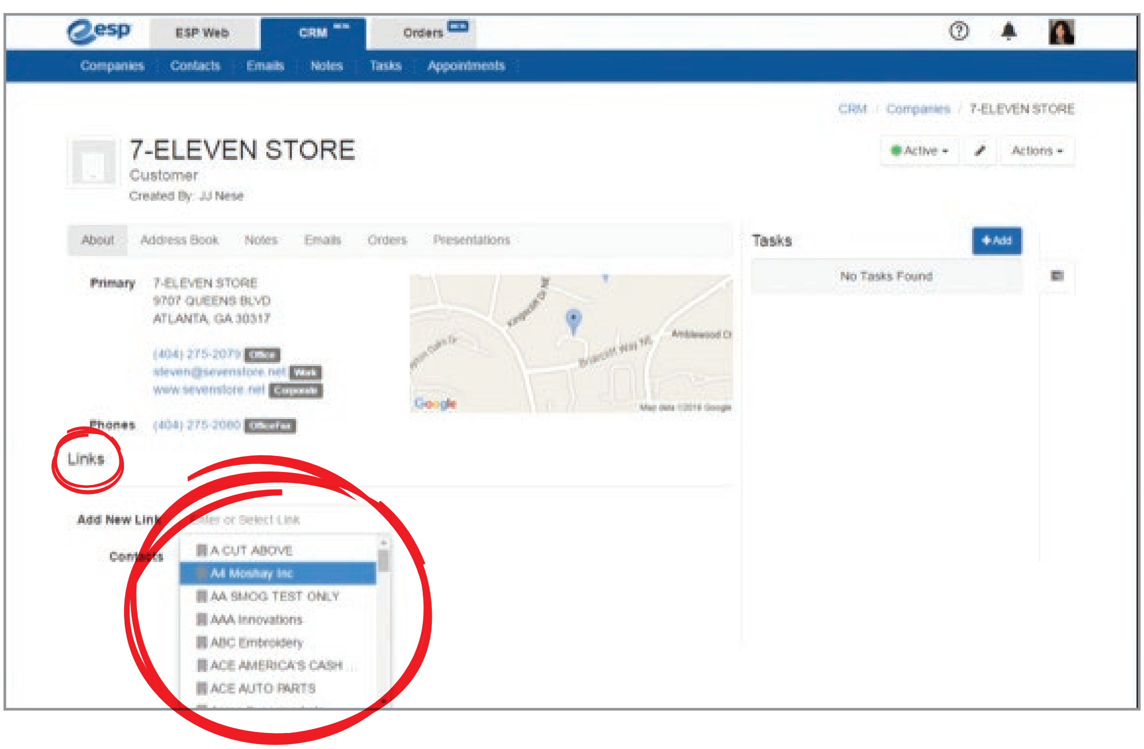
1. ABOUT – This area displays the basic info for a contact or company. Edit by clicking on the pencil icon in the top right corner.



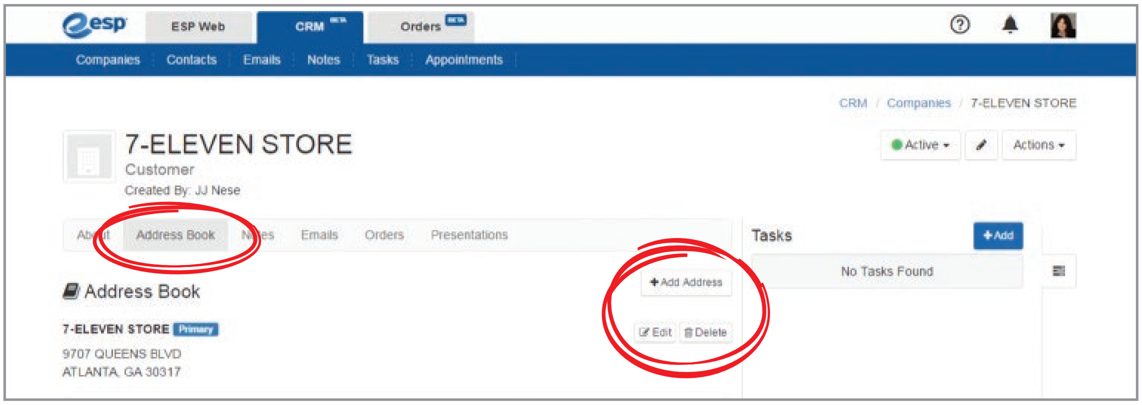
2. Once in edit mode, you can
    a. Check the box indicating what category the contact belongs to: Customer, Supplier, Decorator or Prospect.
    b. Add additional phone numbers, fax numbers, etc.
    c. Add additional email addresses or domains
    d. Add website addresses
    e. Tag contacts with labels so you can easily find all companies in your CRM with any given tag. Enter your own tag or choose one from the drop-down menu and save.
    f. Add or edit primary contacts
    g. Add or edit billing information
    h. Indicate visibility of contact/company (Visible to Everyone, Only the Record Creator or Select Individual People)
    i. When finished, click "Save."



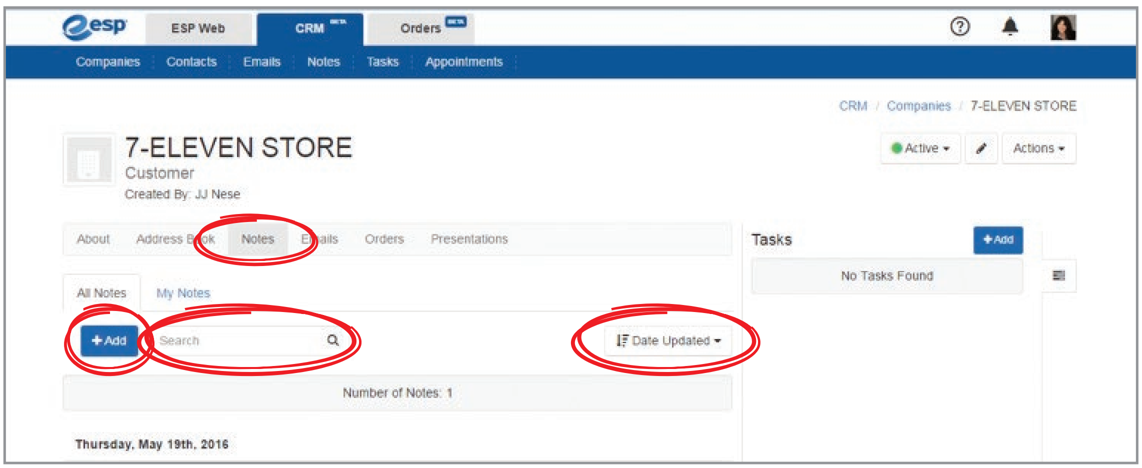
3. You can also add links to the record, associating contacts with companies, or companies with other companies, or contacts with other contacts. Enter the information or select from the drop-down menu.



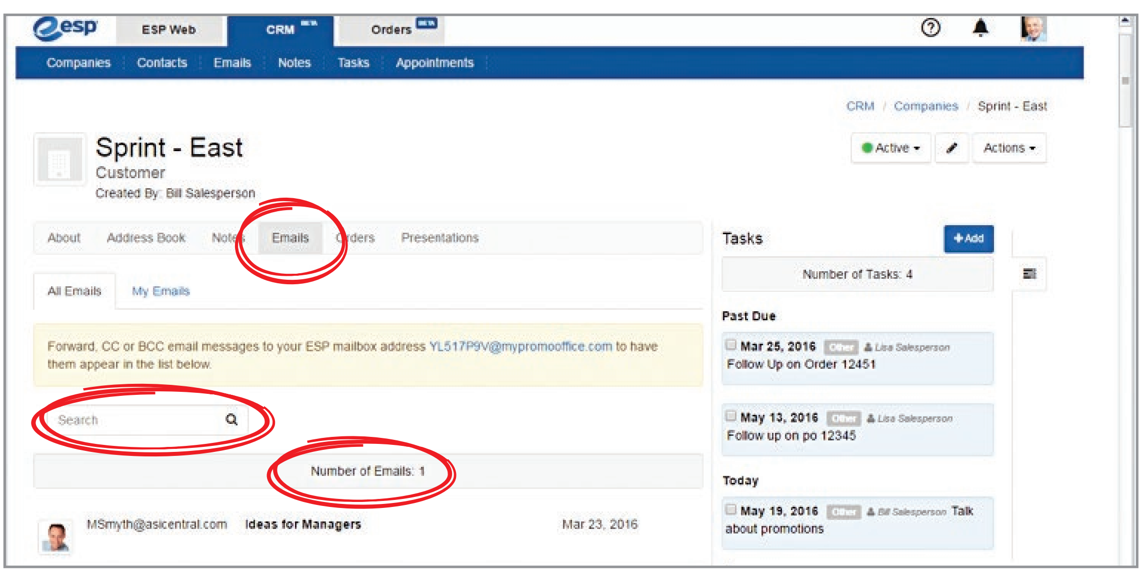
4. ADDRESS BOOK – Here, you are able to add or edit address info and store multiple addresses.



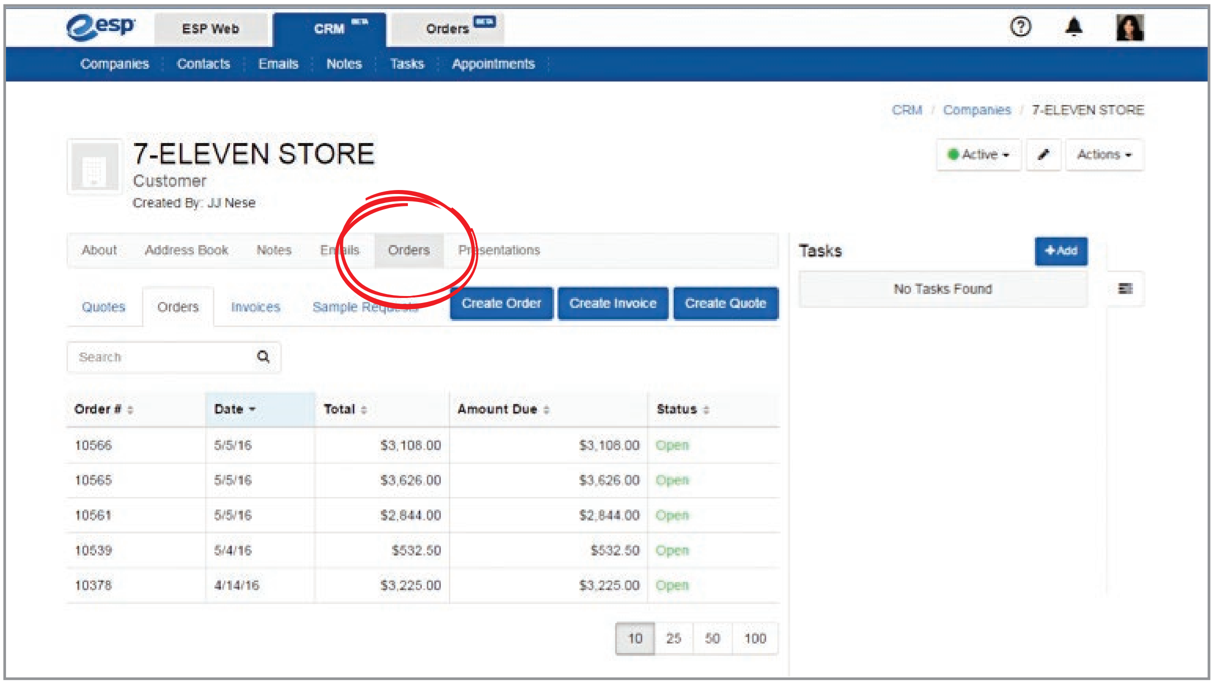
5. NOTES – Add unlimited notes on each contact or company. CRM allows you to sort notes by date added, and also search within notes.



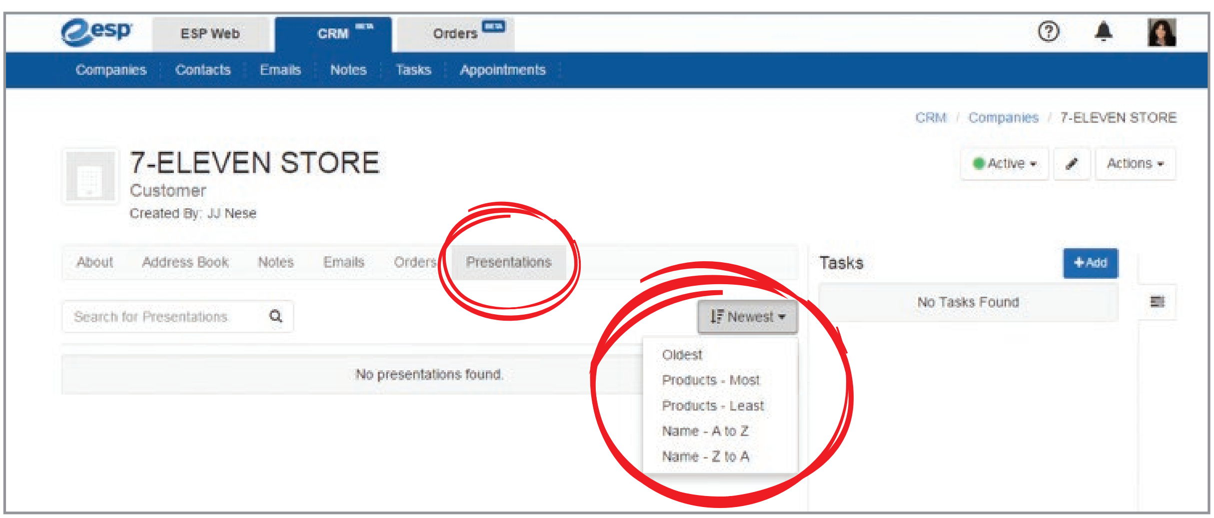
6. EMAILS – All CRM users have a unique email address associated with their account (xxxx@mypromooffice.com). When emailing someone outside of ESP, forward, CC or BCC this unique email address, and all of your email correspondence will be stored with the appropriate contact/company in ESP CRM. You can search emails as well.



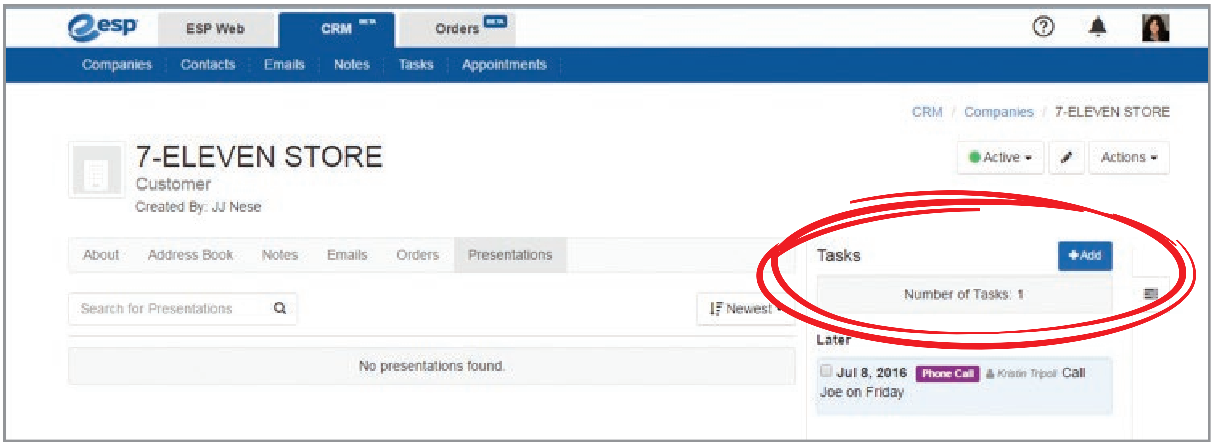
7. ORDERS – Quickly view all Quotes, Orders, Invoices and Sample Requests associated with each contact/company. You can also begin an order, invoice or quote from inside a contact/company record by clicking on the Create Order, Create Invoice or Create Quote buttons. Watch the fields of these forms automatically populate with the info from your CRM.



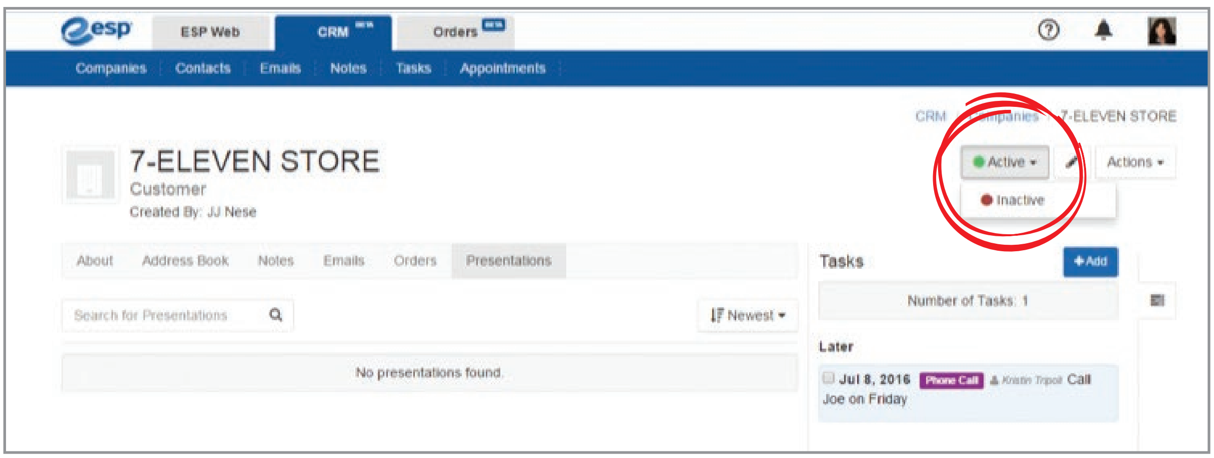
8. PRESENTATIONS – Any presentations you've created or sent to any given contact/company will appear in the associated record. Sort presentations alphabetically, by date added or by products. Search for presentations using keywords.



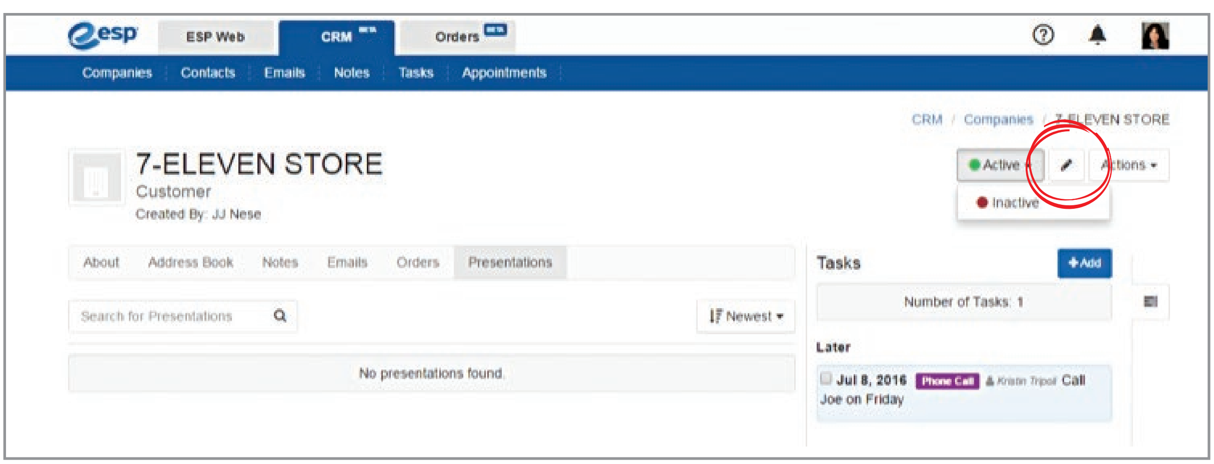
9. TASKS – On any tab in the record, you can always add Tasks by clicking on the blue +Add button.



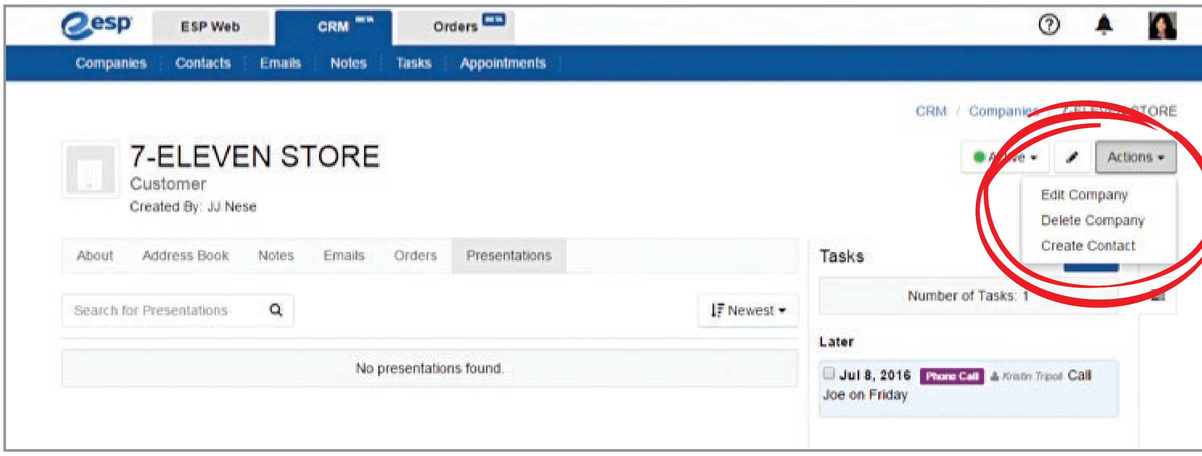
10. ACTIVE/INACTIVE – Indicate whether the contact/company is Active or Inactive using the drop-down menu in the top right corner.



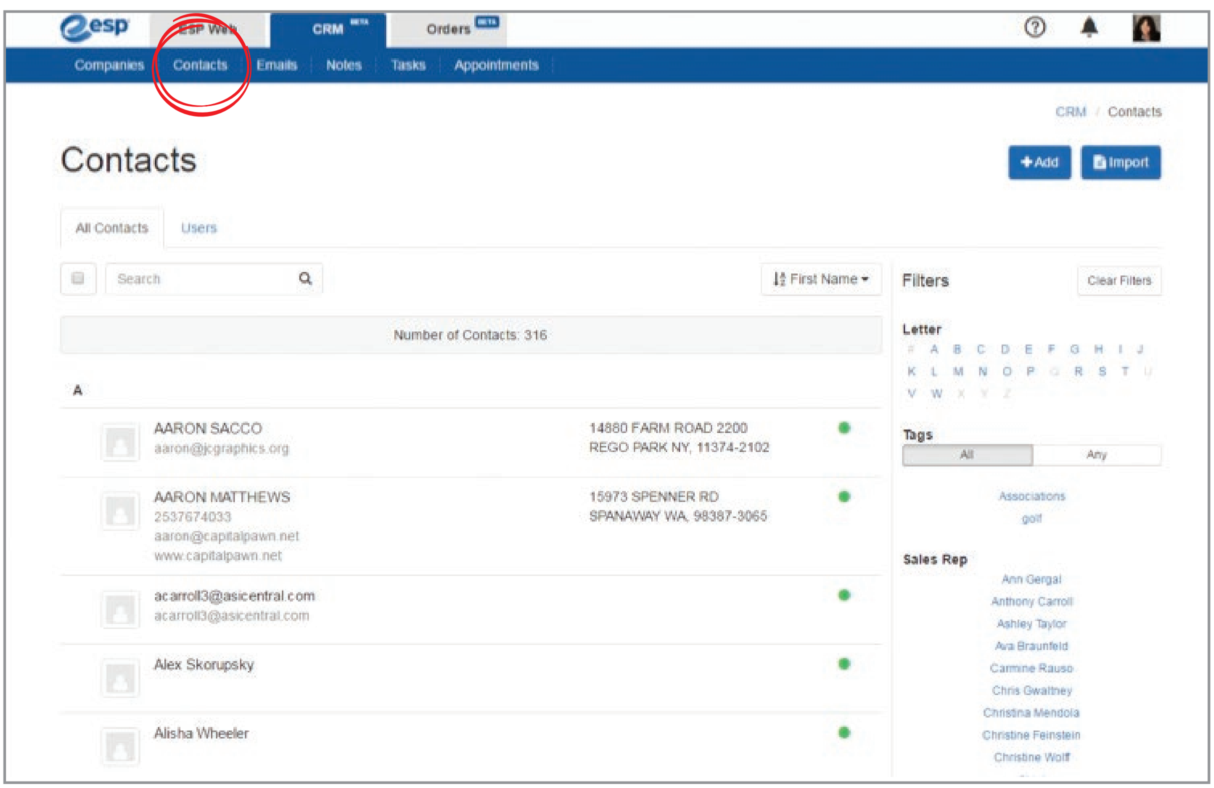
11. EDITING CONTACTS/COMPANIES – The pencil icon in the top right corner allows you to edit.



12. ACTIONS – The Actions drop-down menu in the top right corner allows you to Edit, Delete or Add contacts/companies.

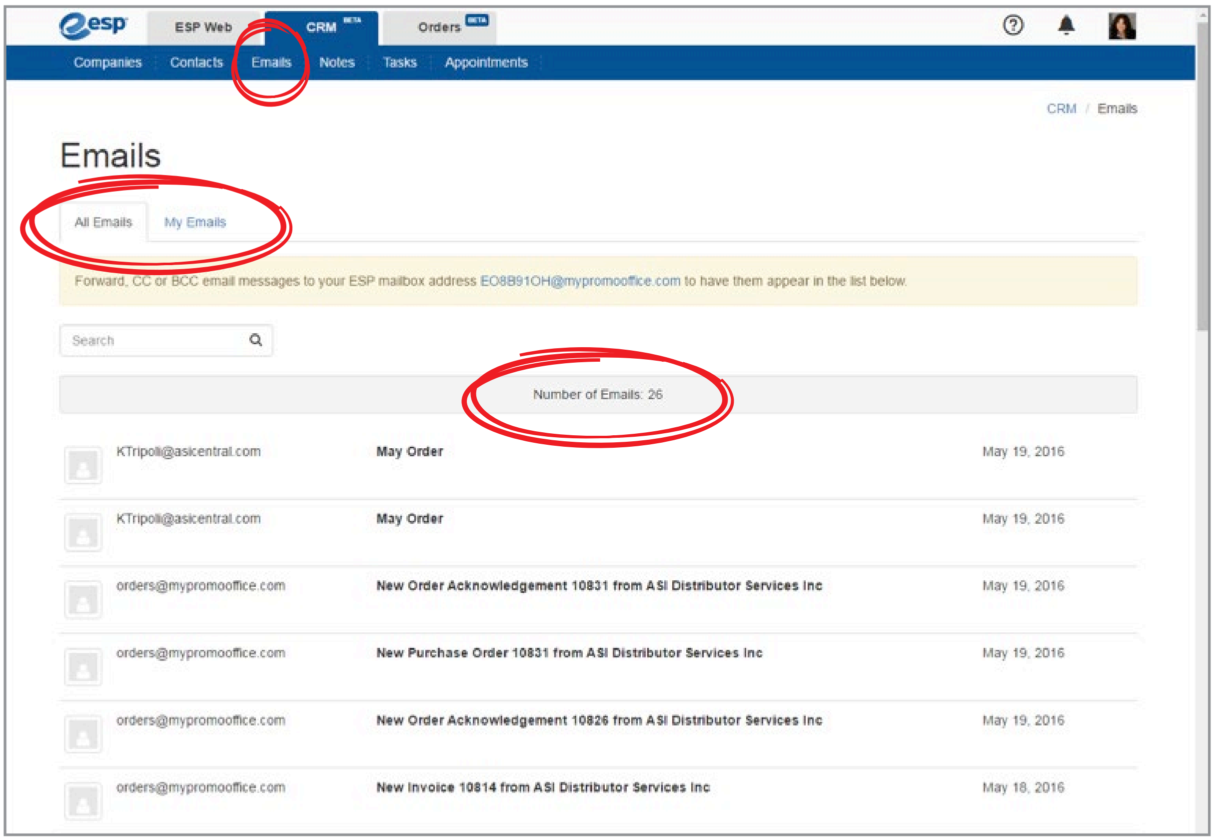


13. CONTACTS – The Contacts menu operates the same way as the Companies menu, except there are no Orders or Presentations associated with Contacts (people), as they are associated with Companies (businesses).



Emails

1. Every CRM user has a unique email address that is associated with their account (xxxx@mypromooffice.com). When emailing someone outside of ESP, forward, CC or BCC this unique email address, and all of your email correspondence will be stored with the appropriate contact/company in ESP CRM as well as under the Emails tab on the main menu. You can search through your messages using keywords. Tabs are broken out between All Emails (which would include any visible vendor, customer and prospect emails sent or received by anyone in your company) and My Emails (only the emails you personally send and receive).

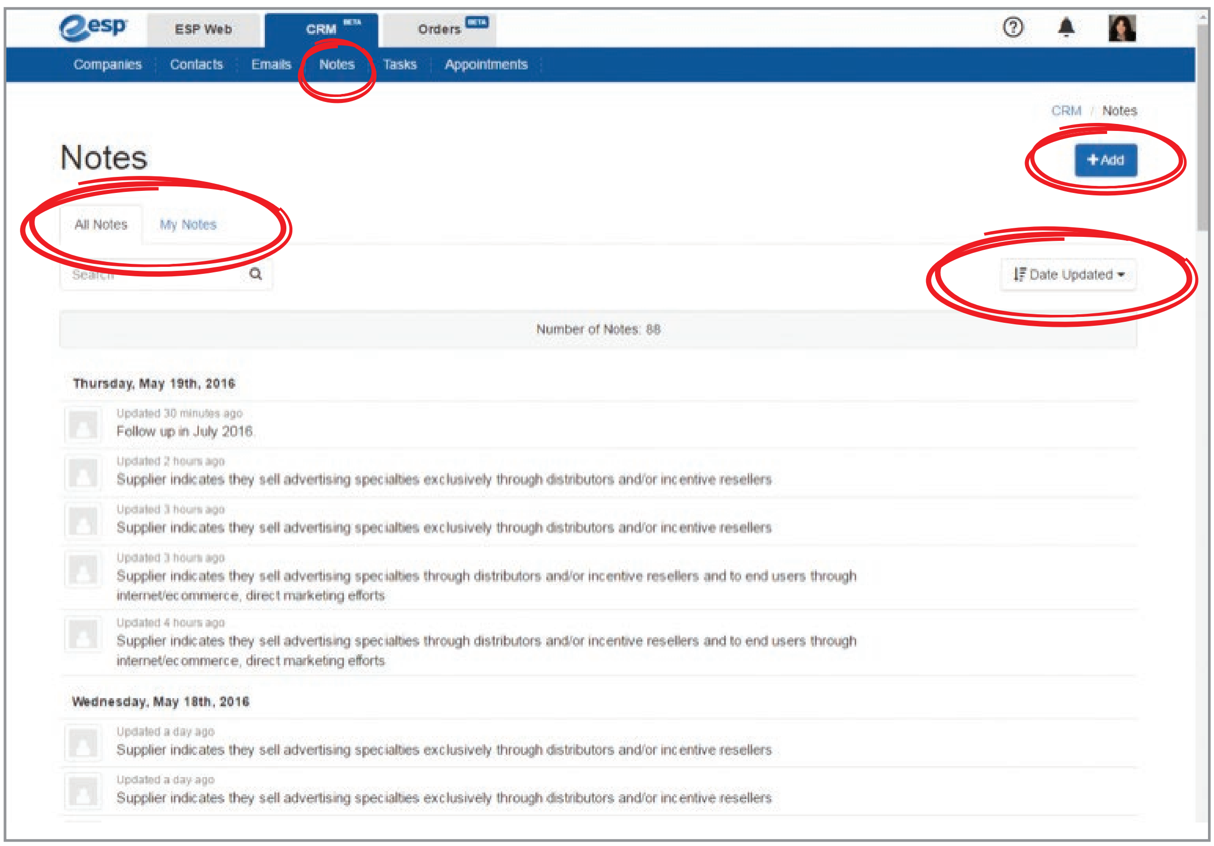


Notes

1. Notes are divided into two segments – All Notes and My Notes. All Notes includes any visible note entered by anyone in the company, while My Notes displays only the notes you've entered. Notes are displayed by either Date Added or Date Updated.

2. Notes can be edited or deleted. To do so, hover your mouse to the right of the note and two icons will appear – a pencil icon and a trash can icon. Edit notes with the pencil icon and delete notes with the trash can icon. Or simply click on a Note and the icons appear in the top right corner of a new window alongside the Note you're working on.

3. Add a note by clicking on the blue +Add button in the top right corner. As you add notes, you can link them to contacts or companies and indicate who can see them by clicking on Everyone, Only the Record Creator or Select Individual People.



Tasks

1. Tasks are divided into All Tasks (company-wide Tasks that are visible), My Tasks (your own) and My Delegated Tasks (Tasks you've created and assigned to others in your company). Each of these areas allow Tasks to be searched with keywords.

2. Add a task by clicking on the blue +Add button in the top right corner. A pop-up window opens where you give the Task a name, put it in a Category (email, phone call, meeting, etc.), assign it to yourself or to another person in your company, give it a due date, link it to a company or contact, mark Visibility as Public or Private and give it a brief description. Hit Save to create the new task.

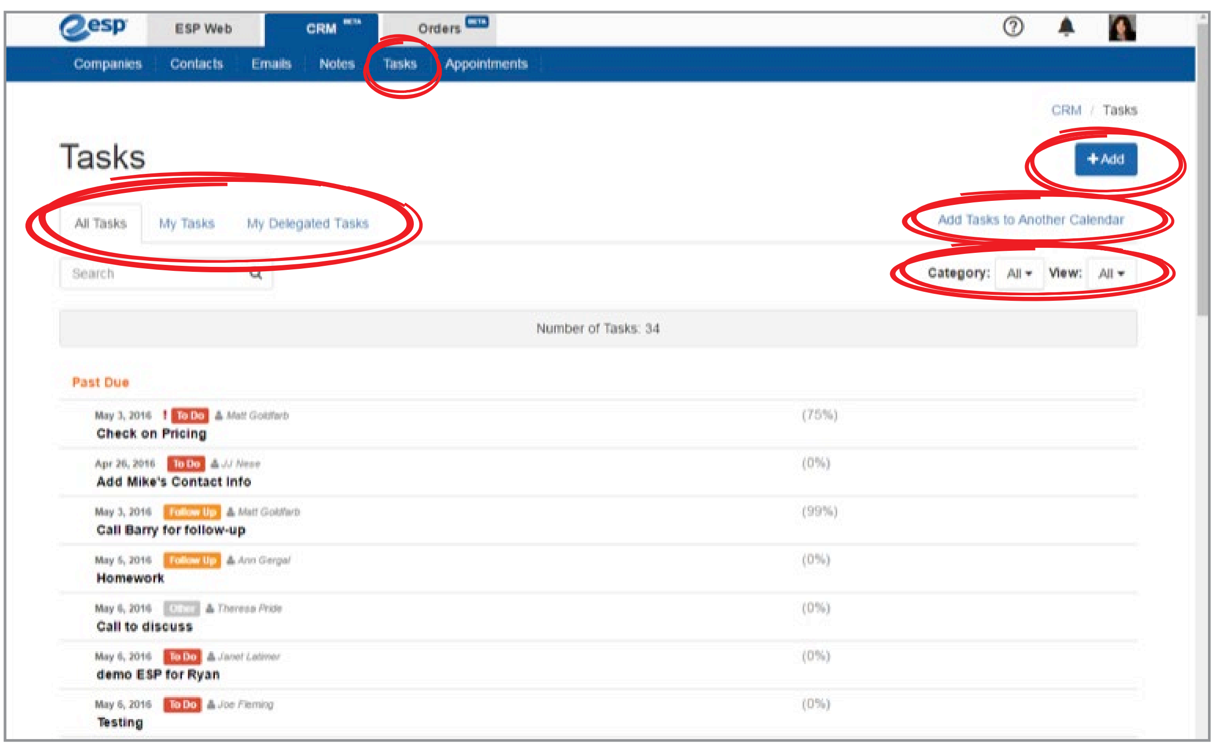
3. Tasks may be viewed by Category or by Open, Completed or All status.

4. Tasks display with Past Due appearing first, followed by Today, Tomorrow and Next Week.

5. Tasks may be edited or deleted by hovering your mouse to the right of the Task and two icons will appear – a pencil icon and a trash can icon. Edit Tasks with the pencil icon and delete Tasks with the trash can icon. Or simply click on a Task and the icons appear in the top right corner of a new window alongside the Task you're working on.

6. When editing a Task, there is an Additional Information link under the Due Date field. Click on it to enter Start Date, Progress, Priority and Status, if needed.

7. You can add your Tasks to another calendar by clicking on the Add Tasks to Another Calendar link in the top right corner. A pop-up box with instructions will appear.

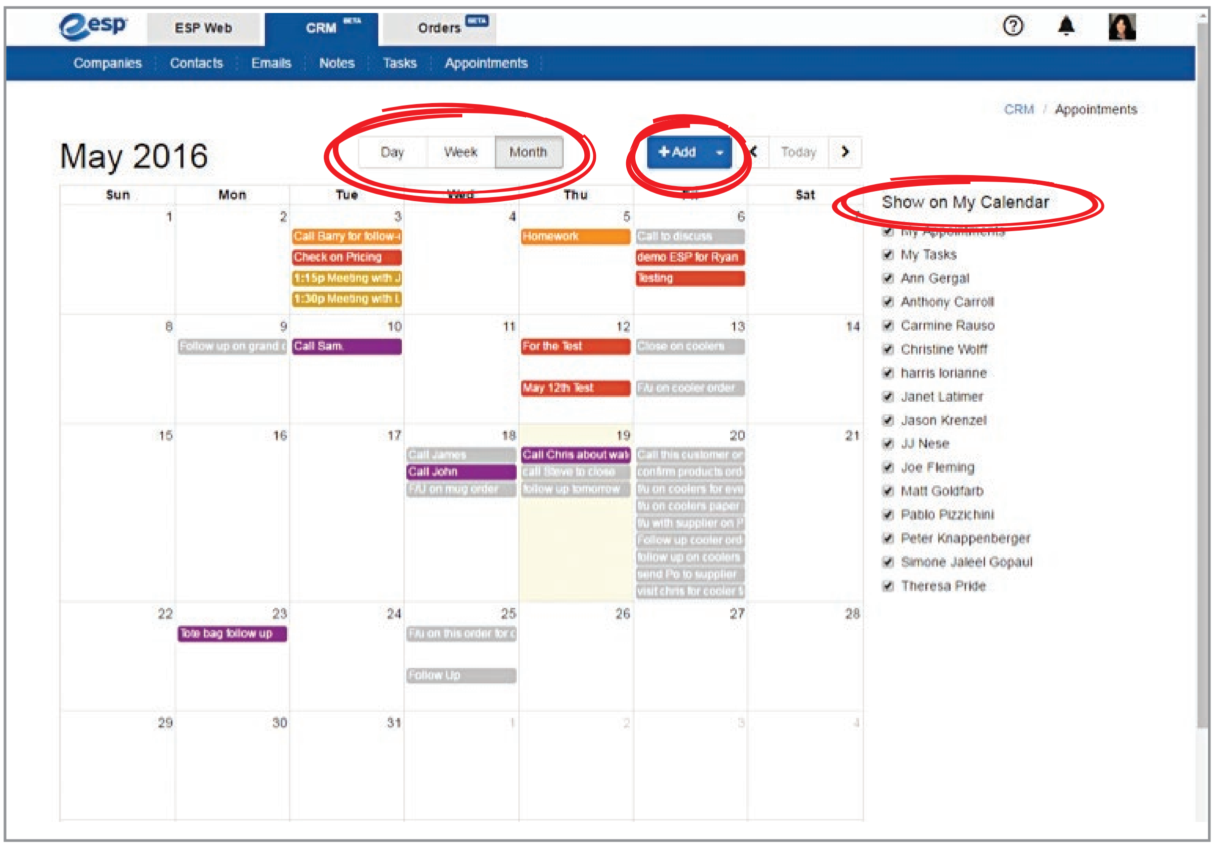


Appointments

1. The Appointments tab takes you to a calendar where you can display your view by Day, Week or Month.

2. Using the menu on the right side, you can choose what you would and would not like to display. You can display your Tasks and Appointments by clicking on those options.

3. You can add new Appointments or Tasks by clicking on the blue +Add button at the top of the page. Use the drop-down arrow to choose Appointment or Task. Follow the prompts in the pop-up window. For Appointments, add a Title, Location, Start and End Time, Description, mark Visibility and even set an Alert. For Tasks, add a Task Name, Category, Assigned To, Due Date, Links, Visibility and Description.



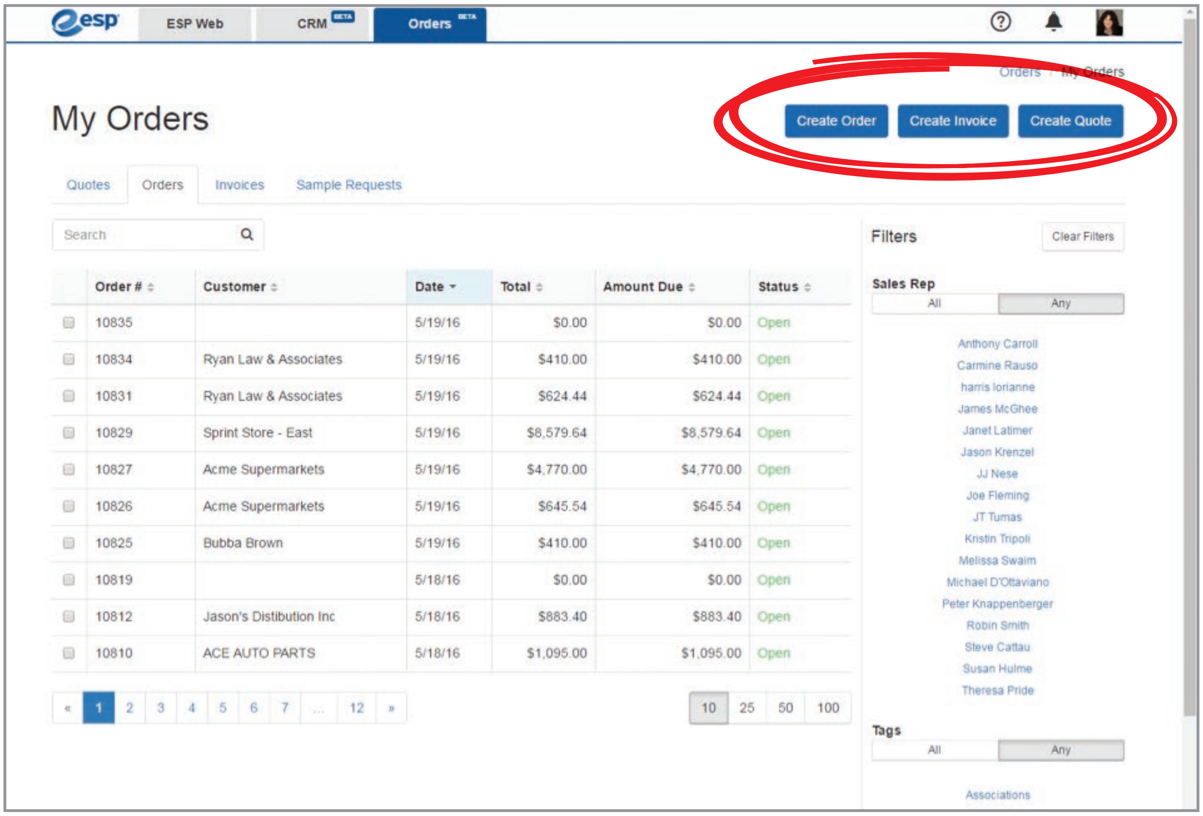
Orders:

ESP Orders stores all your Quotes, Orders, Invoices and Sample Requests in one centralized hub. You can also create a new Order, Invoice or Quote from any page in the Orders module, or directly from ESP.

Here's how it works:

Creating New Orders from Inside the Orders Module

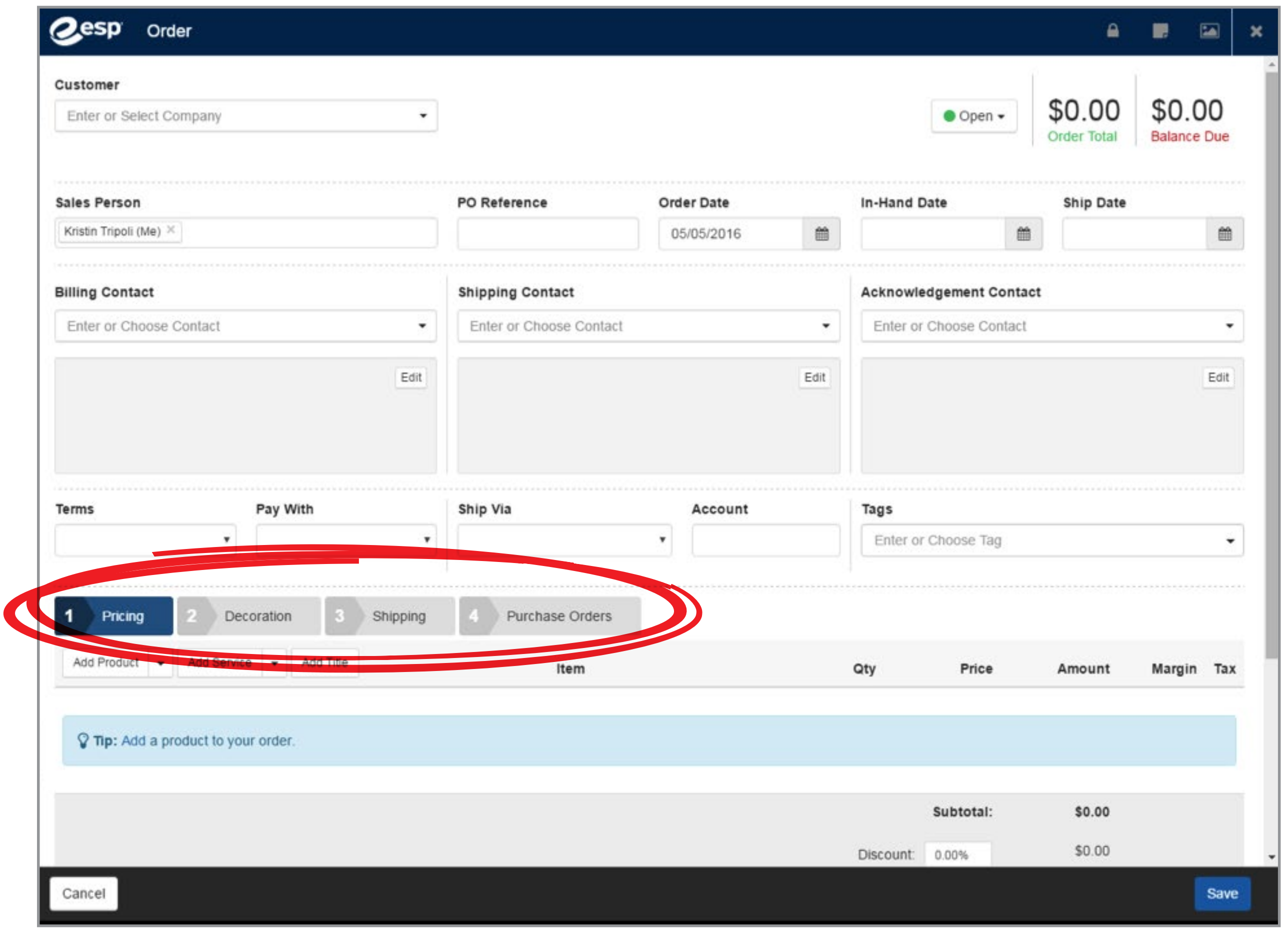
1. In the top right corner of every page in the Orders module, you will see three blue buttons, "Create Order," "Create Invoice" and "Create Quote." Click on the appropriate button to get started.



2. Click on “Create Order”.

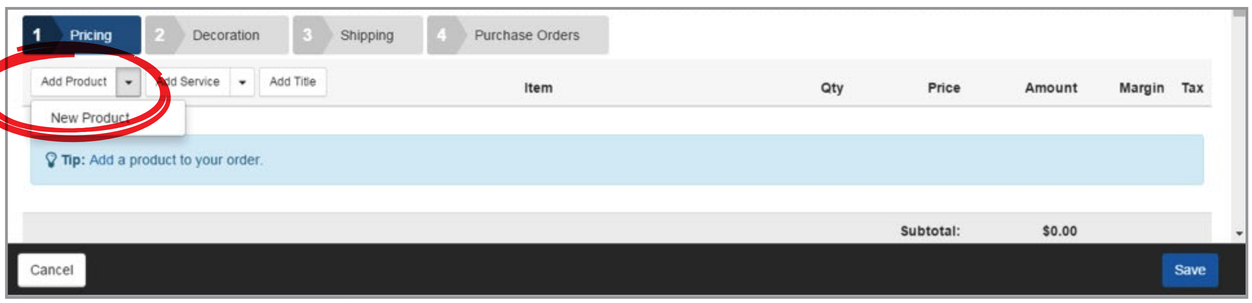
Your screen will show a field for Customer. Enter the customer name or select a contact from your CRM. If the contact was pulled from your CRM, every data point that you have in the CRM record will automatically populate in the appropriate field in your new Order. Many of the remaining fields have drop-down menus for quick and easy Order creation.

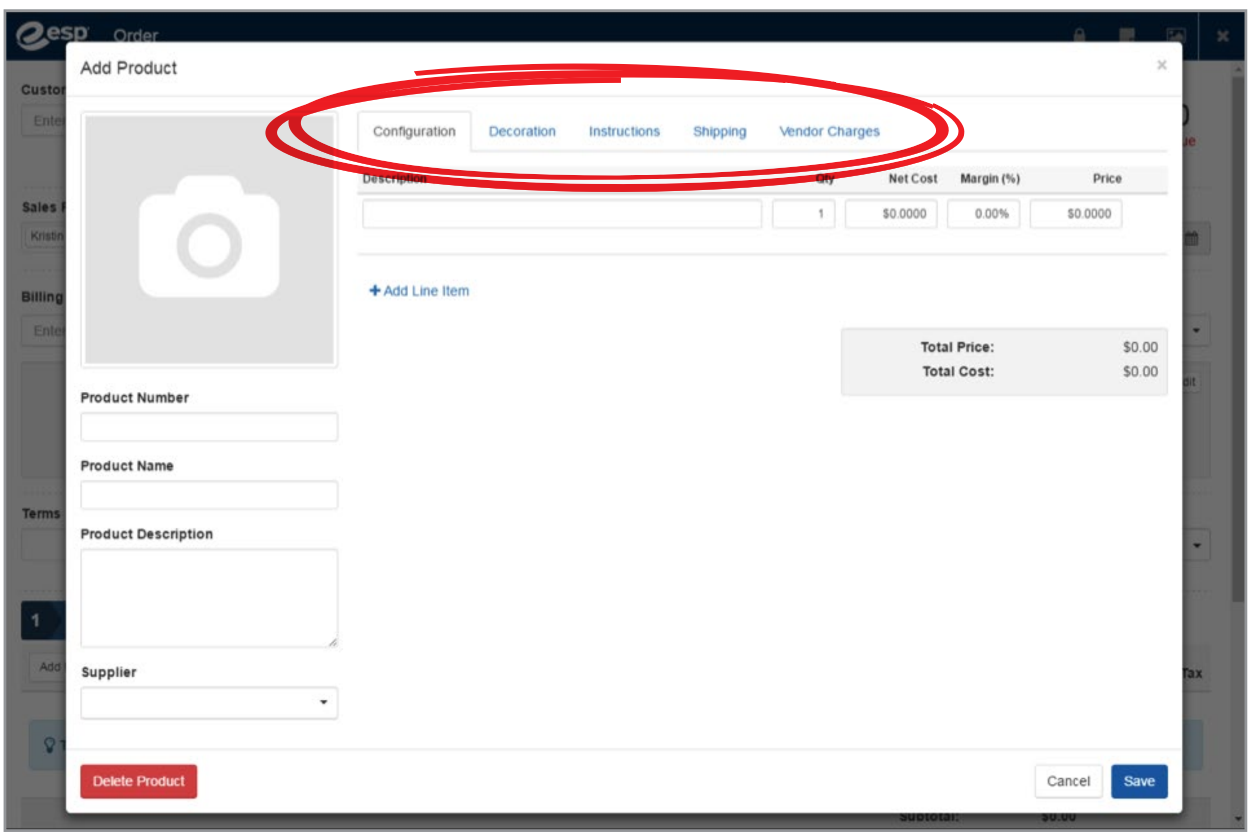
You will notice four steps to complete your Order across the bottom of the page. These are Pricing, Decoration, Shipping and Purchase Orders.



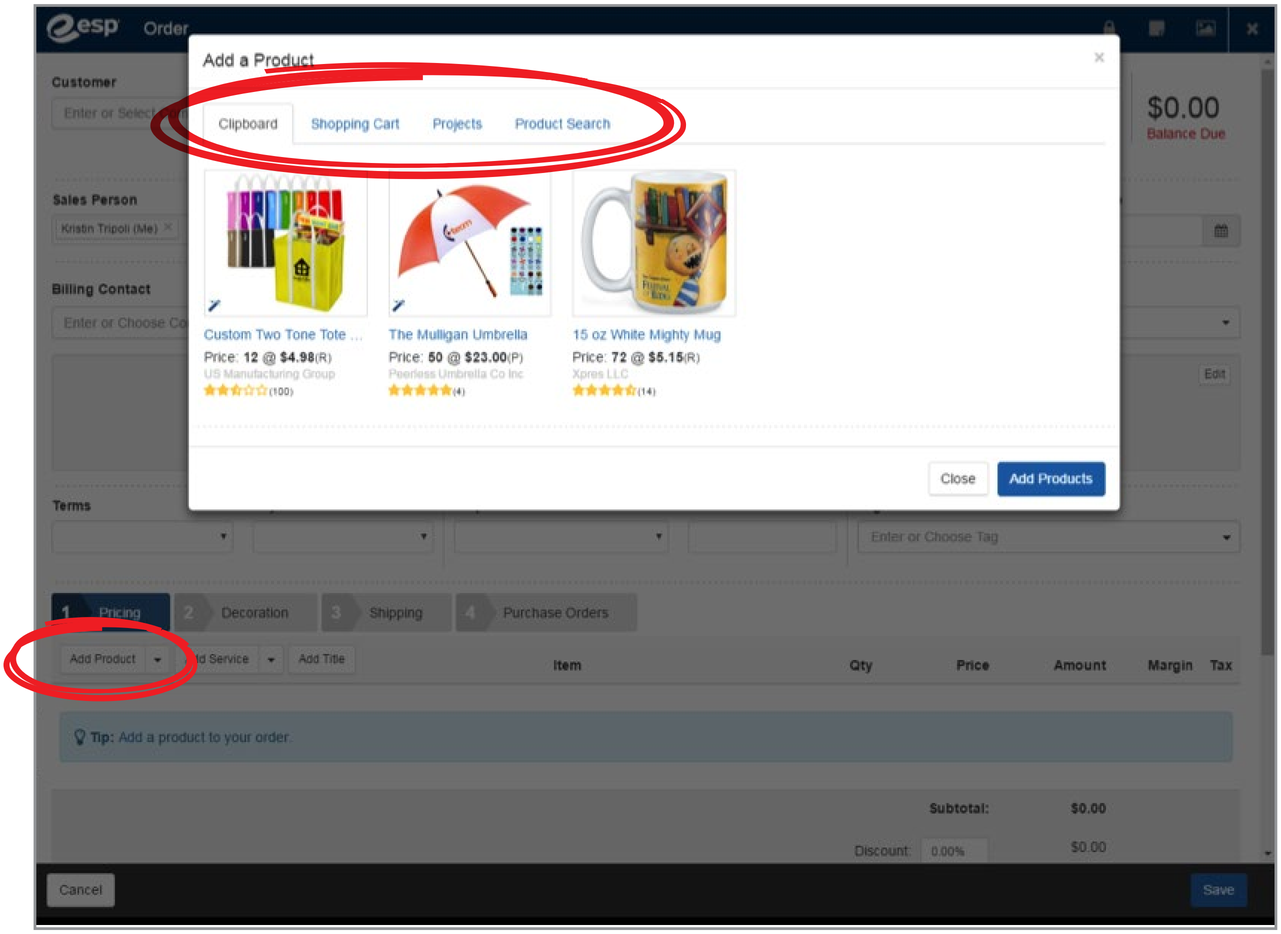
a) Pricing

- You can add a product several ways. If you will be adding a product that is not in ESP, click on the Add Product drop-down menu, and then on “New Product.” This gives you the option of adding an image and entering a Product Number, Name and Description. Below these fields you will find a drop-down menu for Supplier. Enter your Supplier or find it in the drop-down if that Supplier record is in your CRM. Across the top, you will see menu tabs for Configuration, Decoration, Instructions, Shipping and Vendor Charges. Each tab is intuitive, providing organized fields and drop-down menus to help you fill out your Order quickly and completely. You are not required to fill out every field or tab – simply pick and choose whatever works best for your needs. Several fields are linked to your CRM, so if your customer or supplier has an existing record, all related fields will auto-populate. If your customer or supplier is not in your CRM, a record will automatically be created for them once the Order is completed and saved.

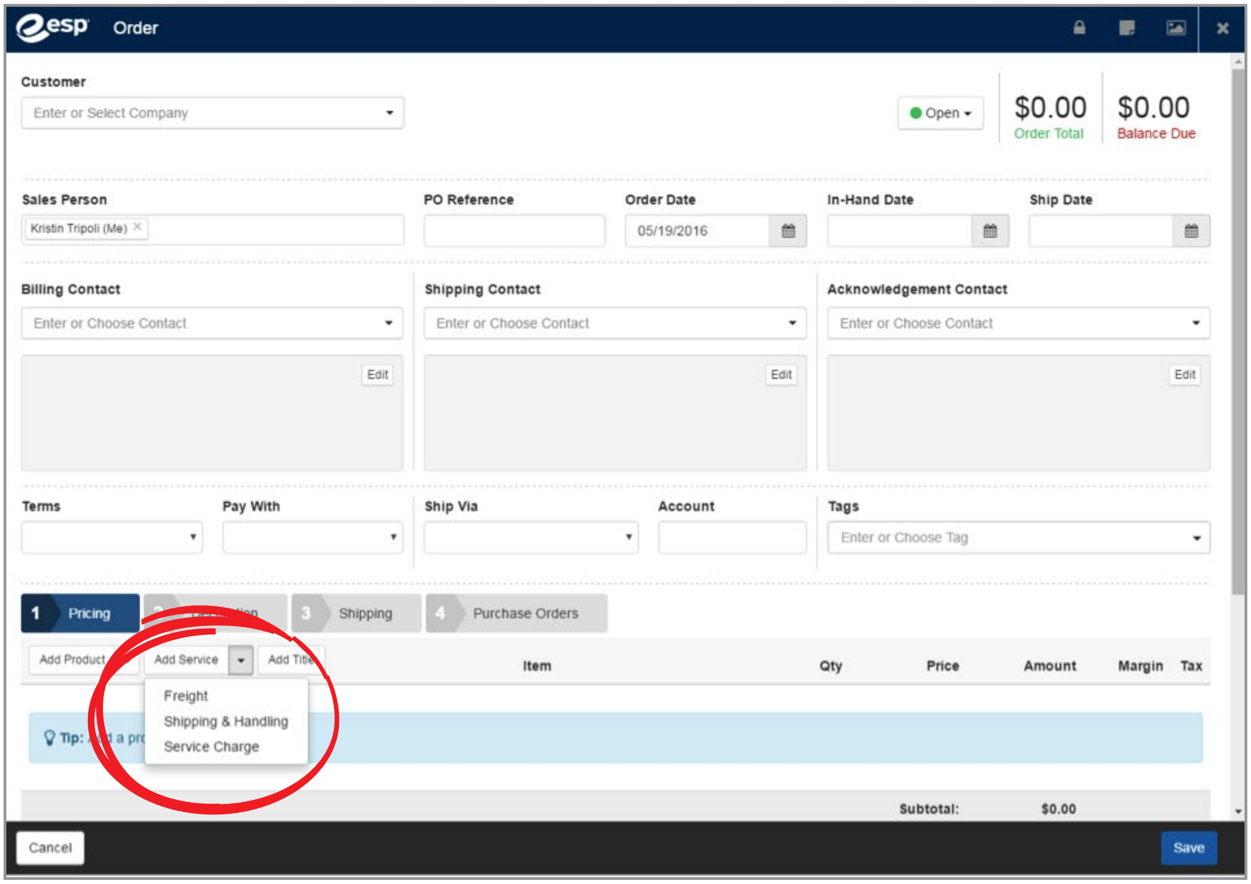




- If you will be adding a product that **is** in ESP, click on the “Add Product” button. A pop-up window will appear, giving you the option to add a product from your Clipboard, Shopping Cart, Projects or a Product Search (this instantly opens a search box right inside the Orders module).



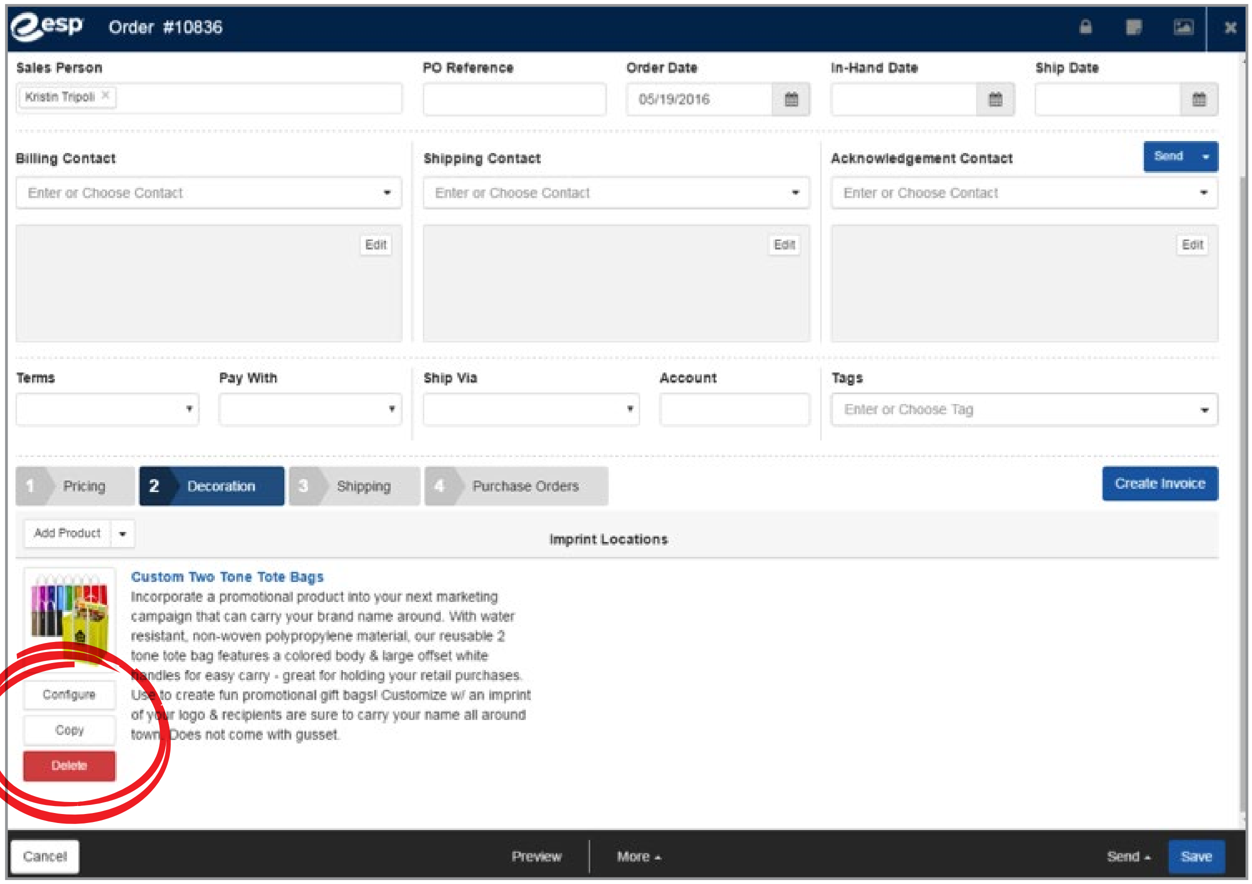
- You also have the ability to add additional fees such as Freight, Shipping & Handling and Service Charge by using the drop-down menu or by clicking on the Add Service button.

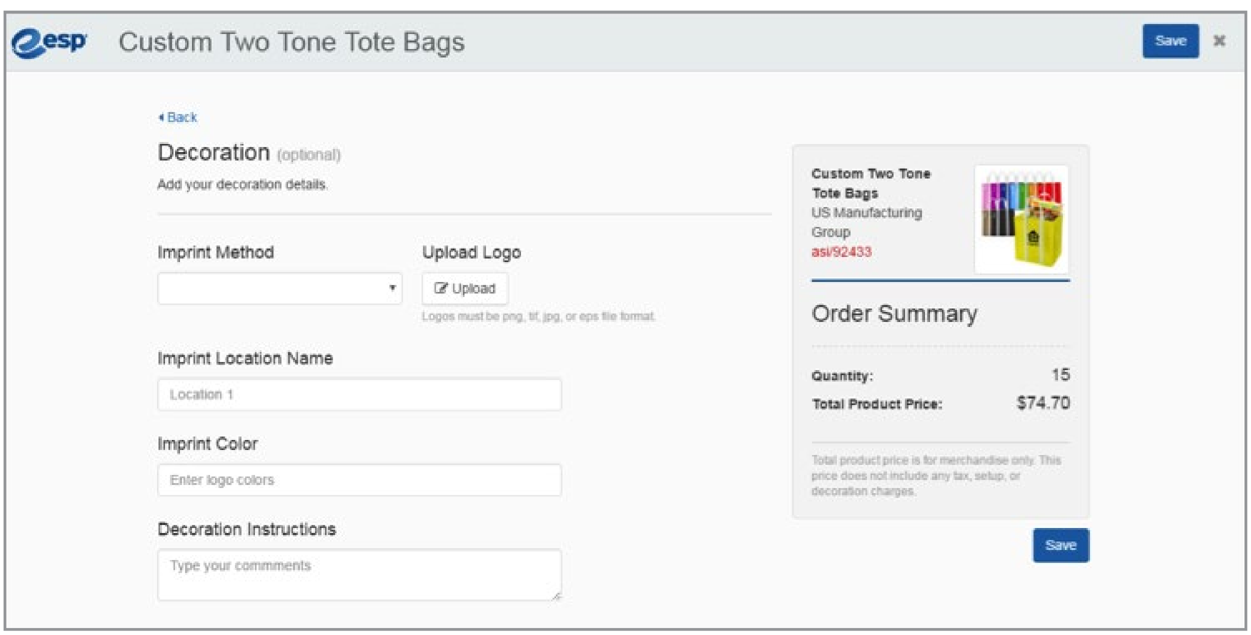


- Add a title by clicking on the Add Title button, which is directly right of the Add Service button.

b) Decoration

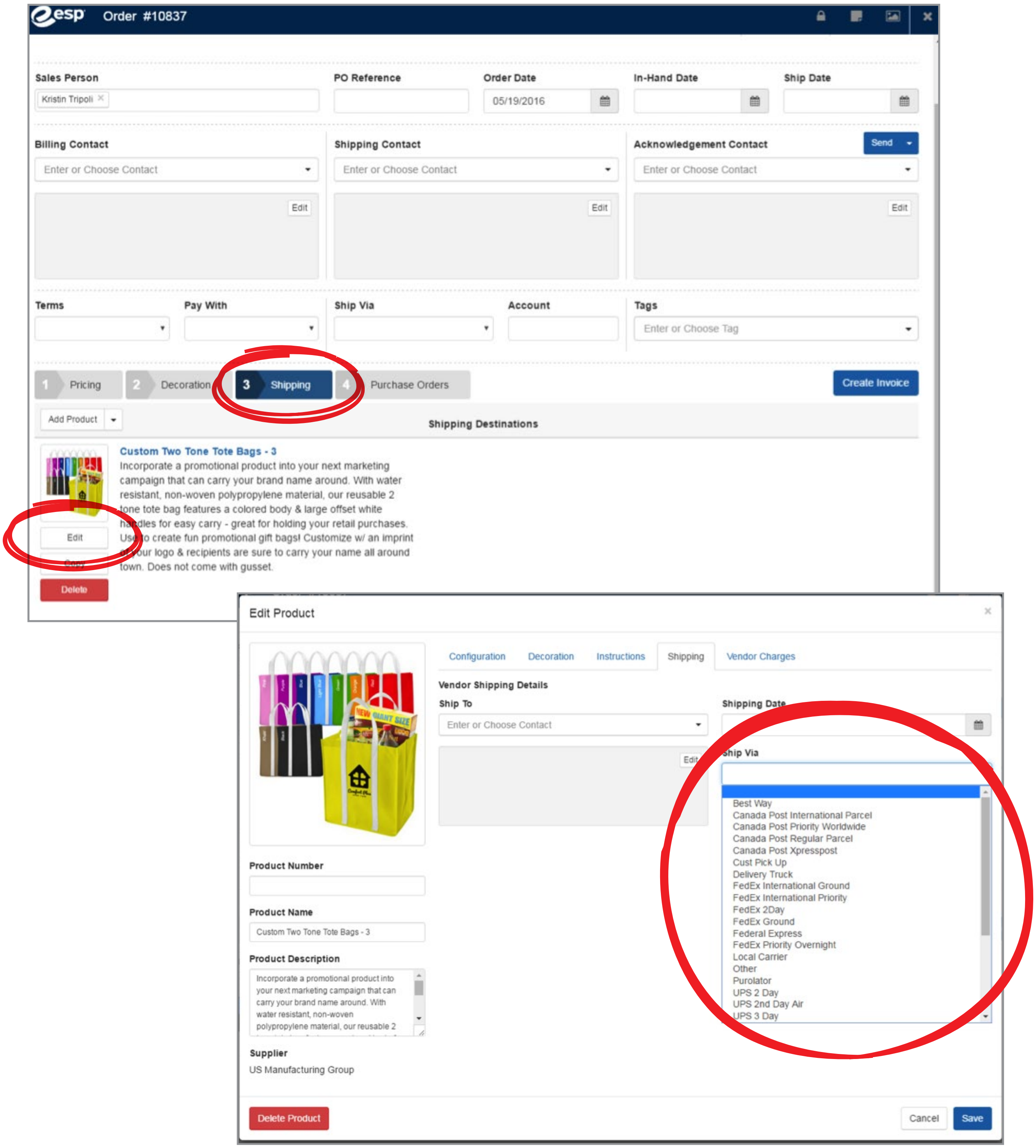
- Hover your mouse over the product image and a Configure button will appear. Click on it and follow the prompts. You will arrive at an optional Decoration page where you can choose an Imprint Method, upload a logo, indicate the imprint location and color, and provide decorator instructions





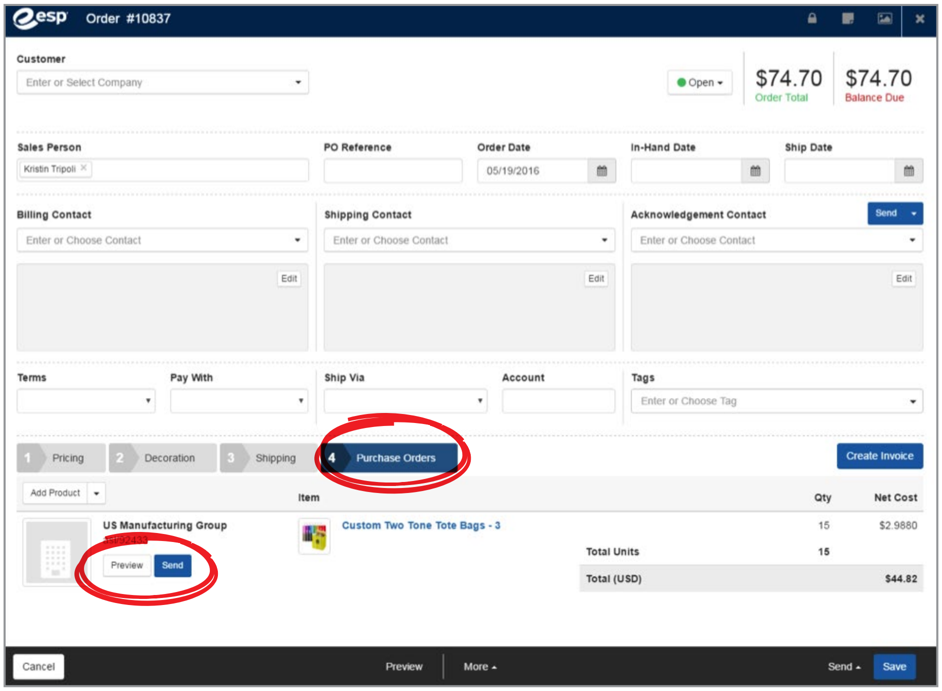
c) Shipping

- Click on the blue Shipping tab. Hover your mouse over the product image and an Edit button will appear. Click on it and a Shipping window will appear where you can enter new information or import it directly from your CRM. A drop-down menu provides a selection of multiple shipping methods. Remember to always click on the blue Save button to save your edits.



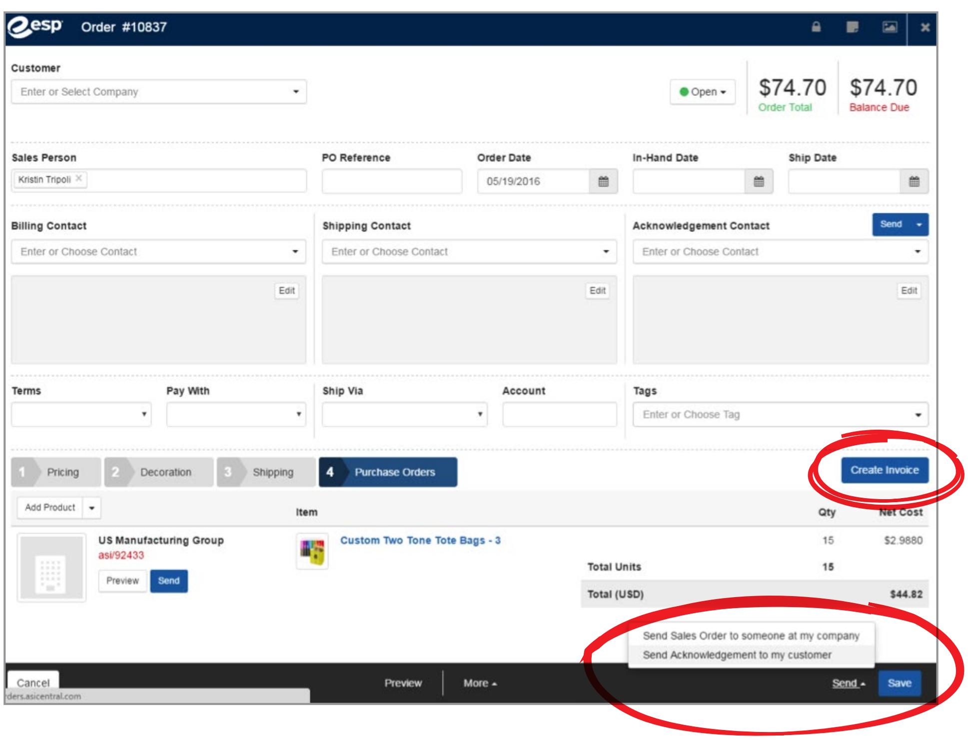
d) Purchase Orders

- To create a PO, simply click on the blue Purchase Orders button. You can Preview or Send it by clicking on the corresponding white or blue button at the bottom left of the page.



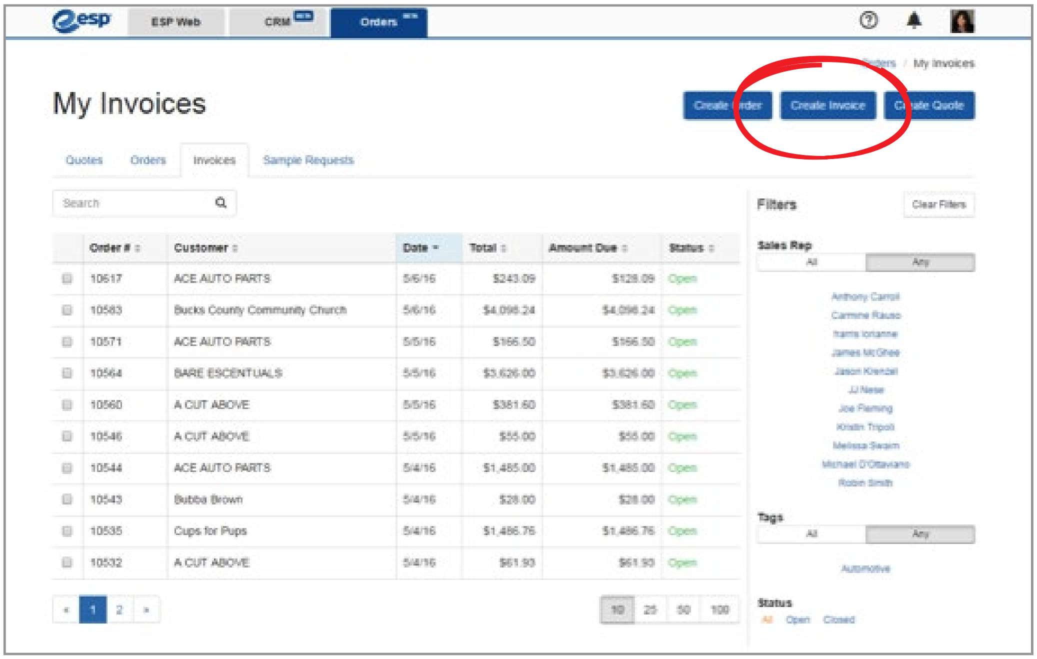
e) You have three options at this point: save the Order, send it to someone at your company or send an acknowledgement to a customer.

f) You can also create an invoice in one click by clicking on the blue Create Invoice button.

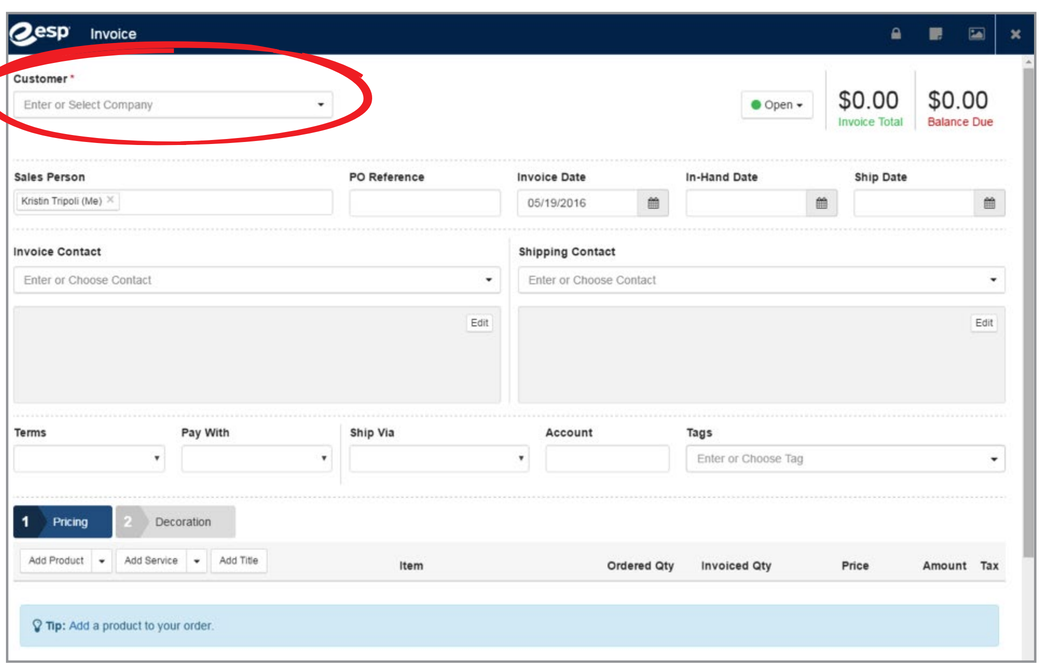


Creating New Invoices from Inside the Orders Module

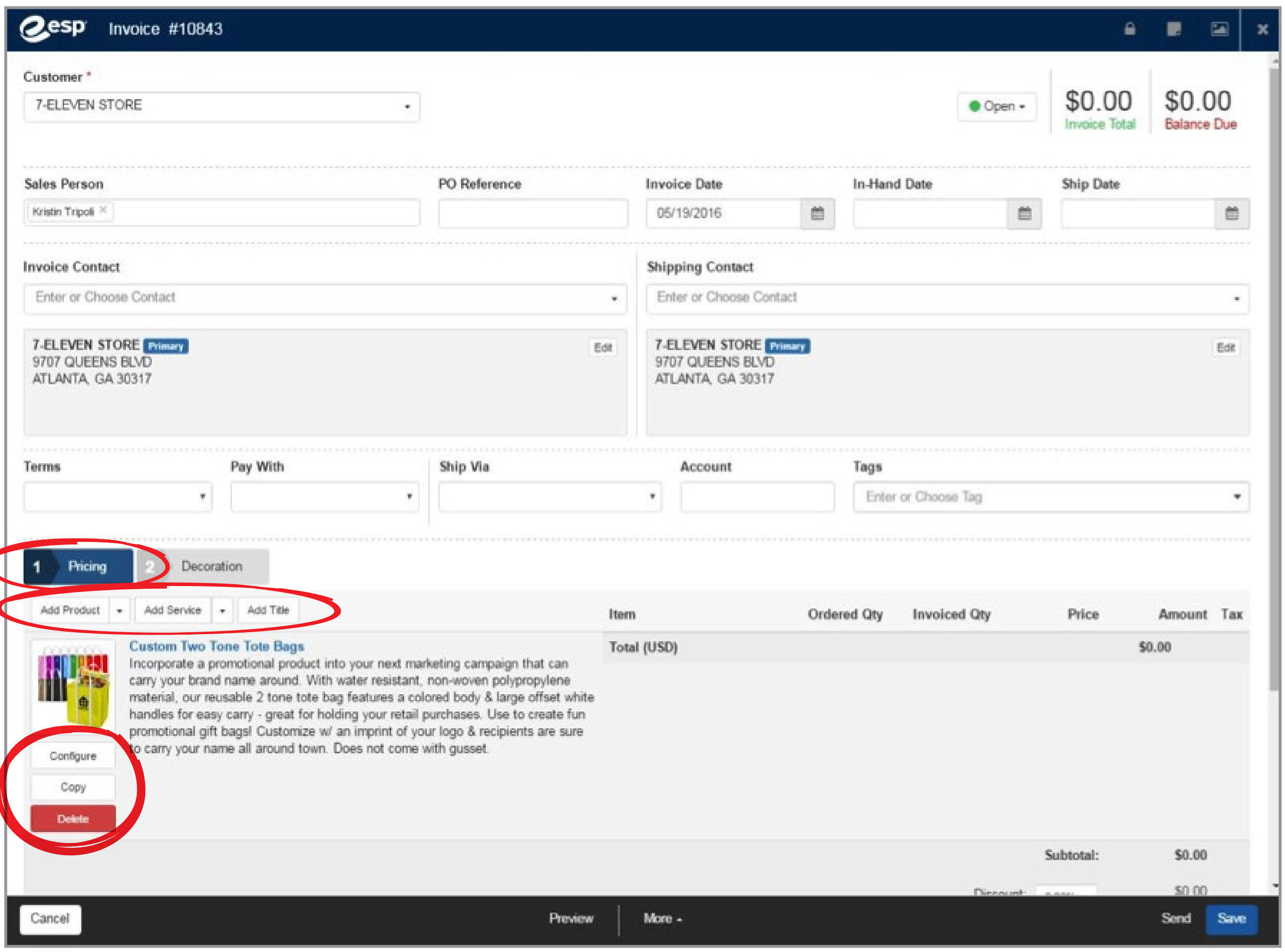
1. Click on “Create Invoice.”



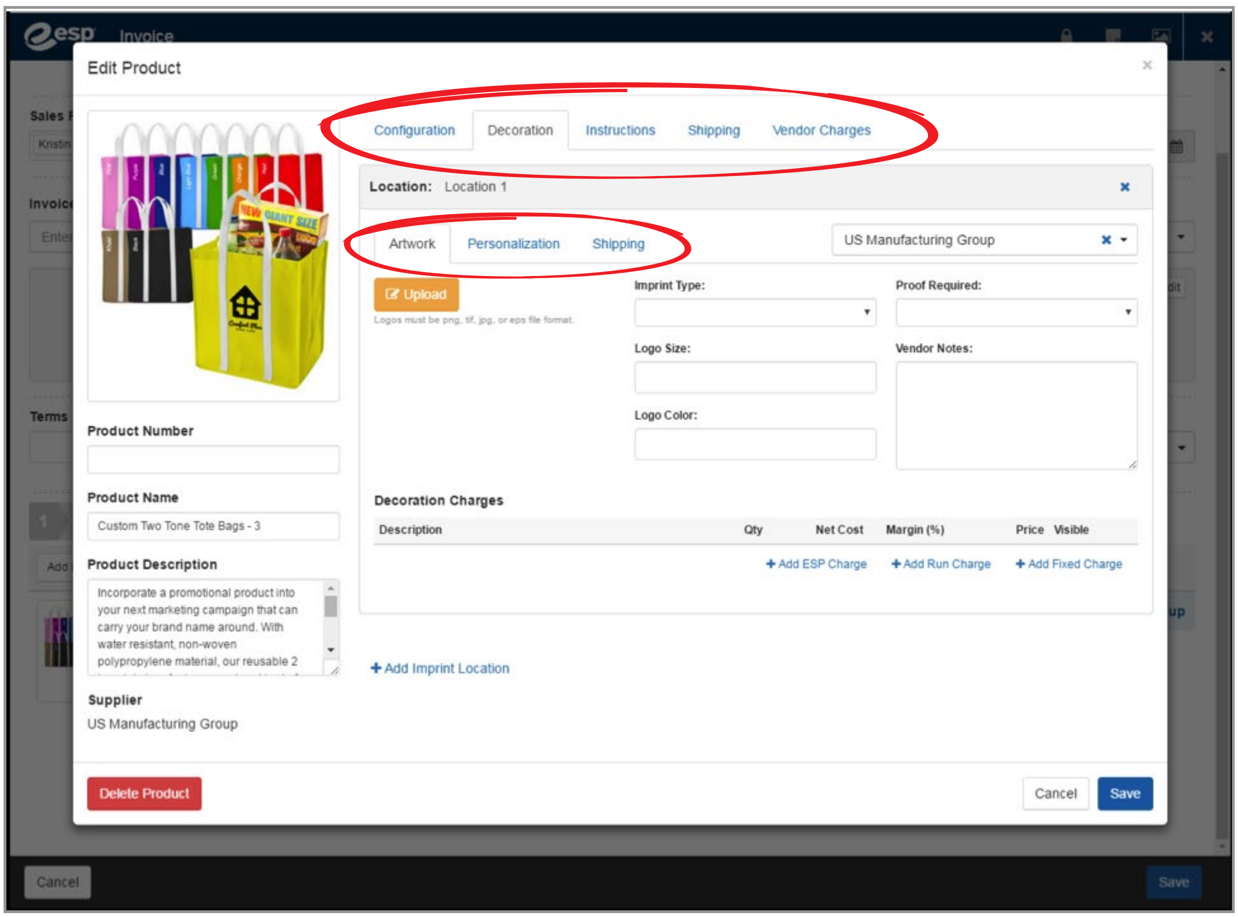
2. Your screen will show a field for Customer. Enter the contact name or select a contact from your CRM. If you are entering a new contact, you will receive a prompt asking if you would like to create a new customer record in CRM. If the contact is already in your CRM, every data point in the CRM record will automatically populate in the appropriate field in your new Invoice. Many of the remaining fields have drop-down menus for quick and easy Invoice creation.



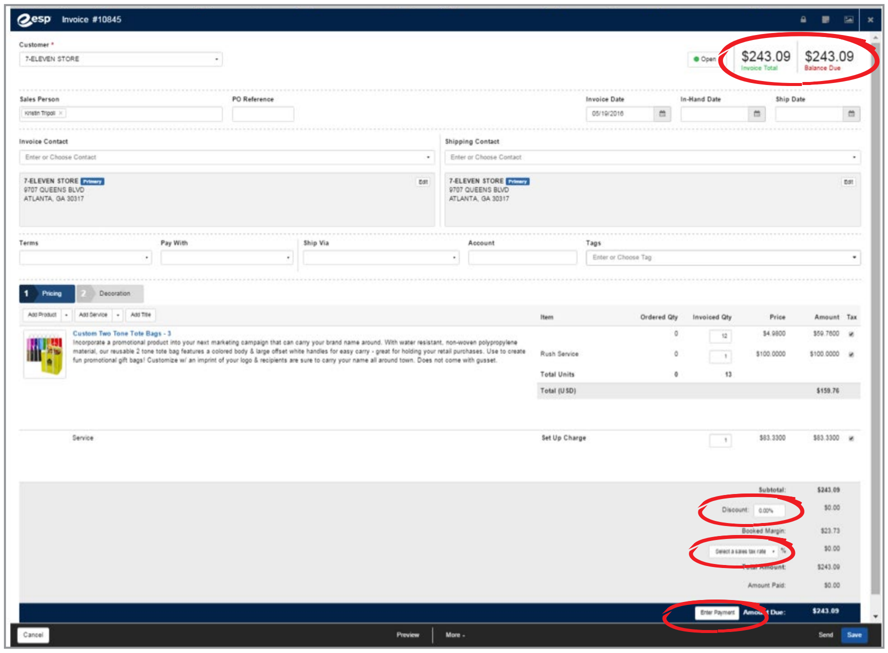
3. You will notice two steps to complete your Invoice across the bottom of the page. These are Pricing and Decoration.
    - **Pricing:** Under the blue Pricing tab, you can click on the Add Product, Add Service and Add Title buttons or use the associated drop-down menus to add charges to your invoice. Once your product has been added, hover your mouse over the product image and a Configure button will appear. Click on it and follow the prompts to populate price and quantity needed. By clicking on the blue Continue button, you will arrive at an optional Decoration page where you can choose an Imprint Method, upload a logo, indicate the imprint location and color, and provide decorator instructions. Click save, and your Invoice will display the relevant information in each associated field.



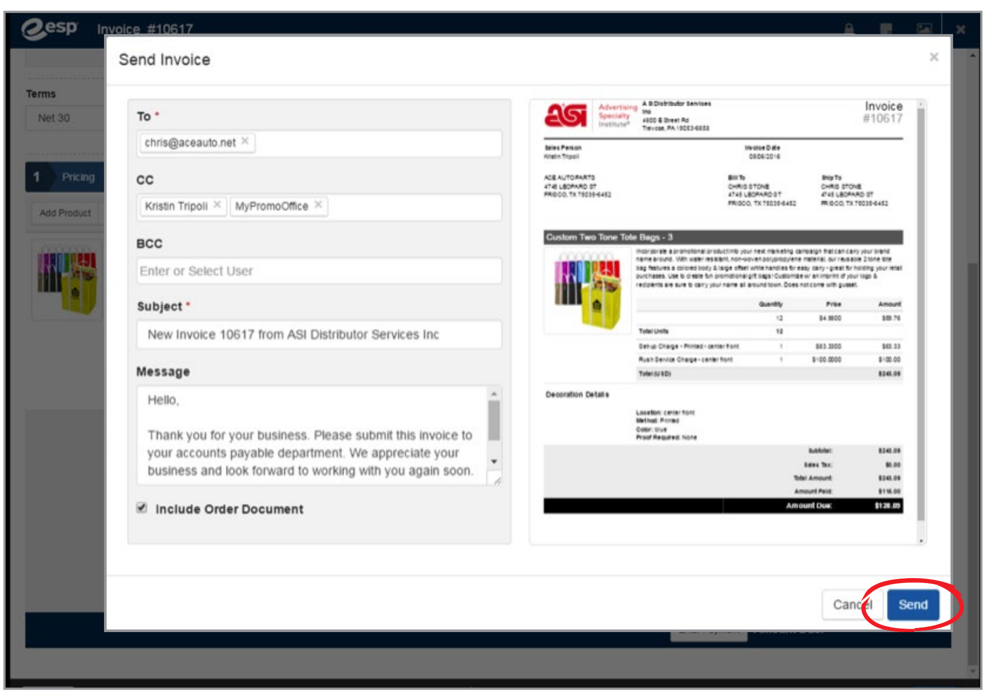
- **Decoration:** Click on the blue Decoration tab. Hover your mouse over the product image and an Edit button will appear. Click on it and an expanded Decoration window will appear, giving you additional Decoration sub-tabs for Artwork, Person-alization and Shipping. On any of these sub-tabs, you can add an additional Imprint Location, ESP Charge (pulled straight from the Product Detail in ESP), Run Charge or Fixed Charge (this drop-down allows you several label options for this additional fee). You will also see a menu at the top of the page for Configuration, Instructions, Shipping and Vendor Charges. All of these areas are optional and provide you the opportunity to be as general or as detailed in your Invoice as you wish. Remember to always click on the blue Save button to save your edits.



4. Click on the blue Pricing button again and you will find a professional-looking Invoice. In the upper right corner, you can view the Invoice Total in green and the Balance Due in red. If a deposit or partial payment was made and entered, the Balance Due will automatically adjust to reflect the payment. In the lower right corner, you will see a white Enter Payment button. Click on it to enter payments as they are received. You can also add a discount and select a sales tax rate in the fields provided, which automatically adjusts the Invoice Total.

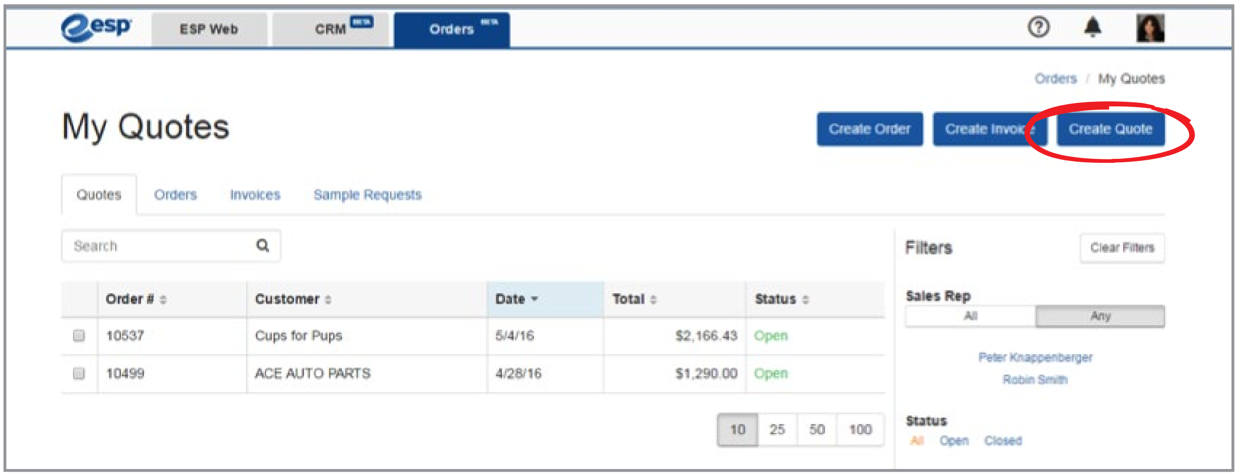


5. At this point, you can Preview, Save or Send your Invoice. The customer email address stored in your CRM will auto-populate the form, as will your preferred email address and unique CRM email address. You can use the auto-generated message or write your own before clicking the blue Send button.

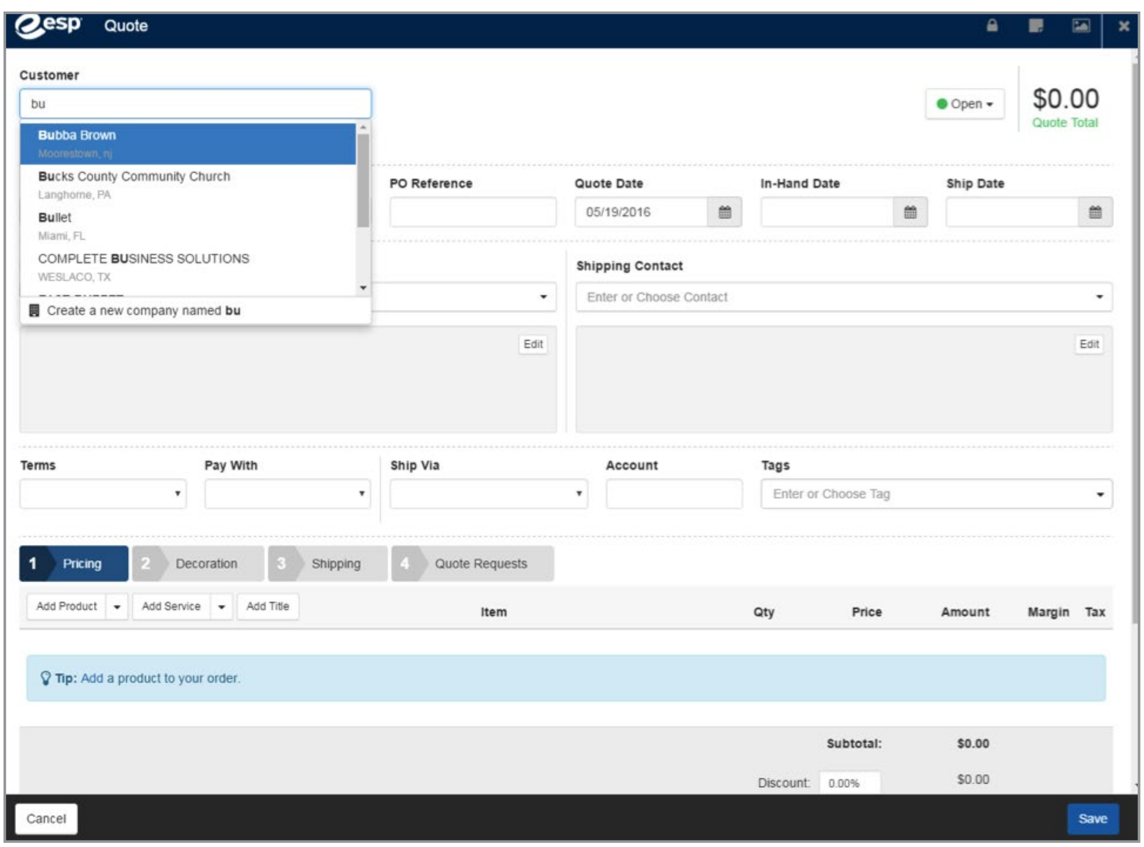


Creating New Quotes from Inside the Orders Module

1. Click on “Create Quote.”

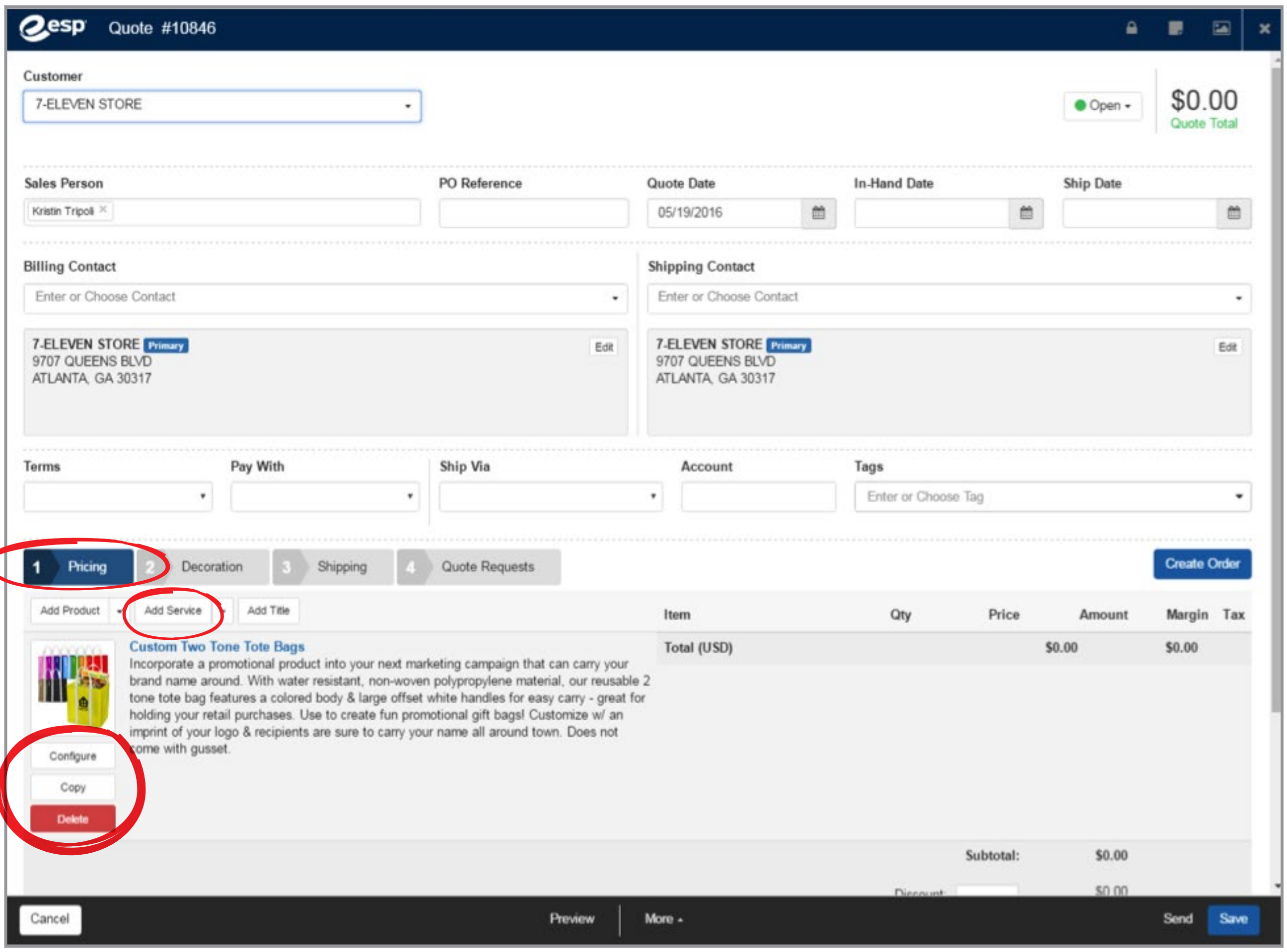


2. Your screen will show a Customer field. Enter the contact name or select a contact from your CRM. If you are entering in a new contact, you will receive a prompt asking if you would like to create a new customer record in CRM. If the contact is already in your CRM, every data point in the CRM record will automatically populate in the appropriate field in your new Quote. Many of the remaining fields have drop-down menus for quick and easy Quote creation.

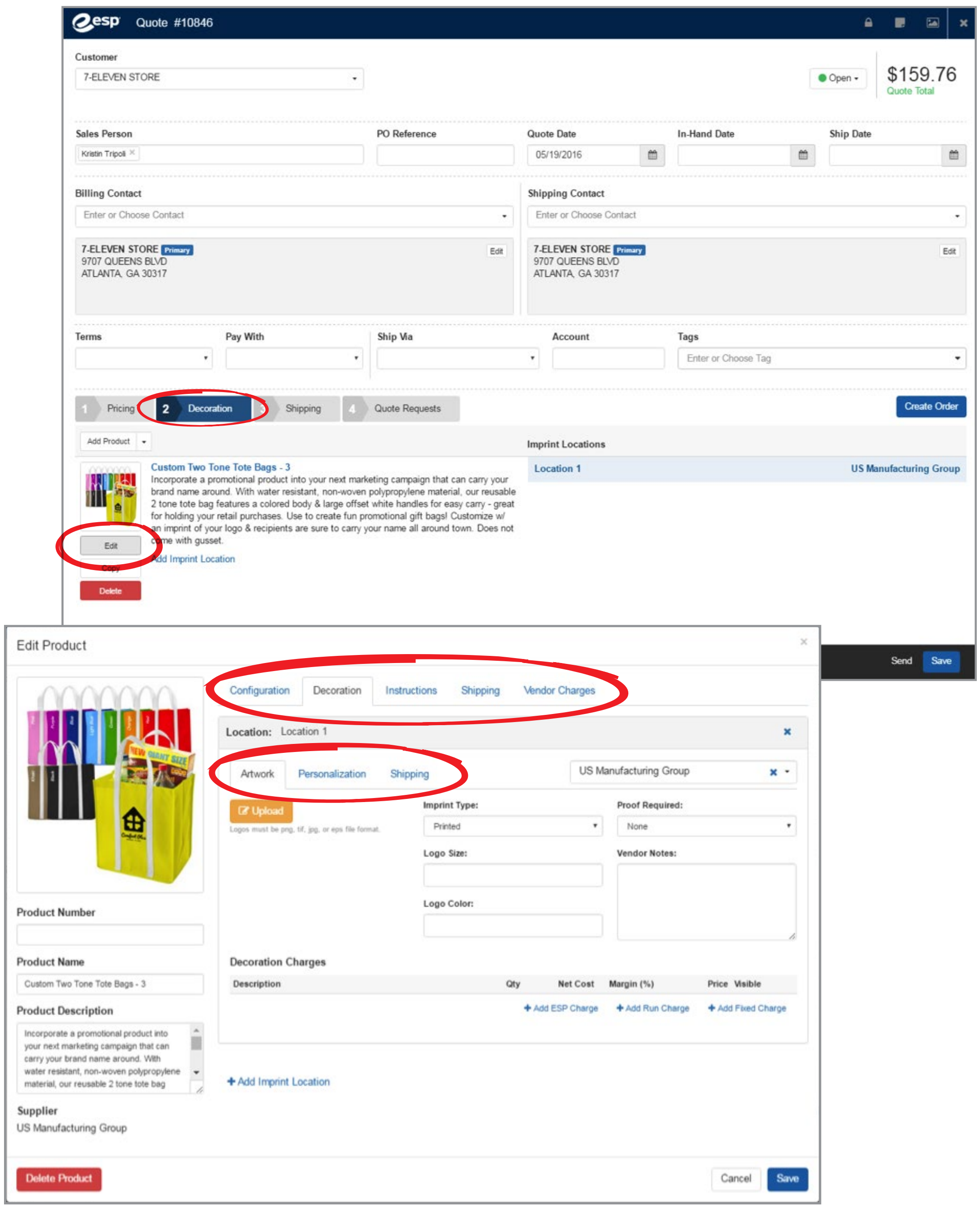


3. Across the bottom of the Quote, you will see four tabs: Pricing, Decoration, Shipping and Quote Requests

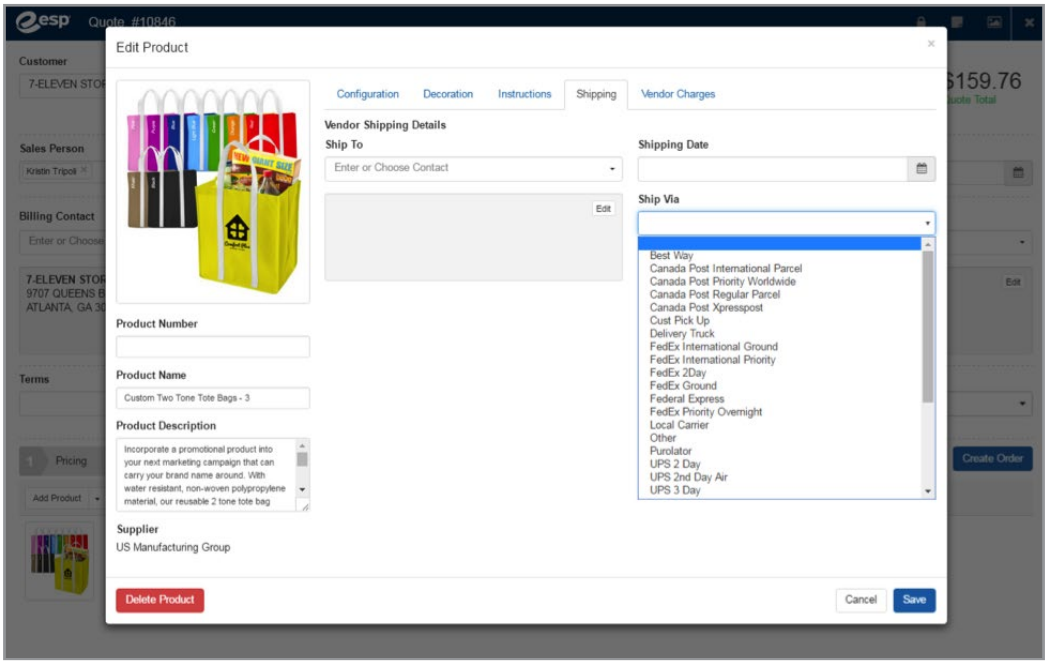
    - **Pricing:** Under the blue Pricing tab, you can click on the Add Product, Add Service and Add Title buttons, or use the associated drop-down menus to add charges to your invoice. Once your product has been added, hover your mouse over the product image and a Configure button will appear. Click on it and follow the prompts to populate price and quantity needed. By clicking on the blue Continue button, you will arrive at an optional Decoration page where you can choose an Imprint Method, upload a logo, indicate the imprint location and color, and provide decorator instructions. Click save and your Quote will display the relevant information in each associated field.



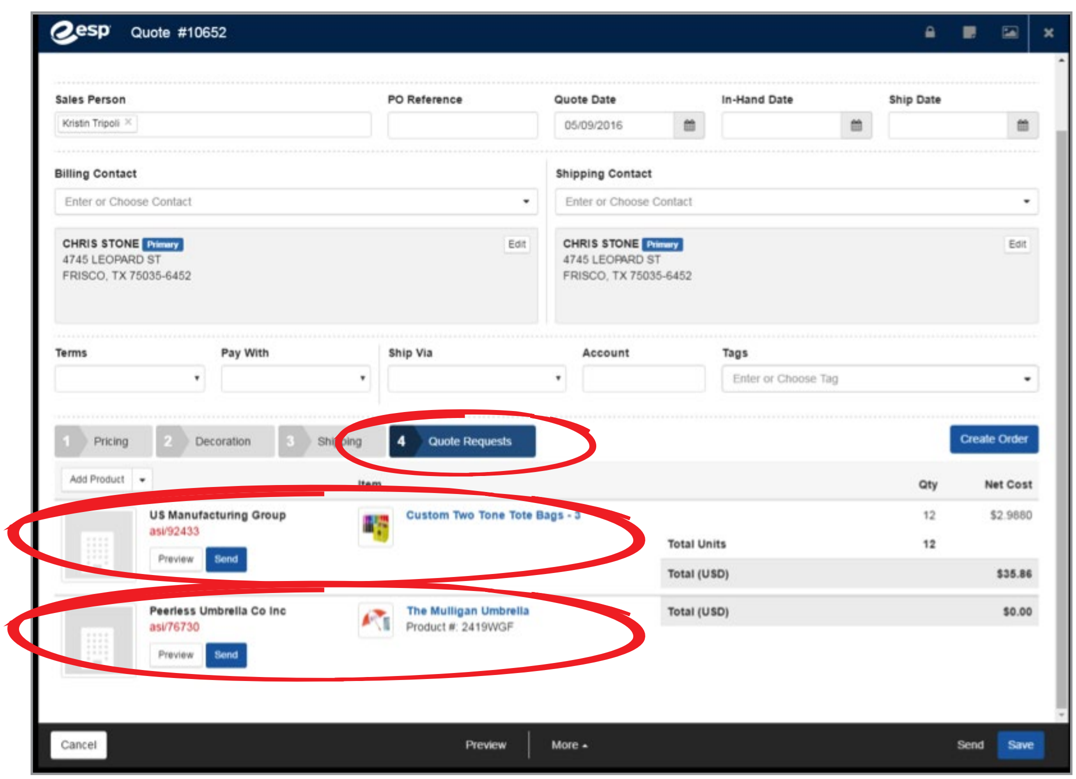
- **Decoration:** Click on the blue Decoration tab. Hover your mouse over the product image and an Edit button will appear. Click on it and an expanded Decoration window will appear, giving you additional Decoration sub-tabs for Artwork, Personalization and Shipping. On any of these sub-tabs, you can add an additional Imprint Location, ESP Charge (pulled straight from the Product Detail in ESP), Run Charge or Fixed Charge (this drop-down allows you several label options for this additional fee). You will also see a menu at the top of the page for Configuration, Instructions, Shipping and Vendor Charges. All of these areas are optional and provide you the opportunity to be as general or as detailed in your Quote as you wish. Remember to always click on the blue Save button to save your edits.



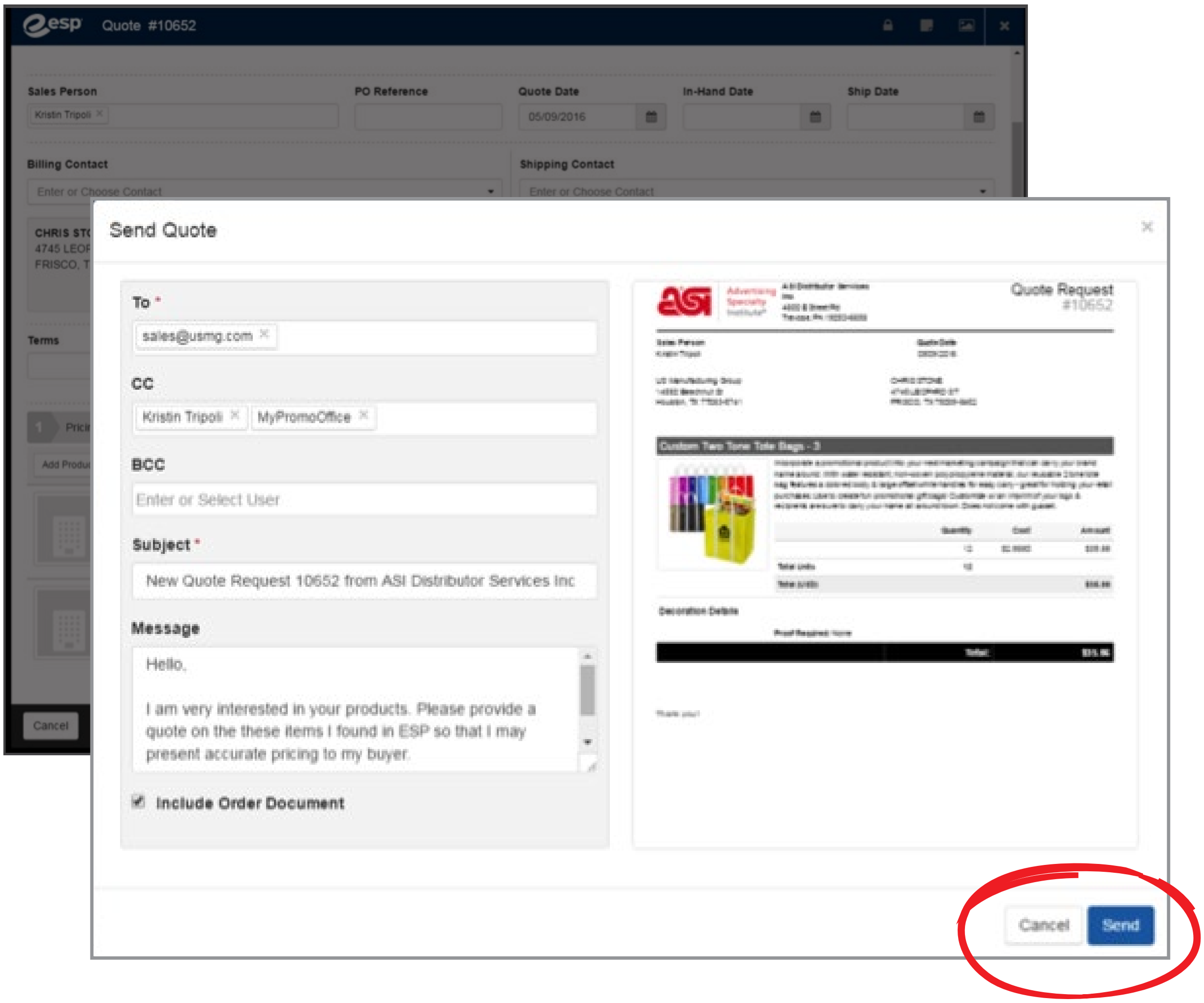
- **Shipping:** Click on the blue Shipping tab. Hover your mouse over the product image and an Edit button will appear. Click on it and a Shipping window will appear where you can enter new information or import it directly from your CRM. A drop-down menu provides multiple shipping methods from which to select. Remember to always click on the blue Save button to save your edits.



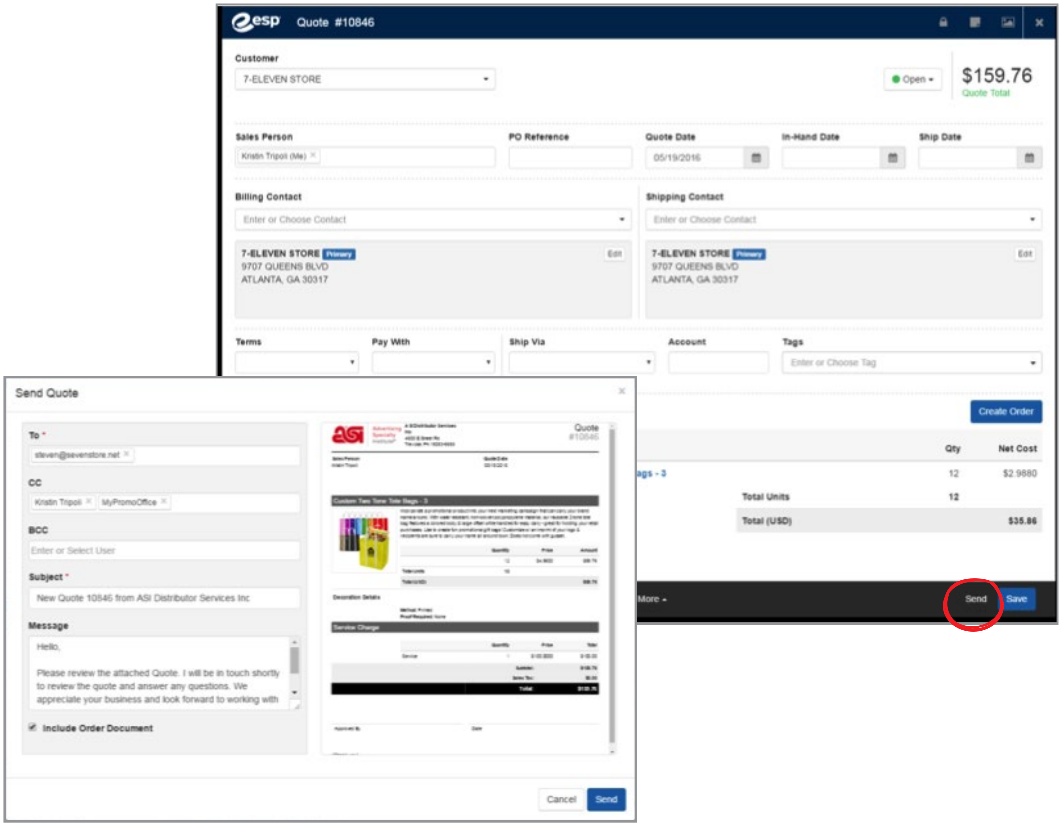
- **Quote Requests:** While Quotes are sent to clients, Quote Requests are sent to Suppliers. Click on the blue Quote Requests tab. The ESP Supplier for each product on your Quote will appear next to the item they provide.



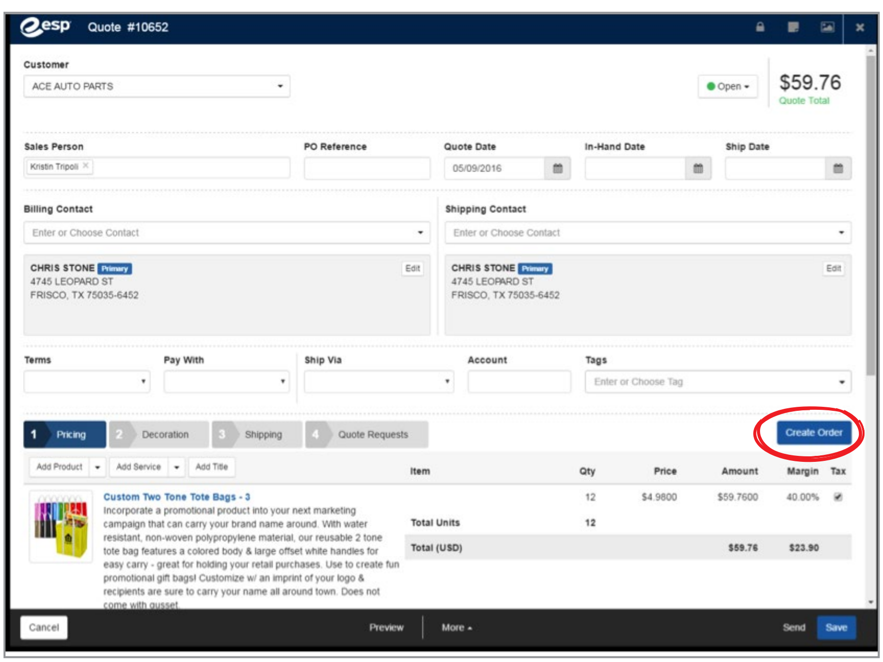
You can Preview or Send Quote Requests using the buttons displayed underneath each Supplier. If you select the blue Send button, a new window will display the request and email message that will be sent to the Supplier. Click Cancel or Send to finish.



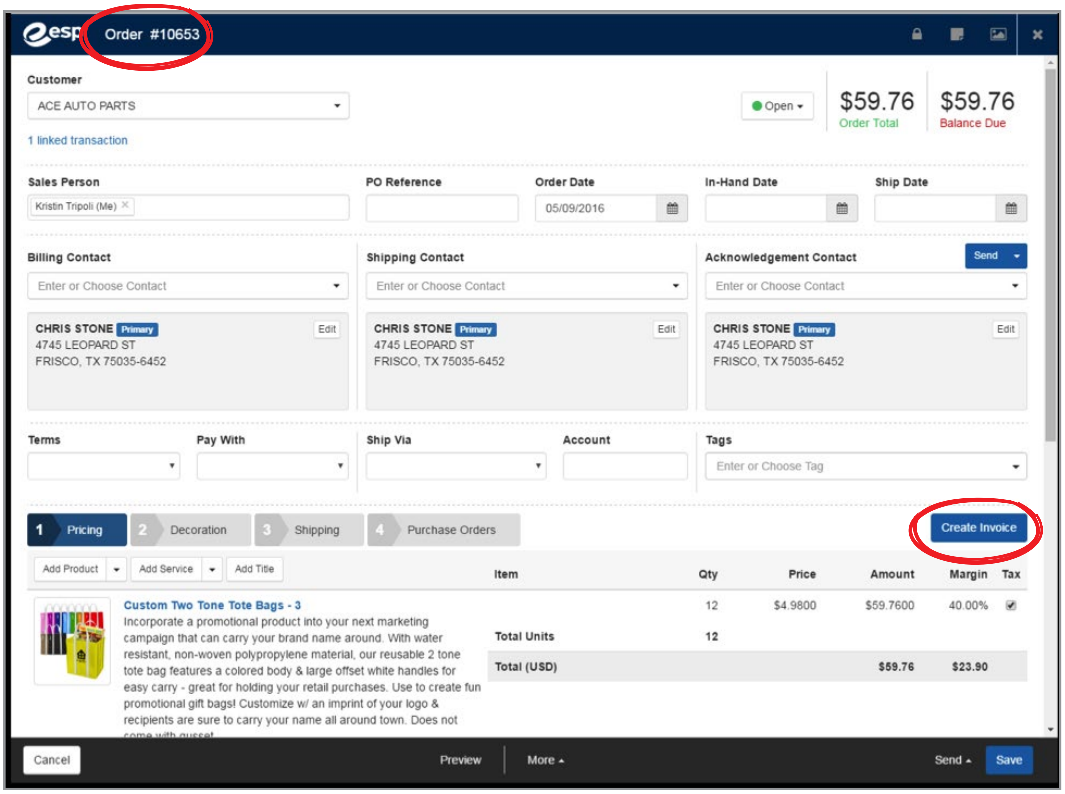
4. Once your Quote is ready to be sent to your client, click on the Send link in the lower right corner of your screen. A new window will display the Quote and email message that will be sent to your client. Click Cancel or Send to finish.



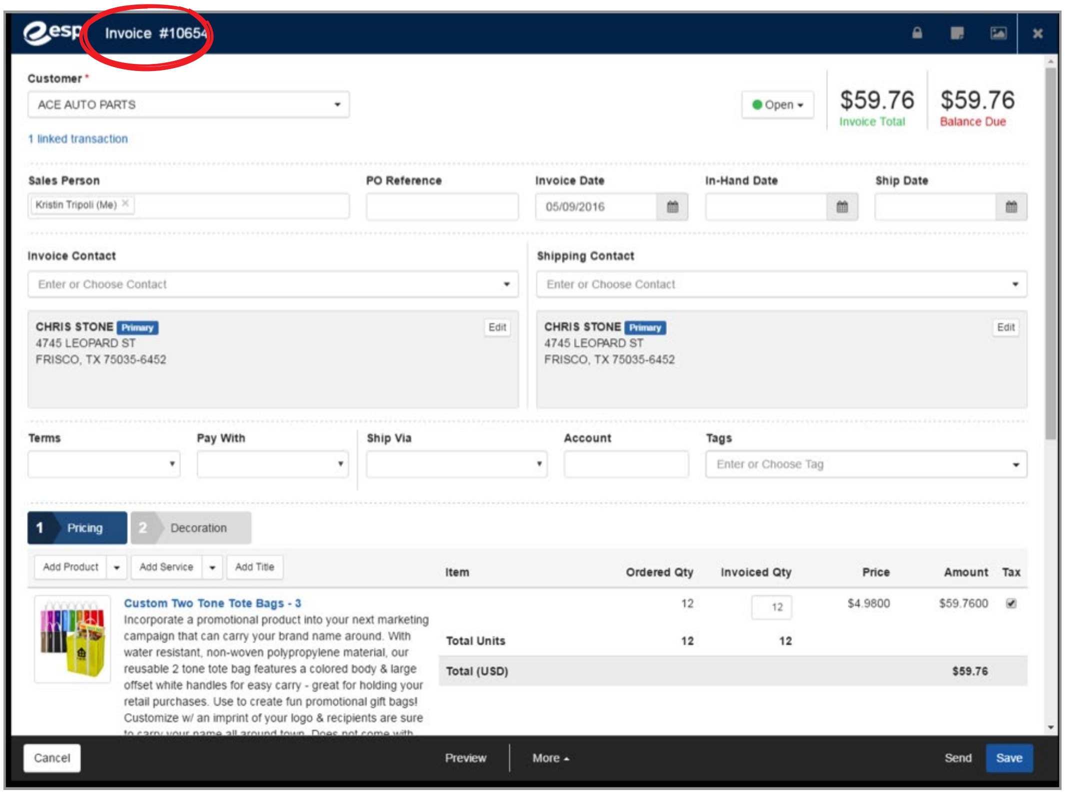
5. Please note that from the original Quote page, you can create an Order in one click simply by clicking on the blue Create Order button at the right of the page.



With one click on the Create Order button, the Quote above becomes the Order below.

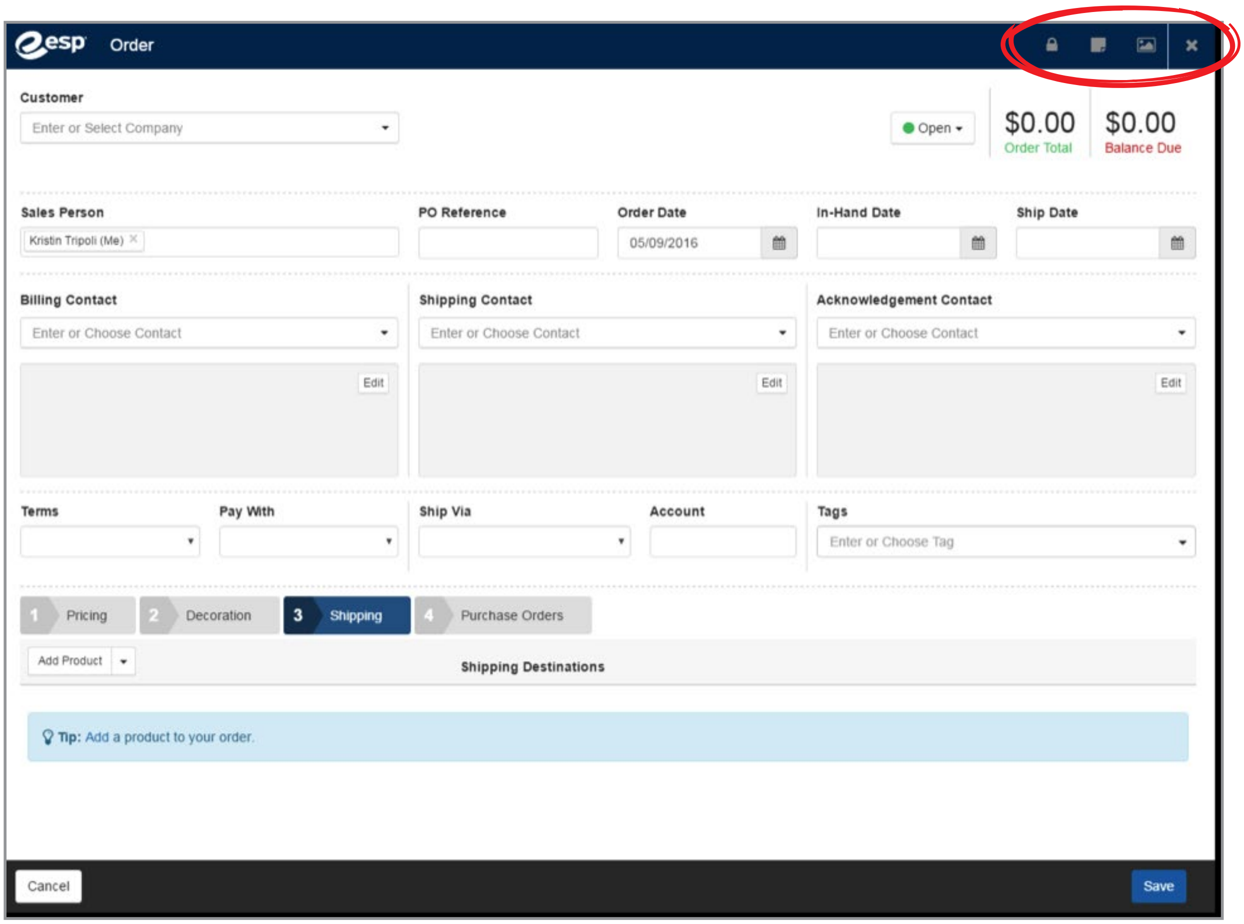


With one click on the Create Invoice button, the Order above becomes the Invoice below:



Visibility, Notes and Artwork

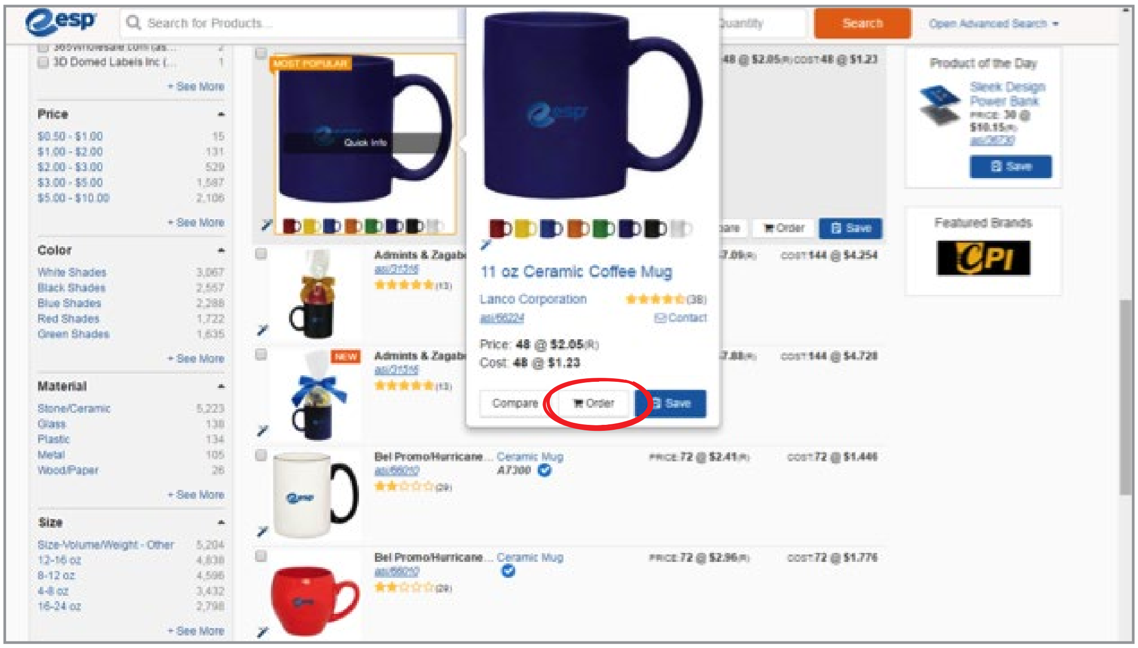
Whether you are in an Order, Invoice or Quote, there are four icons across the top blue bar of the page. The lock icon represents Visibility, the page icon represents Notes, the image icon represents Artwork and the X icon allows you to close the page.



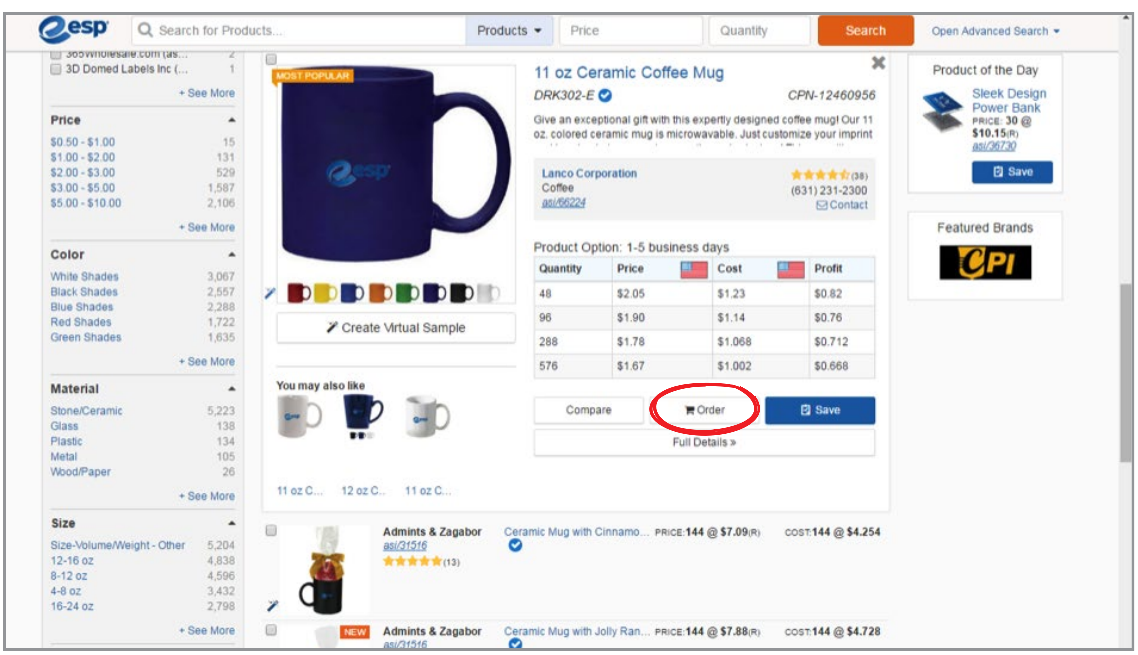
- **Visibility:** Click on the Visibility icon and a side window opens, allowing you to select who can see each form. Click the icon again to close the side window.
- **Notes:** Clicking on the Notes icon will open a side window and bring up any Notes associated with the form, and also give you an opportunity to add new Notes. Click the icon again to close the side window.
- **Artwork:** Clicking on this icon opens a side window that allows you to upload associated Art Files. Click the icon again to close the side window.
- **Close:** Clicking on this icon closes the page.

The fastest way to create orders and quotes is right from within your ESP search results!

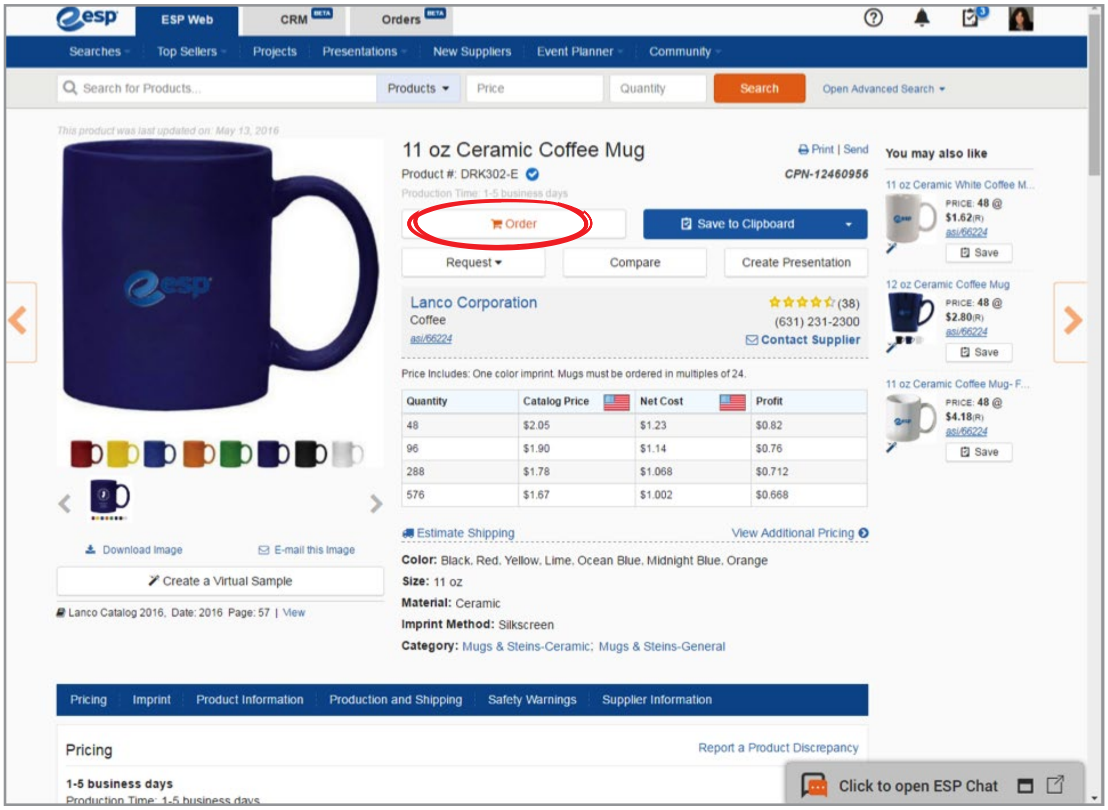
1. Run a product search.
2. There are many ways to easily create an **Order** right from your ESP search results.
   - Place your mouse over the product you're interested in and an Order button with shopping cart icon will appear. Click Order to start a new order.



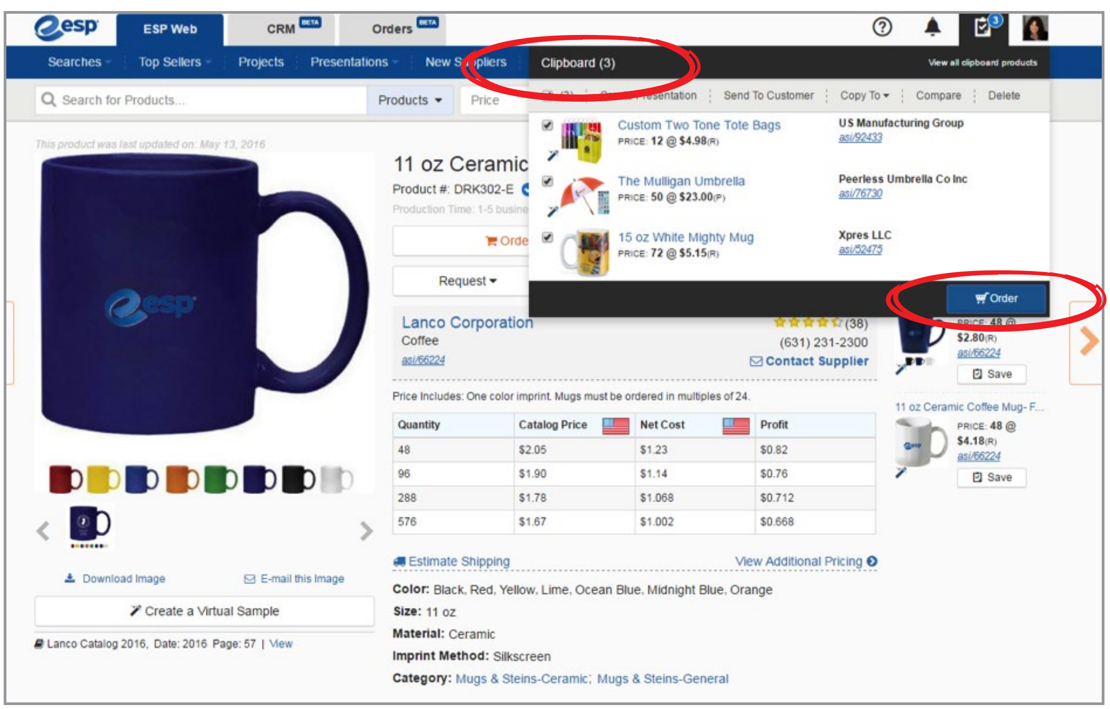
   - Click anywhere in the product search result box and a quick view window will appear with the same Order button as above. Click Order to start a new order.



- Click through to the full product detail page and click Order to start a new order.

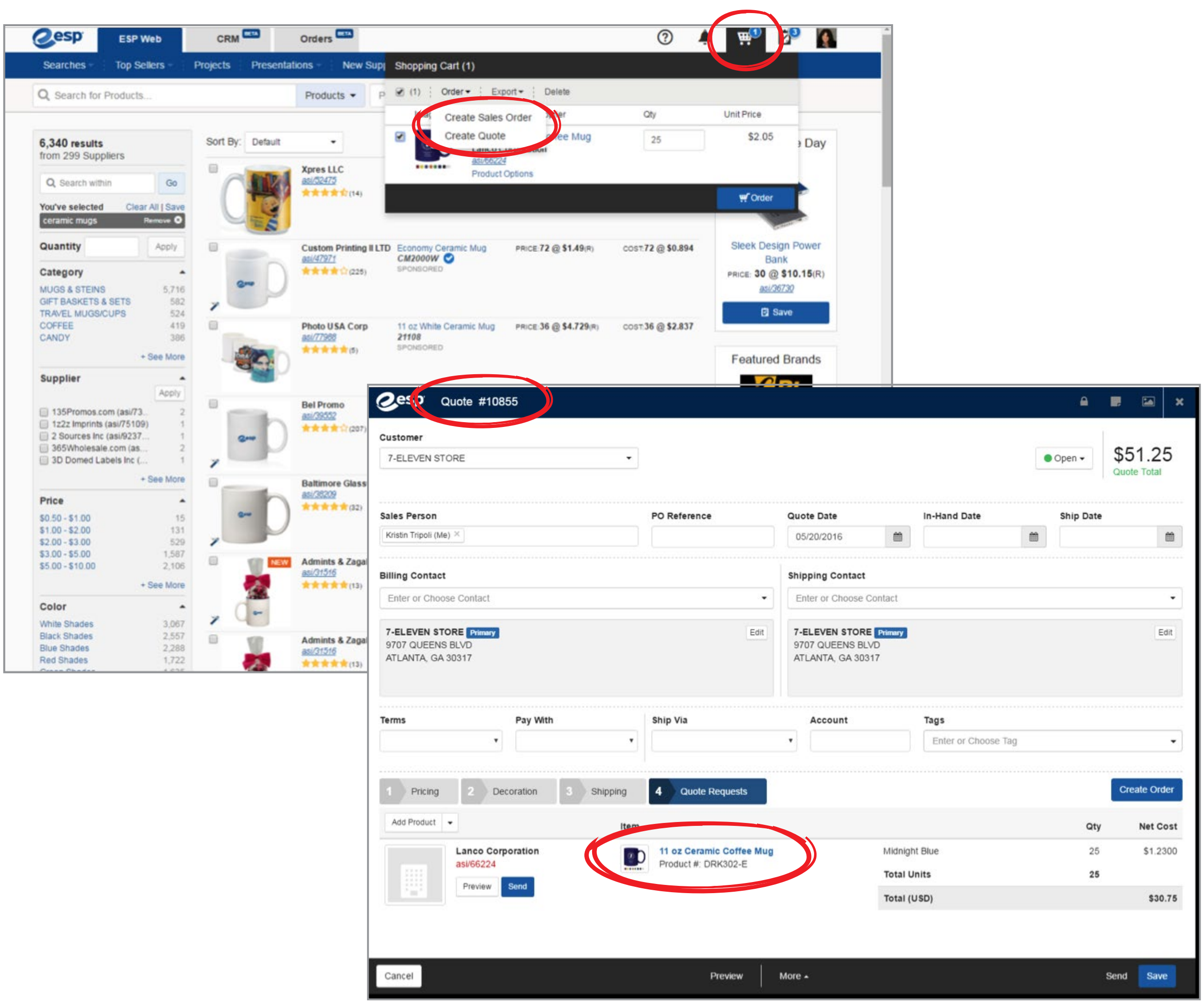


- Create an Order straight from your Clipboard.

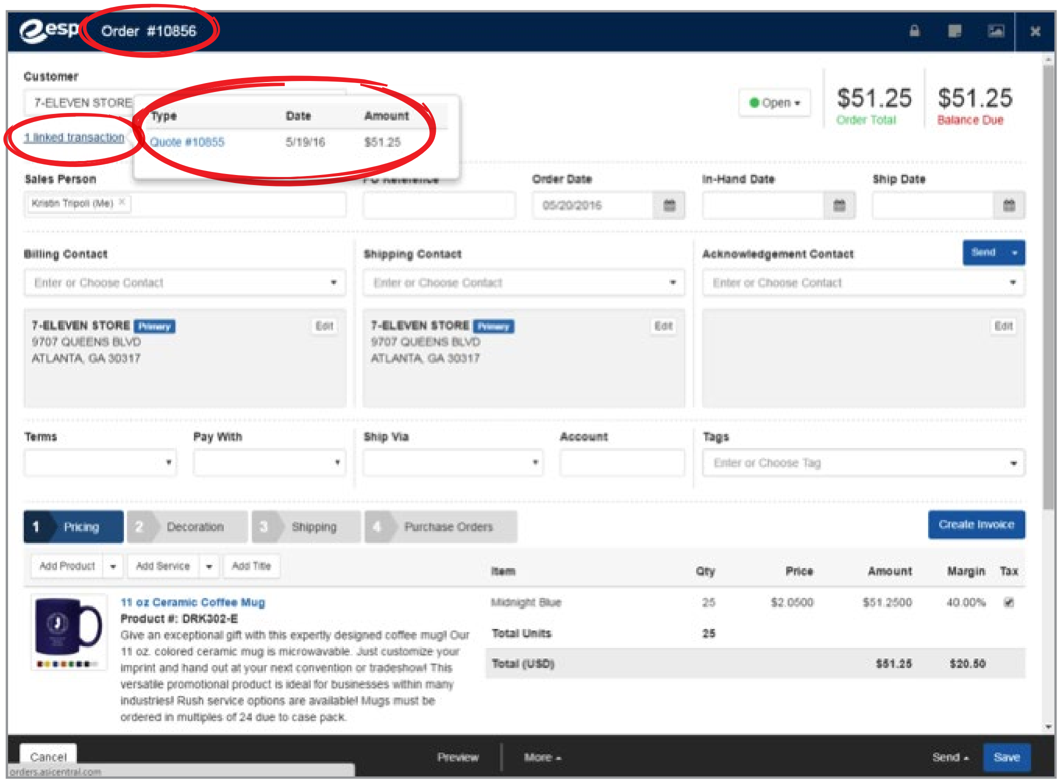


3. ESP walks you step by step through the Order creation process.
   - Click on the Order button
   - Enter the quantity and click on Continue
   - Enter the decoration information (optional) and click Continue
   - Choose your customer from the drop-down menu if they are in your CRM; if not, enter the client name and ESP will ask you if you'd like to create a new record in your CRM.
   - Click Create Order, and the Order is automatically created.
   - Remember: From your Order, you can create an Invoice in one click and send a PO in one click.

4. To create a **Quote** right from your ESP search results, save your desired products to the Shopping Cart.
   - Check the products you want in your Quote.
   - Click on the Order drop-down menu and select Create Quote. The quote is automatically created.
   - Remember: From your Quote, you can create an Order in one click, and an Invoice in one click from your Order.



5. Quotes, Orders and Invoices that were created from each other will be marked with a blue link at the top left corner of the screen for easy access to all related documents.



Thank You!

We hope that ESP CRM & Orders helps you streamline the way you do business and makes your life a little bit easier. If you have any questions, concerns or suggestions, please don't hesitate to contact product support at **(800) 546-1350 ext.2** or support@asicentral.com.