



# Method CRM

---

## User Guide

# Contents

Sales Center .....	10
Open the Sales Center .....	10
Sales Center Dashboard .....	10
Getting the Most Out of the Sales Center Dashboard .....	10
My Calendar Section.....	10
Getting to the My Calendar Section of the Dashboard .....	11
Change the View of the Calendar on the Dashboard .....	11
Hide the My Calendar Section of the Dashboard .....	12
My Campaigns.....	12
Getting to the My Campaigns Section of the Dashboard .....	12
Go to a Campaign on the Dashboard .....	12
Search Campaigns on the Dashboard .....	12
Sort Campaigns on the Dashboard .....	13
Edit Campaigns on the Dashboard.....	13
Change the Layout of the Campaigns Section on the Dashboard .....	13
Create a New Campaign from the Dashboard .....	13
My Opportunity Pipeline.....	14
Getting to the My Opportunity Pipeline Section of the Dashboard .....	14
Go to an Opportunity.....	14
Search Opportunities on the Dashboard .....	14
Sort Opportunities on the Dashboard.....	14
Edit an Opportunity on the Dashboard .....	15
Change the layout of the Opportunities Section on the Dashboard .....	15
Create a New Opportunity from the Dashboard.....	15
My Activities Section .....	15
Getting to the My Activities Section of the Dashboard .....	16
Go to an Activity.....	16
Search Activities on the Dashboard .....	16
Sort Activities on the Dashboard .....	16
Edit an Activity on the Dashboard .....	16
Change the layout of the Activities Section on the Dashboard.....	16
Add a New Activity from the Dashboard .....	17
Campaigns.....	17
What is a Campaign?.....	17
Campaign Types .....	17
Getting to the Campaigns Tab Link.....	18

The Existing Campaigns Section .....	18
Go to a Campaign .....	18
Search Campaigns .....	18
Sort Campaigns .....	19
Change the Layout of the Existing Campaigns Section .....	19
Hide the Existing Campaigns Section .....	19
Add a New Campaign .....	19
Add a Campaign Status .....	20
Edit a Campaign Status .....	20
Delete a Campaign Status.....	20
Add a Campaign Type.....	20
Edit a Campaign Type.....	21
Delete a Campaign Type .....	21
Edit a Campaign .....	21
Planning & Analysis of a Campaign.....	21
Opportunities for this Campaign.....	22
Go to an Opportunity Related to a Campaign.....	22
Search Opportunities Related to a Campaign .....	22
Edit an Opportunity Related to a Campaign .....	22
Sort Opportunities for this Campaign.....	22
Change the layout of Opportunities for this Campaign Section .....	23
Activities for this Campaign .....	23
Go to an Activity Related to a Campaign .....	23
Search Activities Related to a Campaign .....	23
Edit an Activity Related to a Campaign .....	24
Sort Activities for this Campaign .....	24
Change the layout of Activities for this Campaign Section .....	24
Opportunities .....	25
What is an Opportunity? .....	25
Opportunity Types .....	25
Getting to the Opportunities Tab Link .....	25
The Existing Opportunities Section .....	25
Go to an Opportunity.....	25
Search Opportunities.....	25
Sort Opportunities .....	26
Change the Layout of the Existing Opportunities Section.....	26
Hide the Existing Opportunities Section .....	26
Add a New Opportunity.....	26

Add an Opportunity Stage.....	27
Edit an Opportunity Stage.....	27
Delete an Opportunity Stage .....	27
Add an Opportunity Type .....	28
Edit an Opportunity Type .....	28
Delete an Opportunity Type .....	28
Add an Opportunity Lead Source.....	28
Edit an Opportunity Lead Source.....	28
Delete an Opportunity Lead Source .....	29
Edit an Opportunity .....	29
Activities for this Opportunity .....	29
Go to an Activity Related to an Opportunity.....	29
Search Activities Related to an Opportunity.....	29
Edit an Activity Related to an Opportunity .....	30
Sort Activities for this Opportunity .....	30
Change the layout of Activities for this Opportunity Section.....	30
Activities .....	31
What is an Activity? .....	31
Activity Types.....	31
Getting to the Activities Tab Link .....	31
The Existing Activities Section .....	31
Go to an Activity .....	31
Search Activities .....	31
Sort Activities.....	32
Change the Layout of the Existing Activities Section .....	32
Hide the Existing Activities Section.....	32
Add a New Activity .....	32
Add an Activity Type .....	33
Edit an Activity Type .....	33
Delete an Activity Type.....	34
Add an Activity Status .....	34
Edit an Activity Status .....	34
Delete an Activity Status.....	34
Add an Activity Priority .....	34
Edit an Activity Priority .....	35
Delete an Activity Priority.....	35
Edit an Activity .....	35
Send an Email .....	35

Schedule a Follow up Activity .....	36
Create an Email Template .....	36
Merge Fields.....	37
List Builder .....	37
What is List Builder? .....	37
Add a List – Fill with Customers .....	37
Add a List – Fill with Invoices .....	38
Current List.....	38
Remove All Customers or Invoices from the Current List.....	38
Remove Specific Customers or Invoices from the Current List.....	39
Export the Current List to Excel .....	39
Refresh the Current List.....	39
Edit a Customer or Invoice from the Current List .....	39
Search Customers or Invoices from the Current List.....	39
Select a Customer or Invoice from the Current List .....	40
Sort the Current List .....	40
Change the layout of the Current List .....	40
Process List.....	40
Send an Email to a List of Select Customers or Invoices in the Current List .....	40
Send an Email to All Customers or Invoices in the Current List .....	41
Schedule a Follow-up Activity from the Current List.....	41
Call Center .....	43
Open the Call Center.....	43
Call Center Dashboard.....	43
What is the Call Center Dashboard? .....	43
Getting the Most Out of the Call Center Dashboard .....	43
My Calendar Section.....	43
Getting to the My Calendar Section of the Dashboard .....	43
Change the View of the Calendar on the Dashboard .....	44
Filter by Assigned To .....	44
Filter by Status.....	44
Hide the My Calendar Section of the Dashboard.....	45
My Cases .....	45
Getting to the My Cases Section of the Dashboard .....	45
Go to a Case on the Dashboard .....	45
Search Cases on the Dashboard.....	45
Sort Cases on the Dashboard .....	45
Change the Layout of the My Cases Section on the Dashboard .....	46

Create a New Case from the Dashboard .....	46
My Activities Se .....	46
Getting to the My Activities Section of the Dashboard .....	46
Go to an Activity .....	46
Search Activities on the Dashboard .....	47
Sort Activities on the Dashboard .....	47
Edit an Activity on the Dash .....	47
Change the layout of the My Activities Section on the Dashboard .....	47
Add a New Activity from the Dashboard .....	48
My Draft Solutions Section .....	48
Getting to the My Draft Solutions Section of the Dashboard .....	48
Go to a Solutio .....	48
Search Solutions on the Dashboard .....	48
Sort Solutions on the Dashboard.....	49
Change the layout of the My Draft Solutions Section on the Dashboard .....	49
Add a New Solution from the Dashboard .....	49
Cases.....	50
What are Cases? .....	50
Case Types .....	50
Getting to the Cases Tab Link.....	50
The Existing Cases Section.....	50
Go to a Case .....	50
Search Cases .....	50
Sort Cases .....	51
Change the Layout of the Existing Cases Section .....	51
Hide the Existing Cases Section .....	51
Add a New Case.....	51
Add a Case Status.....	52
Edit a Case Status.....	52
Delete a Case Status .....	52
Add a Case Origin .....	53
Edit a Case Origin .....	53
Delete a Case Origin.....	53
Add a Case Priority.....	53
Edit a Case Priority.....	53
Delete a Case Priority .....	54
Add a Case Type.....	54
Edit a Case Type.....	54

Delete a Case Type .....	54
Add a Case Reason .....	54
Edit a Case Reason .....	54
Delete a Case Reason .....	55
Edit a Case.....	55
Case Description – Review Previous Comments .....	55
Case Description – Add an Activity to a Case .....	55
Existing Activities for this Case .....	56
Go to an Activity Related to a Case .....	56
Search Activities Related to a Case .....	56
Edit an Activity Related to a Case.....	57
Sort Existing Activities for this Case .....	57
Change the layout of Existing Activities for this Case Section.....	57
Solutions .....	57
What is a Solution? .....	57
Solution Types.....	58
Getting to the Solutions Tab Link .....	58
The Existing Solutions Section .....	58
Go to a Solution.....	58
Search Solutions.....	58
Sort Solutions .....	58
Change the Layout of the Existing Solutions Section.....	59
Hide the Existing Solutions Section .....	59
Add a New Solution.....	59
Add a Solution Status.....	60
Edit a Solution Status.....	60
Delete a Solution Status .....	60
Add a Solution Type .....	60
Edit a Solution Type .....	60
Delete a Solution Type .....	61
Edit a Solution .....	61
Customer Portal .....	62
Initial Setup for Customer Portal.....	62
Include the Customer Portal on your Website .....	62
Select Tabs for Customers to View in the Customer Portal.....	62
Open the Customer Portal.....	63
Customer Registration for Online Account Access .....	63
Manually Create & Notify Customer of Login Info .....	63

Customer Portal Home .....	63
What is the Customer Portal Home? .....	63
Getting the Most Out of the Customer Portal Home .....	64
Account Balance/Most Recent Transactions .....	64
Change the Layout of the Most Recent Transactions Section .....	64
Recent Questions Section.....	64
Change the layout of the Recent Questions Section .....	64
Profile Section .....	65
Contact Us Section.....	65
Recent Transactions.....	65
Getting to the All Recent Transactions Table.....	65
Search All Recent Transactions .....	65
Sort All Recent Transactions.....	65
Change the layout of the All Recent Transactions Section.....	66
Unpaid Invoices.....	66
Getting to the Unpaid Invoices Table .....	66
Search Unpaid Invoices .....	66
Sort Unpaid Invoices .....	66
Change the layout of the Unpaid Invoices Section .....	66
Ask a Question .....	67
Search Existing Solutions Section.....	67
Getting to the Existing Solutions Section.....	67
Search Existing Solutions.....	67
Sort Existing Solutions.....	68
Change the Layout of the Existing Solutions Section.....	68
My Existing Questions .....	68
Getting to the My Existing Questions Section .....	68
Search My Existing Questions .....	68
Add comments/Responses to Existing Questions .....	69
Sort My Existing Questions.....	69
Change the layout of the My Existing Questions Section.....	69
Ask a New Question .....	69
Getting to Ask a New Question .....	70
Ask a New Question .....	70
My Profile .....	70
Contact & Address Info .....	70
Getting to the Contact & Address Info .....	70
Updating Contact & Address Info .....	71



Additional Info.....	71
Getting to Additional Info.....	71
Updating the Additional Info.....	71
Sign Out.....	71
Getting to Sign Out.....	71

# Sales Center

Ever wish you could store all your sales-related activities, opportunities and sales campaigns in one place? Ever wish you could track your sales performance and update activities and opportunity statuses on the fly from anywhere in the world or even send out mass emails quickly? Well here you go! The Sales Center is your one-stop shop to doing all this and more. From the Sales Center, you will manage sales-related activities, campaigns and opportunities all in one location.

## Open the Sales Center

Provided you are logged into Method, to access the Sales Center, click the **Sales Center** tab at the top of the Home screen. It's that easy! You are taken right to the Sales Center Dashboard!

## Sales Center Dashboard

What is the Sales Center Dashboard?

The Sales Center Dashboard is a reference tool that provides a bird's-eye view of your [Campaigns](#), [Opportunities](#), and [Activities](#). Based on the info contained in the dashboard, you can make important sales decisions, analyze sales and marketing campaigns for effectiveness, and track their progress.

As with all dashboards in Method, the Sales Center Dashboard is designed to be a point of reference that brings together snapshots of all the available tab links within the Sales Center, in this case specifically Campaigns, Opportunities and Activities. There's even a calendar on the dashboard to assist you with planning your day-to-day activities, manage follow-ups and meet deadlines. Use the dashboard to assist you with scheduling and monitoring the status of these aspects of your sales.

If you haven't dabbled too much into creating activities, opportunities or campaigns yet, the dashboard will look pretty bare. Once you begin to discover the power of the Sales Center, you'll find that this dashboard will become one of the most important hubs you'll ever encounter in Method.

## Getting the Most Out of the Sales Center Dashboard

At the top of the Sales Center Dashboard, you find user sign in information as well as tallies of active Campaigns, Opportunities and Incomplete Activities. This gives you a brief snapshot of your current workload and the tasks that you have outstanding. Click **Hide** in the upper right-hand corner of this section to hide the *Sales Center Dashboard* section. To display this section again, click **Show**.

## My Calendar Section

The *My Calendar* section displays a calendar view of all your activities. From here you can view all your activities in calendar format and filter activities by user(s) or by status. In typical dashboard style, the purpose of the *My Calendar* section is to help you get a snapshot of what tasks you've already completed and what still needs to be done. Use this as a planning tool to help you plan your day, week or month.

## Getting to the My Calendar Section of the Dashboard

To access the *My Calendar* section of the dashboard, follow the steps below:

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Calendar**.

## Change the View of the Calendar on the Dashboard

You can change the view of the calendar in a variety of ways. Using the date picker to the left of the screen will change the view of the day planner on the right of the screen. You can:

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Calendar**.
4. Select a view from the dropdown list, such as 'Day View' or 'Work Week View'.
5. Use the arrow keys next to the name of the month to move forward or backward
  - a. The '<<' or '>>' buttons in the date picker move the day planner forward or backward in yearly increments
  - b. The '<' or '>' buttons in the date picker move the day planner forward or backward in monthly increments
6. Highlight specific dates or a date range by clicking and holding the dates you wish to view in the date picker.

Click **Today** to return the day planner to today's date, in the appropriate view you selected.

Click **Refresh** at the bottom right to reload the My Calendar page reflecting changes.

### Filter by Assigned To

You can select a specific user or users for whom you wish the calendar to display results

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Calendar**.
4. In the *Filter by Assigned To* section, check the box next to the appropriate user name(s).
5. Click **Apply Filter**.

To remove the filter:

1. In the *Filter by Assigned To* section, uncheck the box next to the appropriate user name(s).
2. Click **Apply Filter**.

### Filter by Status

You can select to view calendar results by the status of activities.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Calendar**.

4. In the *Filter by Status* section, check the box next to the appropriate status. If there is more than one status, check all that apply.
5. Click **Apply Filter**.

To remove the filter:

1. In the *Filter by Status* section, uncheck the box next to the appropriate status.
2. Click **Apply Filter**.

## Hide the My Calendar Section of the Dashboard

To hide the date picker in *My Calendar* section of the Sales Center Dashboard when not in use, simply click **Hide** in the upper right corner of the date picker. To restore the date picker, click **Show**.

## My Campaigns

The *My Campaigns* section of the Sales Center Dashboard provides an overview of all existing campaigns in a simple, easy-to-read section. You can go to, search, sort or edit existing campaigns or create a new campaign from this area. You can also change the layout of the section to suit your needs.

## Getting to the My Campaigns Section of the Dashboard

To access the *My Campaigns* section of the dashboard, follow the steps below:

Click **Sales Center**.

Click **Sales Center Dashboard**.

Click **My Campaigns**.

## Go to a Campaign on the Dashboard

You can jump to any campaign right from the dashboard.

Click **Sales Center**.

Click **Sales Center Dashboard**.

Click **My Campaigns**.

Find the campaign you wish to go to in the section.

Click **Go to...** to the left of the campaign name.

## Search Campaigns on the Dashboard

You can also search for campaigns by using the search filter in the *My Campaigns* Section. Note: Filters are not case sensitive.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Campaigns**.
4. To search by campaign name, enter the first few letters of the campaign's name you wish to find in the blank field below the Name column header. The filter pulls only those campaigns that begin with those letters. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
5. Click **Go to...** next to the campaign you wish to view or edit.
6. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Campaigns on the Dashboard

You can sort campaigns according to column heading to assist you with interpreting the data.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Campaigns**.
4. Click the column heading you wish to sort by and the column will sort campaigns in ascending order. Click the column heading again to sort in descending order.

## Edit Campaigns on the Dashboard

Edit basic information contained in the section for a campaign directly from the dashboard, such as campaign name, status, type or date created. For full editing capabilities, you'll want to use the Go to... link on the left

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Campaigns**.
4. Click **Edit** to the right of the campaign you wish to edit.
5. Make any changes to the available fields.
6. Click **Update** to save any changes.
7. Click **Cancel** to cancel any changes and return to the *My Campaigns* section of the dashboard.

## Change the Layout of the Campaigns Section on the Dashboard

You can resize or change the order of the columns in the *Campaigns* section to suit your needs and/or preferences.

### Resize Columns of Campaigns Section

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Campaigns**.
4. Hold the cursor over the right edge of the column header you wish to resize.
5. Left-click and hold the mouse button.
6. Drag the column to the left to shorten, to the right to lengthen.
7. Release the mouse button.

### Change Column Order of Campaigns Section

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Campaigns**.
4. Click and hold the column header you wish to move.
5. Drag the column header to the location you wish to move it to.
6. Release the mouse button.
7. Repeat these steps as needed.

## Create a New Campaign from the Dashboard

You can also create a new campaign directly from the dashboard.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.

3. Click **My Campaigns**.
4. Click **New**.
5. Refer to [Add a New Campaign](#) in this chapter.

## My Opportunity Pipeline

The *My Opportunity Pipeline* section of the Sales Center Dashboard provides an overview of all existing [Opportunities](#) within a simple, easy-to-read section. You can go to, search, sort or edit existing opportunities or create a new opportunity from this area. You can also change the layout of the section to suit your needs.

## Getting to the My Opportunity Pipeline Section of the Dashboard

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Opportunity Pipeline**.

## Go to an Opportunity

You can jump to any opportunity right from the dashboard.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Opportunity Pipeline**.
4. Find the opportunity you wish to go to in the section.
5. Click **Go to...**

## Search Opportunities on the Dashboard

You can also search for opportunities by using the search filter in the *My Opportunities* Section. Note: Filters are not case sensitive.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Opportunity Pipeline**.
4. To search by campaign name, enter the first few letters of the campaign's name you wish to find in the blank field below the Name column header. The filter pulls only those campaigns that begin with those letters. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
5. Click **Go to...** next to the opportunity you wish to view or edit.
6. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Opportunities on the Dashboard

You can sort opportunities according to column heading to assist you with interpreting the data.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Opportunity Pipeline**.
4. Click the column heading you wish to sort by and the column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

## Edit an Opportunity on the Dashboard

To edit an opportunity directly from the dashboard, follow the steps below:

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Opportunity Pipeline**.
4. Find the opportunity you wish to edit in the section.
5. Click **Edit** to the right of the opportunity name.
6. Make any changes to the available fields.
7. Click **Update** to save any changes.
8. Click **Cancel** to cancel any changes and return to the *My Opportunity Pipeline* section of the dashboard.

## Change the layout of the Opportunities Section on the Dashboard

You can resize or change the order of the columns in the *Opportunities* Section to suit your needs and/or preferences.

### Resize Columns of Opportunities Section

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Opportunity Pipeline**.
4. Hold the cursor over the right edge of the column header you wish to resize.
5. Left-click and hold the mouse button.
6. Drag the column to the left to shorten; to the right to lengthen.
7. Release the mouse button.

### Change Column Order of Opportunities Section

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Opportunity Pipeline**.
4. Click and hold the column header you wish to move.
5. Drag the column header to the location you wish to move it to.
6. Release the mouse button.
7. Repeat these steps as needed.

## Create a New Opportunity from the Dashboard

You can also create a new opportunity directly from the dashboard.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Opportunity Pipeline**.
4. Click **New**.
5. Refer to [Add a New Opportunity](#) in this chapter.

## My Activities Section

The *My Activities* section of the Sales Center Dashboard provides an overview of all existing [Activities](#) in a simple, easy-to-read section. You can search, sort or edit existing activities or create a new activity from this area. You can also change the layout of the section to suit your needs.

## Getting to the My Activities Section of the Dashboard

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Activities**.

## Go to an Activity

You can jump to any activity right from the dashboard.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Activities**.
4. Find the activity you wish to go to in the section.
5. Click **Go to...**

## Search Activities on the Dashboard

You can also search for activities by using the search filter in the *My Activities* Section.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Activities**.
4. To search by activity name, enter the first few letters of the activity's name you wish to find in the blank field below the Name column header. The filter pulls only those activities that begin with those letters. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
5. Click **Go to...** next to the activity you wish to view or edit.
6. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Activities on the Dashboard

You can sort activities according to column heading to assist you with interpreting the data.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Activities**.
4. Click the column heading you wish to sort by and the column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

## Edit an Activity on the Dashboard

To edit an activity directly from the dashboard, follow the steps below:

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Activities**.
4. Find the activity you wish to edit in the section.
5. Click **Edit** to the right of the activity name.

## Change the layout of the Activities Section on the Dashboard

You can resize or change the order of the columns in the *Activities* Section to suit your needs and/or preferences.



### Resize Columns of Activities Section

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Activities**.
4. Hold the cursor over the right edge of the column header you wish to resize.
5. Left-click and hold the mouse button.
6. Drag the column to the left to shorten; to the right to lengthen.
7. Release the mouse button.

### Change Column Order of Activities Section

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Activities**.
4. Click and hold the column header you wish to move.
5. Drag the column header to the location you wish to move it to.
6. Release the mouse button.
7. Repeat these steps as needed.

### Add a New Activity from the Dashboard

You can also create a new activity directly from the dashboard.

1. Click **Sales Center**.
2. Click **Sales Center Dashboard**.
3. Click **My Activities**.
4. Click **New**.
5. Refer to [Add a New Activity](#) in this chapter.

## Campaigns

### What is a Campaign?

Campaigns are marketing projects for which you want to track success. Sales Opportunities and Activities can be set to relate to a Campaign, allowing you to view all your efforts directly from the Campaign screen.

In addition, Customers and Leads can be assigned to a Campaign helping you determine how many leads you are converting into sales. Use the Re-calculate button in the Planning & Analysis section to refresh your Campaign statistics.

### Campaign Types

Some of the most important operations within a company's Sales Department are campaigns. Whether your company is consumer credit lender and you intend to send out a mass-mailer advertisement regarding a special introductory offer, or you are a magazine wholesaler wanting to inform potential customers of a limited-time only renewal subscription discount, you will benefit from the power of a well-planned and well-managed campaign.

Method CRM is here to assist you with creating, updating, and tracking your campaign's progress and effectiveness. For your convenience, we have jam-packed Method CRM with templates of the most commonly used campaigns. Here's a list of the available campaign templates, taking note that if you don't find the one that

suits your needs best, you can always create a custom campaign to suit your specific business needs.

#### Campaign Templates in Method CRM:

Advertisement – Ideal for mass mailings or mass email promotions.

Banner Ads – Ideal for targeted audience-based web promotion.

Email – Ideal for targeted audiences, such as reminder notifications for expired accounts or renewals.

Other – Ideal for campaigns that don't fit in with your normal business operations.

Partners – Ideal for campaigns that are generated from partner or affiliate firms.

Public Relations – Ideal for campaigns conducted for the purpose of public relations.

Referral Program – Ideal for referral-based sales/marketing campaigns.

Seminar/Conference – Ideal for promotions that are specific to a seminar or conference that either your company organizes, or one organized by another company or organization.

Telemarketing – Ideal for promotions done via telemarketing.

### Getting to the Campaigns Tab Link

1. Click **Sales Center**.
2. Click **Campaigns**.

### The Existing Campaigns Section

The *Existing Campaigns* section appears at the top of the Campaigns screen. It allows you to view, search or sort existing campaigns. You can also change the layout of the Section to suit your needs.

### Go to a Campaign

You can jump to any campaign right from the *Existing Campaigns* section.

1. Click **Sales Center**.
2. Click **Campaigns**.
3. In the *Existing Campaigns* section, find the campaign you wish to go to in the section.
4. Click **Go to...** to the left of the campaign name.

### Search Campaigns

You can also search for campaigns by using the search filter in the *Existing Campaigns* section. Note: Filters are not case sensitive.

1. Click **Sales Center**.
2. Click **Campaigns**.
3. To search by campaign name, enter the first few letters of the campaign's name you wish to find in the blank field below the Name column header of the *Existing Campaigns* section. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
4. The filter pulls only those campaigns that begin with those letters.
5. Click **Select** next to the campaign you wish to view or edit.
6. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Campaigns

You can sort campaigns according to column heading to assist you with interpreting the data.

1. Click **Sales Center**.
2. Click **Campaigns**.
3. In the *Existing Campaigns* section, click the column heading you wish to sort by. The column will sort campaigns in ascending order.
4. Click the column heading again. The column will now sort campaigns in descending order.

## Change the Layout of the Existing Campaigns Section

You can resize or change the order of the columns in the Existing Campaigns Section to suit your needs and/or preferences.

### Resize Columns of the Existing Campaigns Section

1. Click **Sales Center**.
2. Click **Campaigns**.
3. In the *Existing Campaigns* section, hold the cursor over the right edge of the column header you wish to resize.
4. Right-click and hold the mouse button.
5. Drag the column to the left to shorten, to the right to lengthen.
6. Release the mouse button.

### Change Column Order of the Existing Campaigns Section

1. Click **Sales Center**.
2. Click **Campaigns**.
3. In the *Existing Campaigns* section, click and hold the column header you wish to move.
4. Drag the column header to the location you wish to move it to.
5. Release the mouse button.
6. Repeat these steps as needed.

## Hide the Existing Campaigns Section

To hide the *Existing Campaigns* section when not in use, simply click **Hide** in the upper right corner. To restore the section, click **Show**.

## Add a New Campaign

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Clear/New**.
4. Click **Add/Edit Campaign**.
5. In the *Name* box, type in the name of the campaign. (\*Required field)
6. Select *Assigned To* from the dropdown list, or type a user name. By default, the user who is currently logged in will be selected. (\*Required field)
7. Select *Type* from the dropdown list to select the type of campaign, or
  - a. Click **'...'** to edit or delete existing campaign types or add a new one
  - b. Refer to [Add a Campaign Type](#) in this chapter
8. Select *Status* from the dropdown list to select the status of the campaign, or
  - a. Click **'...'** to edit or delete existing campaign statuses or add a new one

- b. Refer to [Add a Campaign Status](#) in this chapter
9. Check the *Campaign is Active* box to have the campaign appear in your Sales Center Dashboard.
10. Uncheck the *Campaign is Active* box to not have the campaign appear in your Sales Center Dashboard.
11. In the *Description* box, type in what your campaign is. Include things such as its objectives, target audiences, etc.
12. Click **Save**.
13. Click **Planning & Analysis**.
  - a. Refer to [Planning and Analysis of a Campaign](#).

### Add a Campaign Status

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Add/Edit Campaign**.
4. Click '...' in the *Status* field.
5. Click **New**.
6. At the bottom of the grid, a blank line will appear. Under the *Status* column enter the new name for your campaign status.
7. Click **Update**.
8. Click **Close**.

### Edit a Campaign Status

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Add/Edit Campaign**.
4. Click '...' in the *Status* field.
5. Click **Edit** to the right of the campaign status you wish to edit.
6. In the *Status* field, edit the name of your *Status*.
7. Click **Update**.
8. Click **Close**.

### Delete a Campaign Status

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Add/Edit Campaign**.
4. Click '...' in the *Status* field.
5. Click **Delete** to the right of the campaign status you wish to delete.
6. Click **Close**.

### Add a Campaign Type

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Add/Edit Campaign**.
4. Click '...' in the *Type* field.
5. Click **New**.
6. At the bottom of the grid, a blank line will appear. Under the *Type* column enter the new name for your campaign type.
7. Click **Update**.
8. Click **Close**.

## Edit a Campaign Type

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Add/Edit Campaign**.
4. Click '...' in the *Type* field.
5. Click **Edit** to the right of the campaign type you wish to edit.
6. In the *Type* field, edit the name of your *Type*.
7. Click **Update**.
8. Click **Close**.

## Delete a Campaign Type

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Add/Edit Campaign**.
4. Click '...' in the *Type* field.
5. Click **Delete** to the right of the campaign type you wish to delete.
6. Click **Close**.

## Edit a Campaign

1. Click **Sales Center**.
2. Click **Campaigns**.
3. In the *Existing Campaigns* section, click **Select** next to the campaign you wish to edit.
4. Click **Add/Edit Campaign**.
5. Edit the information to your specifications.
  - a. Refer to [Add a New Campaign](#).
6. Click **Planning & Analysis**.
7. Edit the information to your specifications.
  - a. Refer to [Planning and Analysis of a Campaign](#).
8. Click **Add/Edit Campaign**.
9. Click **Save**.

## Planning & Analysis of a Campaign

After entering the identifying features of your new campaign, you'll want to enter in the timeline and analytic elements so you can begin tracking progress and effectiveness.

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Planning & Analysis**.
4. Select *Start Date* using the date picker.
5. Select *End Date* using the date picker.
6. Enter *Total Sent* representing a numeric total of communications sent out
  - a. You can leave this blank until after you've sent communications, or you can change this at any time during the campaign.
7. Enter *Expected Response Percent*.
8. Enter *Expected Revenue*.
9. Enter *Budgeted Cost*.
10. Enter *Actual Cost*.
  - a. You can leave this blank until after you complete the campaign, or you can change this at any time during the campaign

11. Click **Recalculate** to do an initial analysis of your data.

Note: Unless you enter expected and actual data in all the fields, you won't return any figures for analysis.

## Opportunities for this Campaign

The *Opportunities for this Campaign* section displays all opportunities associated with a particular campaign. From here you can view, add, edit or delete opportunities to a campaign, or add new ones. You can also sort the data or change the layout of the Section to suit your needs.

## Go to an Opportunity Related to a Campaign

You can jump to any opportunity related to a particular campaign right from *Opportunities for this Campaign* section

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Opportunities for this Campaign**.
4. Find the opportunity you wish to go to in the section.
5. Click **Go to...** to the left of the opportunity name.

## Search Opportunities Related to a Campaign

You can search for opportunities related to a campaign by using the search filter in the *Opportunities for this Campaign* section. Note: Filters are not case sensitive.

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Opportunities for this Campaign**.
4. To search by opportunity name, enter the first few letters of the opportunity's name you wish to find in the blank field below the Name column header of the *Opportunities for this Campaign* section. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
5. The filter pulls only those opportunities that begin with those letters.
6. Click **Go to...** next to the opportunity you wish to view or edit.
7. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Edit an Opportunity Related to a Campaign

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Opportunities for this Campaign**.
4. Click **Go to...** next to the opportunity you wish to view or edit.
5. Edit the information to your specifications.
  - a. Refer to [Add a New Opportunity](#) in this chapter for assistance with this section
6. Click **Save**.

## Sort Opportunities for this Campaign

You can sort the opportunities for a campaign by column heading to assist you with interpreting the data.

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Opportunities for this Campaign**.
4. Click the column heading you wish to sort by. The column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

## Change the layout of Opportunities for this Campaign Section

You can resize or change the order of the columns in the Opportunities for this Campaign Section to suit your needs and/or preferences.

### Resize Columns of Opportunities for this Campaign Section

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Opportunities for this Campaign**.
4. Hold the cursor over the right edge of the column header you wish to resize.
5. Right-click and hold the mouse button.
6. Drag the column to the left to shorten; to the right to lengthen.
7. Release the mouse button.

### Change Column Order of Opportunities for this Campaign Section

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Opportunities for this Campaign**.
4. Click and hold the column header you wish to move.
5. Drag the column header to the location you wish to move it to.
6. Release the mouse button.
7. Repeat these steps as needed.

## Activities for this Campaign

The *Activities for this Campaign* section displays all activities associated with a particular campaign. From here you can view, add, edit or delete activities to a campaign, or add new ones. You can also sort the data or change the layout of the section to suit your needs.

## Go to an Activity Related to a Campaign

You can jump to any activity related to a particular campaign right from Activities for this Campaign section

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Activities for this Campaign**.
4. Find the activity you wish to go to in the section.
5. Click **Go to...** to the left of the activity name.

## Search Activities Related to a Campaign

You can search for activities related to a campaign by using the search filter in the *Activities for this Campaign* section. Note: Filters are not case sensitive.

1. Click **Sales Center**.
2. Click **Campaigns**.

3. Click **Activities for this Campaign**.
4. To search by activity name, enter the first few letters of the activity's name you wish to find in the blank field below the Name column header of the *Activities for this Campaign* section. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
5. The filter pulls only those activities that begin with those letters.
6. Click **Go to...** next to the activity you wish to view or edit.
7. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

### Edit an Activity Related to a Campaign

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Activities for this Campaign**.
4. Click **Go to...** next to the activity you wish to edit.
5. Click **Add/Edit Activity**.
  - a. Edit the information to your specifications
  - b. Refer to [Add a New Activity](#) in this chapter for assistance with this section
6. Click **Save**.

### Sort Activities for this Campaign

You can sort the activities for a campaign by column heading to assist you with interpreting the data.

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Activities for this Campaign**.
4. Click the column heading you wish to sort by. The column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

### Change the layout of Activities for this Campaign Section

You can resize or change the order of the columns in the *Activities for this Campaign* section to suit your needs and/or preferences.

#### Resize Columns of Activities for this Campaigns Section

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Activities for this Campaign**.
4. Hold the cursor over the right edge of the column header you wish to resize.
5. Right-click and hold the mouse button.
6. Drag the column to the left to shorten; to the right to lengthen.
7. Release the mouse button.

#### Change Column Order of Activities for this Campaign Section

1. Click **Sales Center**.
2. Click **Campaigns**.
3. Click **Activities for this Campaign**.
4. Click and hold the column header you wish to move.



5. Drag the column header to the location you wish to move it to.
6. Release the mouse button.
7. Repeat these steps as needed.

## Opportunities

### What is an Opportunity?

Opportunities are the pending sales and deals that you currently have in your "pipeline". For each Opportunity you can set the dollar amount indicating the proposed value of the deal and the probability percent of closing it, so that you can forecast your total pipeline sales as well as expected total sales.

If the Opportunity is a result of a marketing Campaign you should make sure you relate it to the Campaign so that you can measure the effectiveness and ROI (Return on Investment) of your marketing efforts.

### Opportunity Types

In the Sales Center, there are two types of Opportunities: Existing Business and New Business. Existing Business is sales that are generated from an existing customer. New Business is sales that are generated from new customers.

### Getting to the Opportunities Tab Link

1. Click **Sales Center**.
2. Click **Opportunities**.

### The Existing Opportunities Section

The *Existing Opportunities* section appears at the top of the Opportunities screen. It allows you to view, search or sort existing opportunities. You can also change the layout of the section to suit your needs.

### Go to an Opportunity

You can jump to any opportunity right from *Existing Opportunities* section.

1. Click **Sales Center**.
2. Click **Opportunities**.
3. In the *Existing Opportunities* section, find the opportunity you wish to go to in the section.
4. Click **Select** to the left of the opportunity name.

### Search Opportunities

You can also search for Opportunities by using the search filter in the *Existing Opportunities* section. Note: Filters are not case sensitive.

1. Click **Sales Center**.
2. Click **Opportunities**.
3. To search by opportunity name, enter the first few letters of the opportunity's name you wish to find in the blank field below the Name column header of the *Existing Opportunities* section. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).

4. The filter pulls only those opportunities that begin with those letters.
5. Click **Select** next to the opportunity you wish to view or edit.
6. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Opportunities

You can sort opportunities according to column heading to assist you with interpreting the data.

1. Click **Sales Center**.
2. Click **Opportunities**.
3. In the *Existing Opportunities* section, click the column heading you wish to sort by. Click the column heading you wish to sort by. The column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

## Change the Layout of the Existing Opportunities Section

You can resize or change the order of the columns in the *Existing Opportunities* section to suit your needs and/or preferences.

### Resize Columns of the Existing Opportunities Section

1. Click **Sales Center**.
2. Click **Opportunities**.
3. In the *Existing Opportunities* section, hold the cursor over the right edge of the column header you wish to resize.
4. Right-click and hold the mouse button.
5. Drag the column to the left to shorten, to the right to lengthen.
6. Release the mouse button.

### Change Column Order of the Existing Opportunities Section

1. Click **Sales Center**.
2. Click **Opportunities**.
3. In the *Existing Opportunities* section, click and hold the column header you wish to move.
4. Drag the column header to the location you wish to move it to.
5. Release the mouse button and the column moves to the new destination.
6. Repeat these steps as needed.

## Hide the Existing Opportunities Section

To hide the *Existing Opportunities* section when not in use, simply click **Hide** in the upper right corner. To restore the section, click **Show**.

## Add a New Opportunity

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Add/Edit Opportunity**.
4. In the *Name* field, type in the name for your new opportunity. (\*Required field)
5. Select *Assigned To* from the dropdown list, or type a user name. (\*Required field)

6. Select *Customer* from the dropdown list (\*Required field), or
  - a. Click '...' to edit or delete existing customers or add a new one.
7. Select *Stage* from the dropdown list (\*Required field), or
  - a. Click '...' to edit or delete existing stages or add a new one.
  - b. Refer to the [Add an Opportunity Stage](#) section in this chapter.
8. Select *Close Date* using the date picker. (Required field)
9. Select *Campaign* the dropdown list to relate this opportunity to a campaign, or
  - a. Click '...' to edit or delete existing campaigns or add a new one.
  - b. Refer to the [Add a New Campaign](#) section in this chapter.
10. Select *Type* from the dropdown list, or
  - a. Click '...' to edit or delete existing types or add a new one.
  - b. Refer to the [Add an Opportunity Type](#) section in this chapter.
11. Enter *Probability Percent*.
12. Enter *Amount*.
13. Select *Lead Source* from the dropdown list, or
  - a. Click '...' to edit or delete existing lead sources or add a new one.
  - b. Refer to the [Add an Opportunity Lead Source](#) in this chapter.
14. Enter *Next Step*.
15. Enter *Description* for reference.
16. Click **Save**.

### Add an Opportunity Stage

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Add/Edit Opportunity**.
4. Click '...' in the *Stage* field.
5. Click **New**.
6. Enter *Stage*.
7. Click **Update**.
8. Click **Close**.

### Edit an Opportunity Stage

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Add/Edit Opportunity**.
4. Click '...' in the *Stage* field.
5. Click **Edit** to the right of the stage you wish to edit.
6. Edit *Stage* field.
7. Click **Update**.
8. Click **Close**.

### Delete an Opportunity Stage

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Add/Edit Opportunities**.
4. Click '...' in the *Stage* field.
5. Click **Delete** to the right of the stage you wish to delete.
6. Click **Close**.

### Add an Opportunity Type

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Add/Edit Opportunity**.
4. Click '...' in the *Type* field.
5. Click **New**.
6. Enter *Type*.
7. Click **Update**.
8. Click **Close**.

### Edit an Opportunity Type

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Add/Edit Opportunities**.
4. Click '...' in the *Type* field.
5. Click **Edit** to the right of the type you wish to edit.
6. Edit *Type* field.
7. Click **Update**.
8. Click **Close**.

### Delete an Opportunity Type

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Add/Edit Opportunities**.
4. Click '...' in the *Type* field.
5. Click **Delete** to the left of the stage you wish to delete.
6. Click **Close**.

### Add an Opportunity Lead Source

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Add/Edit Opportunity**.
4. Click '...' in the *Lead Source* field.
5. Click **New**.
6. Enter *Lead Source*.
7. Click **Update**.
8. Click **Close**.

### Edit an Opportunity Lead Source

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Add/Edit Opportunity**.
4. Click '...' in the *Lead Source* field.
5. Click **Edit** to the right of the lead source you wish to edit.
6. Edit *Lead Source* field.
7. Click **Update**.
8. Click **Close**.

## Delete an Opportunity Lead Source

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Add/Edit Opportunity**.
4. Click '...' in the *Lead Source* field.
5. Click **Delete** to the right of the lead source you wish to delete.
6. Click **Close**.

## Edit an Opportunity

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Select** next to the opportunity you wish to edit in the *Existing Opportunities* section.
4. Click **Add/Edit Opportunity** section tab.
5. Edit the information to your specifications.
  - a. Refer to [Add a New Opportunity](#) in this chapter for assistance with this section
6. Click **Save**.

## Activities for this Opportunity

The *Activities for this Opportunity* section displays all activities associated with a particular opportunity. From here you can view, add, edit or delete activities related to an opportunity, or add new ones. You can also sort the data or change the layout of the section to suit your needs.

## Go to an Activity Related to an Opportunity

You can jump to any activity related to a particular opportunity right from *Activities for this Opportunity* section.

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Activities for this Opportunity**.
4. Find the activity you wish to go to in the section.
5. Click **Go to...** to the left of the activity name.

## Search Activities Related to an Opportunity

You can search for activities related to an opportunity by using the search filter in the *Activities for this Opportunity* section. Note: Filters are not case sensitive.

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Activities for this Opportunity**.
4. To search by activity name, enter the first few letters of the activity's name you wish to find in the blank field below the Name column header of the *Activities for this Opportunity* section. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
5. The filter pulls only those activities that begin with those letters.
6. Click **Go to...** next to the activity you wish to view or edit.
7. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Edit an Activity Related to an Opportunity

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Activities for this Opportunity**.
4. Click **Go to...** next to the activity you wish to edit in the *Activities for this Opportunity* section.
5. Click **Add/Edit Activity**.
6. Edit the information to your specifications.
  - a. Refer to [Add a New Activity](#) in this chapter for assistance with this section.
7. Click **Save**.

## Sort Activities for this Opportunity

You can sort the activities for an opportunity by column heading to assist you with interpreting the data.

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Activities for this Opportunity**.
4. Click the column heading you wish to sort by. The column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

## Change the layout of Activities for this Opportunity Section

You can resize or change the order of the columns in the *Activities for this Opportunity* section to suit your needs and/or preferences.

### Resize Columns of Activities for this Opportunity Section

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Activities for this Opportunity**.
4. Hold the cursor over the right edge of the column header you wish to resize.
5. Right-click and hold the mouse button.
6. Drag the column to the left to shorten; to the right to lengthen.
7. Release the mouse button.

### Change Column Order of Activities for this Opportunity Section

1. Click **Sales Center**.
2. Click **Opportunities**.
3. Click **Activities for this Opportunity**.
4. Click and hold the column header you wish to move.
5. Drag the column header to the location you wish to move it to.
6. Release the mouse button.
7. Repeat these steps as needed.

# Activities

## What is an Activity?

An Activity is your way of tracking each and every contact you have with your customers and vendors. Optionally, activities can relate to an ongoing "Case", "Opportunity" or "Campaign", or any other section you setup.

In addition to tracking what has already occurred, activities can serve as reminders of future tasks, and each task can be assigned to a user who is responsible for completing it. When users of your system sign in, they should see which activities are assigned to them, and when the activity is due.

How to use Activities:

First decide whether the activity is related to something else, like a Case or Opportunity. If so, it may be easiest to enter the Activity under the Case or Opportunity screen. Otherwise, enter the activity here in the Activities screen. Under the Schedule Follow Up section, you can specify whether you want to setup a future activity related to this one.

## Activity Types

There are five types of activities in the Sales Center.

1. Email Received: Used when you receive an email.
2. Email Sent: Used when you send an email.
3. Phone Call Incoming: Used when you receive a phone call.
4. Phone Call Outgoing: Used when you make a phone call.
5. Other: Used when none of the other types apply.

## Getting to the Activities Tab Link

1. Click **Sales Center**.
2. Click **Activities**.

## The Existing Activities Section

The *Existing Activities* section appears at the top of the Activities screen. It allows you to view, search or sort existing activities. You can also change the layout of the section to suit your needs.

## Go to an Activity

You can jump to any activity right from *Existing Activities* section.

1. Click **Sales Center**.
2. Click **Activities**.
3. In the *Existing Activities* section, find the activity you wish to go to in the section.
4. Click **Go to...** to the left of the activity name.

## Search Activities

You can also search for activities by using the search filter in the *Existing Activities* section. Note: Filters are not case sensitive.

1. Click **Sales Center**.
2. Click **Activities**.
3. To search by activity number, enter the first few numbers of the activity's number you wish to find in the blank field below the Activity No. column header of the *Existing Activities* section. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
4. The filter pulls only those activities that begin with those numbers.
5. Click **Select** next to the activity you wish to view or edit.
6. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Activities

You can sort activities according to column heading to assist you with interpreting the data.

1. Click **Sales Center**.
2. Click **Activities**.
3. In the *Existing Activities* section, click the column heading you wish to sort by. The column will sort activities in ascending order. Click the column heading again and the column will sort activities in descending order.

## Change the Layout of the Existing Activities Section

You can resize or change the order of the columns in the *Existing Activities* section to suit your needs and/or preferences.

### Resize Columns of the Existing Activities Section

1. Click **Sales Center**.
2. Click **Activities**.
3. In the *Existing Activities* section, hold the cursor over the right edge of the column header you wish to resize.
4. Right-click and hold the mouse button.
5. Drag the column to the left to shorten, to the right to lengthen.
6. Release the mouse button.

### Change Column Order of the Existing Activities Section

1. Click **Sales Center**.
2. Click **Activities**.
3. In the *Existing Activities* section, click and hold the column header you wish to move.
4. Drag the column header to the location you wish to move it to.
5. Release the mouse button.
6. Repeat these steps as needed.

## Hide the Existing Activities Section

To hide the *Existing Activities* section when not in use, simply click **Hide** in the upper right corner. To restore the section, click **Show**.

## Add a New Activity

1. Click **Sales Center**.



2. Click **Activities**.
3. Click **Add/Edit Activity**.
4. Select *Type* from the dropdown list (\*Required field), or
  - a. Click '...' to edit or delete existing types or add a new one.
  - b. Refer to the [Add an Activity Type](#) section in this chapter.
5. Select *User* from the *Assigned To* dropdown list (\*Required field)
6. Select *Status* from the dropdown list, or
  - a. Click '...' to edit or delete existing statuses or add a new one.
  - b. Refer to the [Add an Activity Status](#) section in this chapter.
7. Select *Priority* from the dropdown list, or
  - a. Click '...' to edit or delete existing priorities or add a new one.
  - b. Refer to the [Add an Activity Priority](#) section in this chapter.
8. Enter *Due Date*.
9. Select *Customer/Vendor* from the dropdown list, or
  - a. Click '...' to edit or delete existing priorities or add a new one.
10. Enter *Contact Name*.
11. Enter *Contact Phone*.
12. Enter *Start Date*.
13. Enter *Completed Date*.
14. Enter *Duration*.
  - a. Leave blank and duration will populate automatically when *Completed Date* is entered.
15. *Relate to Case*, select from the dropdown list, or
  - a. Click '...' to edit or delete existing cases or add a new one.
  - b. Refer to [Add a New Case](#).
16. *Relate to Opportunity No.*, select from the dropdown list, or
  - a. Click '...' to edit or delete existing opportunities or add a new one.
  - b. Refer to [Add a New Opportunity](#) in this chapter.
17. *Relate to Campaign*, select from the dropdown list, or
  - a. Click '...' to edit or delete existing campaigns or add a new one.
  - b. Refer to [Add a New Campaign](#) in this chapter.
18. Enter *Comments*
  - a. Note: These are internal comments for other users to view.
  - b. Format the comments section accordingly. The text you enter here will compose the body of the email, be sure to utilize the Design, HTML and Preview buttons at the bottom of this section.
19. Click **Save & New**.

### Add an Activity Type

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Add/Edit Activity**.
4. Click '...' in the *Type* field.
5. Click **New**.
6. Enter *Activity Type*.
7. Click **Update**.
8. Click **Close**.

### Edit an Activity Type

1. Click **Sales Center**.
2. Click **Activities**.

3. Click **Add/Edit Activity**.
4. Click '...' in the *Type* field.
5. Click **Edit** to the right of the type you wish to edit.
6. Edit *Activity Type* field.
7. Click **Update**.
8. Click **Close**.

### Delete an Activity Type

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Add/Edit Activity**.
4. Click '...' in the *Type* field.
5. Click **Delete** to the right of the type you wish to delete.
6. Click **Close**.

### Add an Activity Status

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Add/Edit Activity**.
4. Click '...' in the *Status* field.
5. Click **New**.
6. Enter *Activity Status*.
7. Click **Update**.
8. Click **Close**.

### Edit an Activity Status

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Add/Edit Activity**.
4. Click '...' in the *Status* field.
5. Click **Edit** to the right of the status you wish to edit.
6. Edit *Activity Status* field.
7. Click **Update**.
8. Click **Close**.

### Delete an Activity Status

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Add/Edit Activity**.
4. Click '...' in the *Status* field.
5. Click **Delete** to the right of the status you wish to delete.
6. Click **Close**.

### Add an Activity Priority

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Add/Edit Activity**.
4. Click '...' in the *Priority* field.
5. Click **New**.

6. Enter *Activity Priority*.
7. Click **Update**.
8. Click **Close**.

### Edit an Activity Priority

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Add/Edit Activities**.
4. Click '...' in the *Priority* field.
5. Click **Edit** to the right of the priority you wish to edit.
6. Edit *Activity Priority* field.
7. Click **Update**.
8. Click **Close**.

### Delete an Activity Priority

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Add/Edit Activity**.
4. Click '...' in the *Priority* field.
5. Click **Delete** to the right of the priority you wish to delete.
6. Click **Close**.

### Edit an Activity

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Select** next to the activity you wish to edit.
4. Click **Add/Edit Activity** section tab.
  - a. Edit the information to your specifications.
  - b. Refer to [Add a New Activity](#) in this chapter.
5. Click **Save**.

### Send an Email

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Send an Email**.
4. Check the box next to *Send email using template*, if you are using an email template.
  - a. Select an email from the dropdown list, or
  - b. Click '...' to edit or delete existing email templates or add a new one.
  - c. Refer to [Create an Email Template](#) in this chapter.
5. Uncheck the box next to *Send email using template*, if you are not using an email template.
6. Enter *To*.
7. Enter *From*.
8. Enter *From Name*.
  - a. If you're sending an email on behalf of a department, you may want to enter a general name such as Accounts Receivable or Billing. Otherwise simply add the name of the person as you would like it to read, ex., Mrs. Jane Harvey
9. Enter *Cc* address, if any.

10. Enter *Bcc* address, if any.
11. Enter *Subject*.
12. Compose your email.
  - a. Format the text accordingly since what you enter here will compose the body of the email. Be sure to utilize the Design, HTML and Preview buttons at the bottom of this section.
13. Click **Add/Edit Activity**.
14. Click **Save & New**.

### Schedule a Follow up Activity

1. Click **Sales Center**.
2. Click **Activities**.
3. Check the *Create follow-up* box.
4. Select *Follow-up date* using the date picker.
5. Select *Follow-up Assigned To* from the dropdown list.
6. Select *Follow-up Type* from the dropdown list, or
  - a. Click *'...'* to edit or delete existing follow up types or add a new one.
  - b. Refer to [Add an Activity Type](#) section.
7. Select *Follow-up Status* from the dropdown list, or
  - a. Click *'...'* to edit or delete an existing activity status type or add a new one.
  - b. Refer to [Add an Activity Status](#) section.
8. Enter *Follow-up* comments for reference.
9. Click **Add/Edit Activity**.
10. Click **Save & New**.

### Create an Email Template

1. Click **Sales Center**.
2. Click **Activities**.
3. Click **Send an Email**.
4. Click *'...'* next in the *Send email using template* field.
5. Enter *Name* for the new email template. (\*Required field)
6. *Assign To* using the dropdown list.
7. Enter *To* address.
8. Enter *Cc* address.
9. Enter *Bcc* address.
10. Enter *From* address.
11. Enter *Subject*.
12. Create the body of your email.
  - a. Format the text accordingly since what you enter here will compose the body of the email. Be sure to utilize the Design, HTML and Preview buttons at the bottom of this section. These are helpful when formatting the body of your email so you can see how it will look to the recipients.
  - b. Refer to the [Merge fields](#) section in this chapter.
13. Click **Save**.

Your new template email appears in the Email Template List to the left of the window. To make additional changes to the template you just created, or to any of the other available templates, click **Select** next to the template name. The details of the selected template appear in the *Add/Edit Template* section on the right.

## Merge Fields

Merge fields allow you have values from table appear in your email, such as a customer's name, the total amount due on their account, or the email signature of the user sending the email. There are two steps to setting up merge fields.

Enter merge fields in your email template.

Type in your merge fields in a TableName.FieldName format. So if you wanted to have an email start with "Dear Bob," you would type in "Dear Customer.FirstName,". If you wanted to sign your email with the user's signature, you would finish it with "Users.EmailSignature".

Use the 'Replace merge fields' action.

If you are not the designer of your system, this step should already be done for you. If you are a designer, however, you'll need to do some extra work to make sure that the merge fields actually get replaced with real values. For every table used in merge fields, you'll need to run a Character Function action, specifically the 'Replace merge fields' command, to replace the merge fields with real values.

## List Builder

### What is List Builder?

The List Builder is a way for you to:

Mass email customers or leads for a marketing Campaign.

Create a batch of follow-up Activities for your sales team, which may or may not be related to a Campaign.

Mass email customers for overdue balances.

Send customers a customized e-Newsletter.

Mass email customers that have recently received an Estimate.

Customize this screen to perform any other purpose that requires batch processing.

How to use the List Builder screen:

First click **Remove All** to delete any existing customers in the Current List section.

Use the *Fill List With* section to populate the Current List with your "fill" choices.

Return to the Current List to manually remove unwanted entries.

Choose your Process List options, and then click Process List.

It is important to note that there are 2 types of lists you can create using List Builder.

1. A list of customers
  - a. Targets active customers, inactive customers, or both
  - b. Targets customers in Lead status, not in Lead status, or both
2. A list of invoices
  - a. Targets customers with outstanding invoices
  - b. Can be sorted amongst different date ranges

### Add a List – Fill with Customers

Create a list of recipients for mass emails, follow-up activities, newsletters, etc. using the Customer List from the Customer Center.

1. Click **Sales Center**.
2. Click **List Builder**.
3. Click **Current List**.
4. Click **Remove All** to delete any existing customers in the *Current List* section
5. Click **Fill List With**.
6. Check *Is Active* to include only customers with an active status in the list.
7. Check *Is Not Active* to include customers with an inactive status in the list.
8. Check *Both* to include both active and inactive customers in the list.
9. Check *Include customers with empty email addresses* to include customer records for whom you do not have email addresses.
10. Uncheck *Include customers with empty email addresses* to exclude customer records for whom you do not have email addresses.
11. Click **Fill with Customers**.

You are automatically redirected to the *Current List* section and the customers with the appropriate specifications you selected above populate the current list. From the Current List, manually remove any unwanted entries. Refer to [Remove Specific Customers or Invoices from the Current List](#).

### Add a List – Fill with Invoices

Create a list of recipients for mass emails, follow-up activities, newsletters, etc. using Existing Invoices from the Customer Center.

1. Click **Sales Center**.
2. Click **List Builder**.
3. Click **Current List**.
4. Click **Remove All** to delete any existing customers in the *Current List* section.
5. Click **Fill List With**.
6. Enter *Balance Due* greater than threshold.
7. Enter *Due date from* using the date picker.
8. Enter *Due date to* using the date picker.
9. Click **Fill with Invoices**.

You are automatically redirected to the *Current List* section and the invoices with the appropriate specifications you selected above populate the current list. From the Current List, manually remove any unwanted entries. Refer to [Remove Specific Customers or Invoices from the Current List](#).

### Current List

The Current List is a list of customers or invoices that you populate using specific criteria from the *Fill List With* section of the List Builder. Use the Current List screen to view, remove, export and/or edit customers or invoices. It is important to note that the Current List is only a copy of real data and deleting entries to the Current List will not delete them from the Customer Center.

### Remove All Customers or Invoices from the Current List

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. Click **Remove All** in the Current List screen of List Builder.

## Remove Specific Customers or Invoices from the Current List

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. Find the customer or invoice in the Current List you wish to delete.
3. Check the box that corresponds to the customer or invoice you wish to delete.
4. Repeat Steps 1 & 2 until all customers or invoices you wish to delete are checked.
5. Click **Remove Checked**.

## Export the Current List to Excel

This is helpful when doing mail-out campaigns. You can export the Current List to Excel and do a mail merge.

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. Click **Export to Excel**.
3. Click **Download Excel Report** when prompted.
4. Click **Cancel** to close the Excel report without opening or saving the file, or
5. Open or Save the report to your computer or network.
  - a. Clicking **Open** launches Excel and creates a spreadsheet the data from the Current List.
  - b. Clicking **Save** prompts you to rename the report so you can retrieve it when needed.
6. Click **Close** to exit without downloading the report.

## Refresh the Current List

To reload the Current List to reflect any changes, click **Refresh**.

## Edit a Customer or Invoice from the Current List

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. Click **Edit** next to the customer or invoice you wish to edit.
3. Make any changes to the available fields.
4. Click **Update**.
5. Click **Cancel** to return to the Current List making no changes.

## Search Customers or Invoices from the Current List

You can search for specific customers or invoices within the Current List by using the search fields in the Current List screen. These are the blank fields that appear in the top row of the Current List.

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. To search by customer name, enter the first few letters of the customer's name you wish to find in the blank field below the Customer column header.
3. The filter pulls only those customers that begin with those letters. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
4. Click **Edit** next to the customer or invoice you wish to view or edit.
5. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Select a Customer or Invoice from the Current List

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. Check the box next to the customer or invoice you wish to select.
3. Uncheck the box to remove the customer or invoice from your selection.
4. Check the box in the header row to select all customers or invoices on the screen.

## Sort the Current List

You can sort the columns of the Current List by column heading to assist you with interpreting the data.

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#)
2. Click the column heading you wish to sort by. The column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

## Change the layout of the Current List

You can resize or change the order of the columns in the Current List to suit your needs and/or preferences.

### Resize Columns of the Current List

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. Hold the cursor over the right edge of the column header you wish to resize.
3. Right-click and hold the mouse button.
4. Drag the column to the left to shorten; to the right to lengthen.
5. Release the mouse button.

### Change Column Order of the Current List

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. Click and hold the column header you wish to move.
3. Drag the column header to the location you wish to move it to.
4. Release the mouse button.
5. Repeat these steps as needed.

## Process List

The Process List screen is where you tell Method what you want done to the Current List you created; more specifically whether you want to send a mass email, scheduling a follow-up activity or both.

## Send an Email to a List of Select Customers or Invoices in the Current List

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. Select the customers or invoices you wish to include in the email.
  - a. Refer to [Select a Customer or Invoice from the Current List](#)
3. Click **Process List**.
4. Check the *Only process checked rows* box.



5. Check the *Send email using template* box, if you wish to send an email using a template,
  - a. Select the email template you wish to use from the dropdown box.
  - b. If you wish to create a new email template, refer to the [Create an Email Template](#) section in this chapter.
6. Uncheck the *Send email using template* box if you do not wish to send an email using a template.
7. Enter *From Name* in the format you wish it to display in the email, ex. Mrs. Jane Harvey.
8. Enter *From Email*.
9. Enter *Cc* address, if any.
10. Enter *Bcc* addresses, if any.
11. If you wish to schedule a follow-up activity now, refer to the [Schedule a Follow-Up Activity from the Current List](#) section in this chapter now.
12. Click **Process List**.

### Send an Email to All Customers or Invoices in the Current List

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. Select the customers or invoices you wish to include in the email.
  - a. Refer to [Select a Customer or Invoice from the Current List](#)
3. Click **Process List**.
4. Uncheck the *Only process checked rows* box.
5. Check the *Send email using template* box, if you wish to send an email using a template,
  - a. Select the email template you wish to use from the dropdown box.
  - b. If you wish to create a new email template, refer to the [Create an Email Template](#) section in this chapter.
6. Uncheck the *Send email using template* box, if you do not wish to send an email using a template.
7. Enter *From Name* in the format you wish it to display in the email, ex. Mrs. Jane Harvey.
8. Enter *From Email*.
9. Enter *Cc* address, if any.
10. Enter *Bcc* addresses, if any.
11. If you wish to schedule a follow-up activity now, refer to the [Schedule a Follow-Up Activity from the Current List](#) section in this chapter now.
12. Otherwise click **Process List**.

### Schedule a Follow-up Activity from the Current List

1. Follow the steps to fill the Current List with either [customers](#) or with [invoices](#).
2. Select the customers or invoices you wish to include in the email.
  - a. Refer to [Select a Customer or Invoice from the Current List](#)
3. Click **Process List**.
4. If you wish to send an email, refer to the [Send an Email to a List of Select Customers or Invoices in the Current List](#) or the [Send an Email to All Customers or Invoices in the Current List](#) now.
5. Check the *Schedule a Follow-up Activity* box.
6. Select *Follow-up Date* using the date picker.
7. Select *Follow-up Assigned To* from the dropdown list.

8. Select *Follow-up Type* from the dropdown list.
9. Select *Follow-up Status* from the dropdown list.
10. Select *Follow-up Campaign* from the dropdown to associate the activity to a campaign.
11. Enter *Follow-up Comments* for the assigned user to reference.
12. Click **Process List**.

# Call Center

The call center section of Method is an area intended to serve as a one-stop location where you as the user can go to get the latest updates on in-progress activities, active cases and drafted or published solutions to customer-related inquiries. There are of course perks to all this of course; there is huge potential for you to see an increase in customer satisfaction by utilizing these tools to manage and deliver a higher caliber of service to your customers.

## Open the Call Center

To access the Call Center, click the **Call Center** tab at the top of the Home screen. It's that easy! You are taken right to the Call Center Dashboard!

## Call Center Dashboard

### What is the Call Center Dashboard?

The Call Center Dashboard is a reference tool that provides a snapshot view of your open cases, corresponding activities, calendars and draft solutions. From here you can make important decisions, analyze and track progress while keeping an eye on what's happening now.

As with all dashboards, the Call Center Dashboard is designed to be a reference tool that brings together snapshots of all the available tab links within the Call Center, use the dashboard to assist you with scheduling and monitoring the status of these areas of your business. And just remember the view will change depending on what's currently in progress in these areas making it both dynamic and relevant.

### Getting the Most Out of the Call Center Dashboard

At the top of the Call Center Dashboard, you find user sign in information as well as tallies of active Cases, Incomplete Activities and Unpublished Solutions. This gives you a brief snapshot of your current workload and the tasks that you have outstanding. Click **Hide** in the upper right-hand corner of this section to hide the Sales Center Dashboard section. To display this section again, click **Show**.

### My Calendar Section

Being on top of things has never been easier. The *My Calendar* section displays a calendar view of all your activities. From here you can view all your activities in calendar format and filter activities by user(s) or by status. In typical dashboard style, the purpose of the *My Calendar* section is to help you get a snapshot of what tasks you've already completed and what still needs to be done. Use this as a planning tool to help you plan your day, week or month.

### Getting to the My Calendar Section of the Dashboard

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Calendar**.

## Change the View of the Calendar on the Dashboard

You can change the view of the calendar in a variety of ways. Using the date picker to the left of the screen will change the view of the day planner on the right of the screen. You can:

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Calendar**.
4. Select a view from the dropdown list, such as 'Day View' or 'Work Week View'.
5. Use the arrow keys next to the name of the month to move forward or backward.
  - a. The '<<' or '>>' buttons in the date picker move the day planner forward or backward in yearly increments.
  - b. The '<' or '>' buttons in the date picker move the day planner forward or backward in monthly increments.
6. Highlight specific dates or a date range by clicking and holding the dates you wish to view in the date picker, or
7. Click **Today** to return the day planner to today's date, in the appropriate view you selected.
8. Click **Refresh** at the bottom right to reload the My Calendar page reflecting changes, if any.

## Filter by Assigned To

You can select a specific user or users for whom you wish the calendar to display results.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Calendar**.
4. In the *Filter by Assigned To* section, check the box next to the appropriate user name(s).
5. Click **Apply Filter**.

To remove the filter:

1. In the *Filter by Assigned To* section, uncheck the box next to the appropriate user name(s).
2. Click **Apply Filter**.

## Filter by Status

You can select to view calendar results by the status activity status.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Calendar**.
4. In the *Filter by Status* section, check the box next to the appropriate status.
5. Check all that apply.
6. Click **Apply Filter**.

To remove the filter:

1. In the *Filter by Status* section, uncheck the box next to the appropriate status.
2. Check all that apply.
3. Click **Apply Filter**.

## Hide the My Calendar Section of the Dashboard

To hide the date picker in *My Calendar* section of the Call Center Dashboard when not in use, simply click **Hide** in the upper right corner of the date picker. To restore the date picker, click **Show**.

## My Cases

The *My Cases* section of the dashboard provides an overall view of existing cases. You can view, sort, edit or create new cases from this one spot. You can go to, search, sort or edit existing campaigns or create a new campaign from this area. You can also change the layout of the section to suit your needs.

## Getting to the My Cases Section of the Dashboard

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Cases**.

## Go to a Case on the Dashboard

You can jump to any case right from the dashboard.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Cases**.
4. Find the case you wish to go to in the *Existing Cases* section.
5. Click **Go to...** to the left of the case name.

## Search Cases on the Dashboard

You can also search for Cases by using the search filter in the *My Cases* Section.

Note: Filters are not case sensitive.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Cases**.
4. To search by case number, enter the first few digits of the case number you wish to find in the blank field below the Case No. column header. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
5. The filter pulls only those cases that begin with those digits.
6. Click **Go to...** next to the case you wish to view or edit.
7. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Cases on the Dashboard

You can sort cases according to column heading to assist you with interpreting the data.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Cases**.

4. Click the column heading you wish to sort by. The column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

## Change the Layout of the My Cases Section on the Dashboard

You can resize or change the order of the columns in the *My Cases* section to suit your needs and/or preferences.

### Resize Columns of My Cases Section

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Cases**.
4. Hold the cursor over the right edge of the column header you wish to resize.
5. Right-click and hold the mouse button.
6. Drag the column to the left to shorten, to the right to lengthen.
7. Release the mouse button.

### Change Column Order of My Cases Section

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Cases**.
4. Click and hold the column header you wish to move.
5. Drag the column header to the location you wish to move it to.
6. Release the mouse button.
7. Repeat these steps as needed.

## Create a New Case from the Dashboard

You can also create a new case directly from the dashboard.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Cases**.
4. Click **New**.
5. Refer to [Add a New Case](#) in this chapter.

## My Activities Section

The *My Activities* section of the Call Center Dashboard provides an overview of all existing activities in a simple, easy-to-read section. You can go to, search, sort or edit existing activities or create a new activity from this area. You can also change the layout of the section to suit your needs.

## Getting to the My Activities Section of the Dashboard

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Activities**.

## Go to an Activity

You can jump to any activity right from the dashboard.

1. Click **Call Center**.

2. Click **Call Center Dashboard**.
3. Click **My Activities**.
4. Find the activity you wish to go to in the section.
5. Click **Go to...**

## Search Activities on the Dashboard

You can also search for activities by using the search filter in the *My Activities* section.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Activities**.
4. To search by activity number, enter the first few digits of the activity number you wish to find in the blank field below the Activity No. column header. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
5. The filter pulls only those activities that begin with those digits.
6. Click **Go to...** next to the activity you wish to view or edit.
7. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Activities on the Dashboard

You can sort activities according to column heading to assist you with interpreting the data.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Activities**.
4. Click the column heading you wish to sort by. The column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

## Edit an Activity on the Dashboard

Edit an activity directly from the dashboard.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Activities**.
4. Find the activity you wish to edit in the section.
5. Click **Edit** to the right of the activity name.

## Change the layout of the My Activities Section on the Dashboard

You can resize or change the order of the columns in the *My Activities* section to suit your needs and/or preferences.

### Resize Columns of My Activities Section

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Activities**.
4. Hold the cursor over the right edge of the column header you wish to resize.
5. Right-click and hold the mouse button.
6. Drag the column to the left to shorten; to the right to lengthen.

7. Release the mouse button.

### Change Column Order of My Activities Section

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Activities**.
4. Click and hold the column header you wish to move.
5. Drag the column header to the location you wish to move it to.
6. Release the mouse button.
7. Repeat these steps as needed.

### Add a New Activity from the Dashboard

You can also create a new activity directly from the dashboard.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Activities**.
4. Click **New**.
5. Refer to [Add a New Activity](#).

### My Draft Solutions Section

Have a customer question or issue you just solved and need to draft up a quick in-progress solution? The Solutions screen allows you to do just that! Users can quickly draft potential solutions, mark it as in-progress and allow others to search and view this information to be used as a knowledge base. Take it a step further and allow your customers access to this information via their portal and really help them help themselves.

### Getting to the My Draft Solutions Section of the Dashboard

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Draft Solutions**.

### Go to a Solution

You can jump to any solution right from the dashboard.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Draft Solutions**.
4. Find the solution you wish to go to in the section.
5. Click **Go to...**

### Search Solutions on the Dashboard

You can also search for solutions by using the search filter in the *My Draft Solutions* section.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Draft Solutions**.
4. To search by solution number, enter the first few digits of the solution number you wish to find in the blank field below the Solution No. column header. You can do this for any column in the section to search by that



- category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
5. The filter pulls only those solutions that begin with those digits.
  6. Click **Go to...** next to the solution you wish to view or edit.
  7. To remove the search filter, simply click the simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Solutions on the Dashboard

You can sort solutions according to column heading to assist you with interpreting the data.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Draft Solutions**.
4. Click the column heading you wish to sort by. The column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

## Change the layout of the My Draft Solutions Section on the Dashboard

You can resize or change the order of the columns in the *My Draft Solutions* section to suit your needs and/or preferences.

### Resize Columns of My Draft Solutions Section

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Draft Solutions**.
4. Hold the cursor over the right edge of the column header you wish to resize.
5. Right-click and hold the mouse button.
6. Drag the column to the left to shorten; to the right to lengthen.
7. Release the mouse button.

### Change Column Order of My Draft Solutions Section

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Draft Solutions**.
4. Click and hold the column header you wish to move.
5. Drag the column header to the location you wish to move it to.
6. Release the mouse button.
7. Repeat these steps as needed.

## Add a New Solution from the Dashboard

You can also create a new solution directly from the dashboard.

1. Click **Call Center**.
2. Click **Call Center Dashboard**.
3. Click **My Draft Solutions**.
4. Click **New**.
5. Refer to [Add a New Solution](#).

# Cases

## What are Cases?

A Case provides the tools and framework to track and detail any customer troubles. Cases are created when a customer contacts your company with a pressing issue. Cases may be associated to multiple activities to track each incident related to the case.

## Case Types

There are several case types in the Call Center that tailored to the most common cases for most businesses. They are:

- Billing Inquiry
- Complaint
- Feature Request
- Problem
- Question

## Getting to the Cases Tab Link

1. Click **Call Center**.
2. Click **Cases**.

## The Existing Cases Section

The *Existing Cases* section appears at the top of the Cases screen. It allows you to view, search or sort existing cases. You can also change the layout of the section to suit your needs.

## Go to a Case

You can jump to any campaign right from Existing Cases section.

1. Click **Call Center**.
2. Click **Cases**.
3. In the *Existing Cases* section, find the case you wish to go to in the section.
4. Click **Select** to the left of the case name.

## Search Cases

You can also search for cases using the search filter in the *Existing Cases* section.

Note: Filters are not case sensitive.

1. Click **Call Center**.
2. Click **Cases**.
3. To search by case number, enter the first few digits of the case number you wish to find in the blank field below the Case No. column header of the *Existing Cases* section. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
4. The filter pulls only those cases that begin with those digits.
5. You can do this for any column in the section to search by that category.
6. Click **Select** next to the case you wish to view or edit.

7. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Cases

You can sort cases according to column heading to assist you with interpreting the data.

1. Click **Call Center**.
2. Click **Cases**.
3. In the *Existing Cases* section, click the column heading you wish to sort by. The column will sort cases in ascending order. Click the column heading again and the column will sort cases in descending order.

## Change the Layout of the Existing Cases Section

You can resize or change the order of the columns in the *Existing Cases* section to suit your needs and/or preferences.

### Resize Columns of the Existing Cases Section

1. Click **Call Center**.
2. Click **Cases**.
3. In the *Existing Cases* section, hold the cursor over the right edge of the column header you wish to resize.
4. Right-click and hold the mouse button.
5. Drag the column to the left to shorten, to the right to lengthen.
6. Release the mouse button.

### Change Column Order of the Existing Cases Section

1. Click **Sales Center**.
2. Click **Cases**.
3. In the *Existing Cases* section, click and hold the column header you wish to move.
4. Drag the column header to the location you wish to move it to.
5. Release the mouse button.
6. Repeat these steps as needed.

## Hide the Existing Cases Section

To hide the *Existing Cases* section when not in use, simply click **Hide** in the upper right corner. To restore the section, click **Show**.

## Add a New Case

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Clear/New**.
4. Click **Add/Edit Case**.
5. Enter *Subject*.
6. Select *Assigned To* from the dropdown list, or type a user name. (\*Required field)
7. Select *Customer/Vendor* from the dropdown list, or
  - a. Click **'...'** to edit or delete existing customers or vendors or add a new one.

8. Enter *Contact Name*.
9. Enter *Contact Email*.
10. Enter *Contact Phone*.
11. Enter *Closed Date*.
12. Select *Status* from the dropdown list (\*Required field), or
  - a. Click '...' to edit or delete existing case statuses or add a new one.
  - b. Refer to [Add a Case Status](#) in this chapter.
13. Select *Origin* from the dropdown list (\*Required field), or
  - a. Click '...' to edit or delete existing case origins or add a new one.
  - b. Refer to [Add a Case Origin](#) in this chapter.
14. Select *Priority* from the dropdown list, or
  - a. Click '...' to edit or delete existing case priorities or add a new one.
  - b. Refer to [Add a Case Priority](#) in this chapter.
15. Select *Type* from the dropdown list, or
  - a. Click '...' to edit or delete existing case types or add a new one.
  - b. Refer to [Add a Case Type](#) in this chapter.
16. Select *Reason* from the dropdown list, or
  - a. Click '...' to edit or delete existing case reasons or add a new one.
  - b. Refer to [Add a Case Reason](#) in this chapter.
17. Enter *Internal Comments* for reference.
18. Click **Save**.

### Add a Case Status

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Status* field.
5. Click **New**.
6. Enter *Case Status*.
7. Click **Update**.
8. Click **Close**.

### Edit a Case Status

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Status* field.
5. Click **Edit** to the right of the case status you wish to edit.
6. Edit *Case Status* field.
7. Click **Update**.
8. Click **Close**.

### Delete a Case Status

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Status* field.
5. Click **Delete** to the right of the case status you wish to delete.
6. Click **Close**.

### Add a Case Origin

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Origins* field.
5. Click **New**.
6. Enter *Case Origin*.
7. Click **Update**.
8. Click **Close**.

### Edit a Case Origin

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Origin* field.
5. Click **Edit** to the right of the case origin you wish to edit.
6. Edit *Case Origin* field.
7. Click **Update**.
8. Click **Close**.

### Delete a Case Origin

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Origin* field.
5. Click **Delete** to the right of the case origin you wish to delete.
6. Click **Close**.

### Add a Case Priority

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Priority* field.
5. Click **New**.
6. Enter *Case Priority*.
7. Click **Update**.
8. Click **Close**.

### Edit a Case Priority

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Priority* field.
5. Click **Edit** to the right of the case priority you wish to edit.
6. Edit *Case Priority* field.
7. Click **Update**.
8. Click **Close**.

### Delete a Case Priority

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Priority* field.
5. Click **Delete** to the right of the case priority you wish to delete.
6. Click **Close**.

### Add a Case Type

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Type* field.
5. Click **New**.
6. Enter *Case Type*.
7. Click **Update**.
8. Click **Close**.

### Edit a Case Type

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Type* field.
5. Click **Edit** to the right of the case type you wish to edit.
6. Edit *Case Type* field.
7. Click **Update**.
8. Click **Close**.

### Delete a Case Type

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Type* field.
5. Click **Delete** to the right of the case type you wish to delete.
6. Click **Close**.

### Add a Case Reason

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Reason* field.
5. Click **New**.
6. Enter *Case Reason*.
7. Click **Update**.
8. Click **Close**.

### Edit a Case Reason

1. Click **Call Center**.
2. Click **Cases**.

3. Click **Add/Edit Case**.
4. Click '...' in the *Reason* field.
5. Click **Edit** to the right of the case reason you wish to edit.
6. Edit *Case Reason* field.
7. Click **Update**.
8. Click **Close**.

### Delete a Case Reason

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Add/Edit Case**.
4. Click '...' in the *Reason* field.
5. Click **Delete** to the right of the case reason you wish to delete.
6. Click **Close**.

### Edit a Case

1. Click **Call Center**.
2. Click **Cases**.
3. In the *Existing Cases* section, click **Select** next to the case you wish to edit.
4. Click **Add/Edit Case**
5. Edit the information to your specifications.
  - a. Refer to [Add a New Case](#)
6. Click **Save**.
7. Click **Case Description/Add Activity**.
8. Edit the information to your specifications.
  - a. Refer to [Case Description - Add an Activity to a Case](#)
9. Click **Add/Edit Case**.
10. Click **Save**.

### Case Description – Review Previous Comments

After creating a case, you can view previous comments posted by you or any other user to the case. This is a helpful resource when multiple users are working on the same case.

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Case Description/Add Activity**.
4. Click **Select** next to the case for which you wish to view previous comments.
5. Review *Previous Comments* field to view previous comments posted to the case.

### Case Description – Add an Activity to a Case

After creating a case, you can add activities and comments to the case. This is a helpful resource when multiple users are working on the same case.

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Case Description/Add Activity**.
4. Click **Select** next to the case for which you wish to view previous comments.
5. Review *Previous Comments* field to view previous comments posted to the case.

6. Enter *Activity Type* from the dropdown list (\*Required field), or
  - a. Click '...' to edit or delete existing activity types or add a new one.
  - b. Refer to [Add an Activity Type](#)
7. Select *Activity Start Time* using the date picker.
8. Check the *Close Case* box to close the case.
9. Uncheck the *Close Case* box to keep the case open.
10. Check the *Send email using template* box if you intend to send an email using a template.
11. Uncheck the *Send email using template* box if you do not intend to send an email or do not intend to use a template.
12. Select *Email Template* from the dropdown, or
  - a. Click '...' to edit or delete existing email templates or add a new one.
  - b. Refer to [Create an Email Template](#)
13. Enter *Email To*.
14. Enter *Email Subject*.
15. Enter *Comments*.
16. Click **Check Spelling**.
17. Click **Add Activity**.

A record of your entry is now saved to the case. [Refer to Case Description – Review Previous Comments](#) to see how to view the new record.

## Existing Activities for this Case

The *Existing Activities for this Case* section displays all activities associated with a particular campaign. From here you can view, add, edit or delete activities to a campaign, or add new ones. You can also sort the data or change the layout of the section to suit your needs.

## Go to an Activity Related to a Case

You can jump to any activity related to a particular case right from *Existing Activities for this Case* section.

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Existing Activities for this Case**.
4. Find the activity you wish to go to in the section.
5. Click **Go to...** to the left of the opportunity name.

## Search Activities Related to a Case

You can search for activities related to a case by using the search filter in the *Existing Activities for this Case* section. Note: Filters are not case sensitive.

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Existing Activities for this Case**.
4. To search by activity type, enter the first few letters of the activity type you wish to find in the blank field below the Case Type column header of the *Existing Activities for this Case* section. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
5. The filter pulls only those activity types that begin with those letters.
6. Click **Go to...** next to the activity you wish to view or edit.



7. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

### Edit an Activity Related to a Case

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Existing Activities for this Case**.
4. Click **Edit** next to the activity you wish to view or edit.
5. Make any changes to the available fields.
6. Click **Update**.
7. Click **Refresh**.

### Sort Existing Activities for this Case

You can sort the activities for a case by column heading to assist you with interpreting the data.

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Existing Activities for this Case**.
4. Click the column heading you wish to sort by. The column will be sorted in ascending order. Click the column heading again and the column will be sorted in descending order.

### Change the layout of Existing Activities for this Case Section

You can resize or change the order of the columns in the *Existing Activities for this Case* section to suit your needs and/or preferences.

#### Resize Columns of Existing Activities for this Case Section

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Existing Activities for this Case**.
4. Hold the cursor over the right edge of the column header you wish to resize.
5. Right-click and hold the mouse button.
6. Drag the column to the left to shorten; to the right to lengthen.
7. Release the mouse button.

#### Change Column Order of Existing Activities for this Case Section

1. Click **Call Center**.
2. Click **Cases**.
3. Click **Existing Activities for this Case**.
4. Click and hold the column header you wish to move.
5. Drag the column header to the location you wish to move it to.
6. Release the mouse button.
7. Repeat these steps as needed.

## Solutions

### What is a Solution?

A solution is a detailed description of common customer questions or issues, coupled with the appropriate answers or steps to solve the issue.

Solutions can be used by your staff by searching in the Solutions screen and selecting the desired record. They can also be accessed by your customers or vendors through Third Party Portals - helping them answer their own questions before contacting you. Note: you can filter the list of solutions in portals so that they do not see unpublished or internal solutions.

## Solution Types

There's only one type of solution in the Method CRM template – Published. Published solutions are those that have been finalized and can be viewed by your customers in the Customer Portal. It's important to note that there are different stages of solutions – Draft and Published. The solution stage will help you manage the level of completeness of a solution once you begin growing your existing solutions bank!

## Getting to the Solutions Tab Link

1. Click **Call Center**.
2. Click **Solutions**.

## The Existing Solutions Section

The *Existing Solutions* section appears at the top of the Solutions screen. It allows you to view, search or sort existing solutions. You can also change the layout of the section to suit your needs.

## Go to a Solution

You can jump to any solution right from *Existing Solutions* section.

1. Click **Call Center**.
2. Click **Solutions**.
3. In the *Existing Solutions* section, find the solution you wish to go to in the section.
4. Click **Select** to the left of the solution name.

## Search Solutions

You can also search for solutions by using the search filter in the *Existing Solutions* section. Note: Filters are not case sensitive.

1. Click **Call Center**.
2. Click **Solutions**.
3. To search by the Solution Body, enter the first few letters of the Solution's you wish to find in the blank field below the Solution Body column header of the *Existing Solutions* section. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
4. The filter pulls only those solutions that begin with those letters.
5. Click **Select** next to the solution you wish to view or edit.
6. To remove the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Sort Solutions

You can sort solutions according to column heading to assist you with interpreting the data.

1. Click **Sales Center**.
2. Click **Solutions**.
3. In the *Existing Solutions* section, click the column heading you wish to sort by. The column will sort solutions in ascending order. Click the column heading again and the column will sort solutions in descending order.

## Change the Layout of the Existing Solutions Section

You can resize or change the order of the columns in the *Existing Solutions* section to suit your needs and/or preferences.

### Resize Columns of the Existing Solutions Section

1. Click **Call Center**.
2. Click **Solutions**.
3. In the *Existing Solutions* section, hold the cursor over the right edge of the column header you wish to resize.
4. Right-click and hold the mouse button.
5. Drag the column to the left to shorten, to the right to lengthen.
6. Release the mouse button.

### Change Column Order of the Existing Solutions Section

1. Click **Call Center**.
2. Click **Solutions**.
3. In the *Existing Solutions* section, click and hold the column header you wish to move.
4. Drag the column header to the location you wish to move it to.
5. Release the mouse button and the column moves to the new destination.
6. Repeat these steps as needed.

## Hide the Existing Solutions Section

To hide the *Existing Solutions* section when not in use, simply click **Hide** in the upper right corner. To restore the section, click **Show**.

## Add a New Solution

1. Click **Call Center**.
2. Click **Solutions**.
3. Click **Clear/New** in the *Add/Edit Solution* section.
4. Enter *Title*. (\*Required field)
5. Select *Assigned To* from the dropdown list, or type a user name. (\*Required field)
6. Select *Status* from the dropdown list (\*Required field), or
  - a. Click **'...'** to edit or delete an existing solution status or add a new one.
  - b. Refer to [Add a Solution Status](#)
7. Select *Type* from the dropdown list (\*Required field), or
  - a. Click **'...'** to edit or delete an existing solution type or add a new one.
  - b. Refer to the [Add a Solution Type](#) section in this chapter
8. Check the *For internal use only* box to keep solution internal.
9. Uncheck the *For internal use only* box to open the solution to external users.
10. Enter *Solution Body*.

- a. The text you enter here will compose the body of the solution, be sure to utilize the Design, HTML and Preview buttons at the bottom of this section.
11. Click **Spell Check**.
12. Click **Save**.

### Add a Solution Status

1. Click **Call Center**.
2. Click **Solutions**.
3. Click '...' in the *Status* field.
4. Click **New**.
5. Enter *Solution Status*.
6. Click **Update**.
7. Click **Close**.

### Edit a Solution Status

1. Click **Call Center**.
2. Click **Solutions**.
3. Click '...' in the *Status* field.
4. Click **Edit** to the right of the stage you wish to edit.
5. Edit *Solution Status* field.
6. Click **Update**.
7. Click **Close**.

### Delete a Solution Status

1. Click **Call Center**.
2. Click **Solutions**.
3. Click '...' in the *Status* field.
4. Click **Delete** to the left of the stage you wish to delete.
5. Click **Close**.

### Add a Solution Type

1. Click **Call Center**.
2. Click **Solutions**.
3. Click '...' in the *Type* field.
4. Click **New**.
5. Enter *Solution Type*.
6. Click **Update**.
7. Click **Close**.

### Edit a Solution Type

1. Click **Call Center**.
2. Click **Solutions**.
3. Click '...' in the *Type* field.
4. Click **Edit** to the right of the type you wish to edit.
5. Edit *Solution Type* field.
6. Click **Update**.
7. Click **Close**.

## Delete a Solution Type

1. Click **Call Center**.
2. Click **Solutions**.
3. Click '...' in the *Type* field.
4. Click **Delete** to the right of the stage you wish to delete.
5. Click **Close**.

## Edit a Solution

1. Click **Call Center**.
2. Click **Solutions**.
3. Click **Select** next to the solution you wish to edit in the *Existing Solutions* section.
4. Edit the information to your specifications.
  - a. Refer to [Add a New Solution](#)
5. Click **Save**.

# Customer Portal

These days your customers demand more from you than ever. Not only do they want more, but they want it NOW! Meet and exceed the needs and wants of your customers by offering online access to their accounts via the Customer Portal. In today's fast paced environment, online account access is no longer just a nice thing to have; it's a necessity to be competitive. Likewise, it allows your customers to find answers to common questions themselves, to access their account balances from anywhere at any time or view their transaction history to reconcile their own accounts. With the Customer Portal, your customers can take charge of their own account, leaving you with more time to manage new business innovations.

## Initial Setup for Customer Portal

Getting your customers setup to start using the Customer Portal requires some initial work on your part. After setup, you'll be able to display a portal on your website that grants customer access. Setup is a three-step process of including the Customer Portal on your website, creating login info for your customers, and then notifying your customers that online account access is available.

### Include the Customer Portal on your Website

1. Click **Customize**.
2. Click **Third Party Portal**.
3. Look for the portal called *CRM\_Customer\_Portal* and click **Show HTML**.
4. If you wish to preview how the portal will look, click **Show Test Page**, otherwise skip to step 5.
5. Click **Copy to Clipboard**.
6. Click **Finish**.
7. Paste the html code into a new or existing page on your website.

### Select Tabs for Customers to View in the Customer Portal

When a customer signs-in to the Customer Portal, they will see only specific tabs for which you've granted access. You do this to limit the access that customers have to valuable and confidential data within your database.

To select which tabs you'd like your customers to see after sign-in, follow these steps:

1. Click **Customize**.
2. Click **Third Party Portal**.
3. Look for the portal called *CRM\_Customer\_Portal* and click **Edit**.
4. Review Step 1 "General properties" and click **Next**.
5. Choose which tab will be accessible after sign-in and click **Next**.
6. Choose either *Show default* or *Hidden* and click **Next**.
7. Review Step 4 "Retrieve Password Email Template" and click **Next**.
8. Review Step 5 "Registration Email Template" and click **Next**.
9. If you wish to preview how the portal will look, click **Show Test Page**, otherwise skip to step 10.
10. Click **Copy to Clipboard**.
11. Click **Finish**.
12. Paste the html code into a new or existing page on your website.

## Open the Customer Portal

To access the Customer Portal as the Method administrator, click the **Customer Portal** tab at the top of the Home screen. It's that easy! You are taken right to the Customer Portal.

### Customer Registration for Online Account Access

If your customer has an account with you, and would like to create a User Name and register for online account access, they can enter their email and desired User Name and a password will be sent.

1. Go to the Customer's Portal sign-in page.
2. Click **Register**.
3. Assign yourself an *Email* and *Desired User Name*.
4. Click **Submit**.

### Manually Create & Notify Customer of Login Info

Note: manually creating the customer ID and password is not normal practice.

1. Click **Customer Center**.
2. Click **Customer List**.
3. Click **Select** next to the customer you wish to include in the portal.
4. Click **Additional Info**.
5. Enter *Portal UserName*.
  - a. *This is a user name you create for your customer to use when he/she logs in*
6. Enter *Portal Password*.
  - a. *This is the password your customer will use to login*
7. Click **Transactions/Activities**.
8. Click **New Activity**.
9. Refer to [Send an Email](#).

## Customer Portal Home

### What is the Customer Portal Home?

The Home screen of the Customer Portal provides quick, relevant access to the most up-to-date account information; but this time the info is not for you, it's for your customers! Now your customers can access their account information anytime and anywhere without having to call or email you.

Customers who take advantage of the Customer Portal will gain access to a self-service approach to viewing their most commonly requested account information, such as Balance and [Most Recent Transactions](#). They can update their own profiles in the [My Profile](#) section, so you will stay up-to-date with new phone numbers, email or shipping addresses. It doesn't stop there! There's even an area that allows them to ask a question and answers can be stored as solutions for other customers to view.

## Getting the Most Out of the Customer Portal Home

The Customer Portal Home is essentially a dashboard of account information your customers can view 24 hours a day, 7 days a week. It is divided into 4 main sections – Account Balance/Most Recent Transactions, Recent Questions, Profile and Contact Us.

### Account Balance/Most Recent Transactions

The *Account Balance/Most Recent Transactions* section displays a customer's real time account balance and shows a summary of the three most recent transactions posted to the customer's account. Your customer would simply click **Go to Recent Transactions** in the *Account Balance/Most Recent Transactions* section to view all their transactions.

### Change the Layout of the Most Recent Transactions Section

You can resize or change the order of the columns in the section to suit your needs and/or preferences.

#### Resize Columns of Most Recent Transactions Section

1. Hold the cursor over the right edge of the column header you wish to resize.
2. Click and hold the mouse button.
3. Drag the column to the left to shorten; to the right to lengthen.
4. Release the mouse button.

#### Change Column Order of Most Recent Transactions Section

1. Click and hold the column header you wish to move.
2. Drag the column header to the location you wish to move it to.
3. Release the mouse button and the column moves to the new destination.
4. Repeat these steps as needed.

### Recent Questions Section

The *Recent Questions* section displays a summary of the three most recent questions that your customer asked. Your customer would simply click **Go to Questions** in the *Recent Questions* section to view all questions they've asked.

### Change the layout of the Recent Questions Section

You can resize or change the order of the columns in the section to suit your needs and/or preferences.

#### Resize Columns of Recent Questions Section

1. Hold the cursor over the right edge of the column header you wish to resize.
2. Click and hold the mouse button.
3. Drag the column to the left to shorten; to the right to lengthen.
4. Release the mouse button.

#### Change Column Order of Recent Questions Section

1. Click and hold the column header you wish to move.
2. Drag the column header to the location you wish to move it to.



3. Release the mouse button and the column moves to the new destination.
4. Repeat these steps as needed.

## Profile Section

The *Profile* section displays the current profile information your company has on file for your customer. The customer can make changes and update this data for you, in real time. Your customer would simply click **Edit Profile** in the *Profile* section to update his/her profile information.

## Contact Us Section

The *Contact Us* section a simple point of reference for the customer to view your company's contact information. Customers can also submit their questions directly from the Contact Us section for convenience. Your customer would simply click **Ask a Question** in the *Contact* section to ask you a new question.

## Recent Transactions

The Recent Transactions tab link provides customers with a summary of all recent transactions and unpaid invoices in a simple, table format. They can review individual transaction details or use the valuable print preview feature. Customers can sort these transactions or change the layout of the table in this section as desired.

### Getting to the All Recent Transactions Table

1. After customer account sign-in.
2. Click **Recent Transactions**.
3. Click **All Recent Transactions**.

### Search All Recent Transactions

You can also search for recent transactions by using the search filter in the *All Recent Transactions* section.

1. To search by transaction *Type*, enter the first few letters of the transaction type you wish to find. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
2. The filter pulls only those transactions whose type begins with those letters.
3. To clear the filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

### Sort All Recent Transactions

You can sort recent transactions according to column heading to assist you with interpreting the data.

1. Click once on the column heading you wish to sort by. The column will sort transactions in ascending order. Click the column heading again and the column will sort transactions in descending order.

## Change the layout of the All Recent Transactions Section

You can resize or change the order of the columns in the *All Recent Transactions* section to suit your needs and/or preferences.

### Resize Columns of All Recent Transactions Section

1. Hold the cursor over the right edge of the column header you wish to resize.
2. Click and hold the mouse button.
3. Drag the column to the left to shorten; to the right to lengthen.
4. Release the mouse button.

### Change Column Order of All Recent Transactions Section

1. Click and hold the column header you wish to move.
2. Drag the column header to the location you wish to move it to.
3. Release the mouse button.
4. Repeat these steps as needed.

## Unpaid Invoices

### Getting to the Unpaid Invoices Table

1. After customer account sign-in.
2. Click **Recent Transactions**.
3. Click **Unpaid Invoices**.

### Search Unpaid Invoices

You can also search for unpaid invoices by using the search filter in the *Unpaid Invoices* section.

1. To search by invoice reference number enter the first few digits of the invoice reference number (*Ref No.*) you wish to find. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
2. The filter pulls only those invoices with those digits.
3. Click **Print Preview** next to the invoice you wish to view.
4. To clear the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

### Sort Unpaid Invoices

You can sort unpaid invoices by column heading to assist you with interpreting the data.

1. Click once on the column heading you wish to sort by. The column will sort invoices in ascending order. Click the column heading again and the column will sort invoices in descending order.

## Change the layout of the Unpaid Invoices Section

You can resize or change the order of the columns in the *Unpaid Invoices* section to suit your needs and/or preferences.

### Resize Columns of the Unpaid Invoices Section

1. Hold the cursor over the right edge of the column header you wish to resize.

2. Click and hold the mouse button.
3. Drag the column to the left to shorten; to the right to lengthen.
4. Release the mouse button.

### Change Column Order of the Unpaid Invoices Section

1. Click and hold the column header you wish to move.
2. Drag the column header to the location you wish to move it to.
3. Release the mouse button.
4. Repeat these steps as needed.

## Ask a Question

Every now and then, there comes a time when one of your customers may find themselves in a tough situation and require some form of assistance. By enabling the Ask a Question tab-link you can provide your customers with a way for them to answer some of their own questions. Frequently Asked Questions sections (also known as FAQ's) are powerful tools on websites. With the Ask a Question tab-link, your customers will see the questions they've asked, be able to ask a new question, or view solutions to previous questions.

### Search Existing Solutions Section

Customers can filter the list of existing solutions to see if their question has already been asked and responded to previously.

### Getting to the Existing Solutions Section

1. After customer account sign-in.
2. Click **Ask a Question**.
3. Click **Search Existing Solutions**.

### Search Existing Solutions

It is recommended that your customers search for existing solutions prior to asking their question - an answer may already exist. Customers can search for existing solutions by using the search filter in the *Existing Solutions* table.

1. To search solutions by title, enter the key words of the title you wish to find.
2. The filter pulls only those solutions that contain the key words you entered.
3. You can do this for any column in the table to search by that category or use the dropdown lists provided.
4. Click **Select** next to the solution.
5. Details of the solution are provided in the screen below.
6. If desired, customers can email a copy of this solution to themselves or colleagues.
  - a. Enter *Email this to* address.
  - b. Click **Email**.

Note: Although solutions are accessible from the Customer Portal, they are actually housed in the Call Center. Therefore, solutions marked as "for internal use only" will not show in the Customer Portal. Refer to [Add a New Solution](#).

## Sort Existing Solutions

You can sort existing solutions by column heading to assist you with interpreting the data.

1. Click once on the column heading you wish to sort. The column will sort solutions in ascending order. Click the column heading again and the column will sort solutions in descending order.

## Change the Layout of the Existing Solutions Section

You can resize or change the order of the columns in the section to suit your needs and/or preferences.

### Resize Columns of the Existing Solutions Section

1. Hold the cursor over the right edge of the column header you wish to resize.
2. Click and hold the mouse button.
3. Drag the column to the left to shorten; to the right to lengthen.
4. Release the mouse button.

### Change Column Order of the Existing Solutions Section

1. Click and hold the column header you wish to move.
2. Drag the column header to the location you wish to move it to.
3. Release the mouse button.
4. Repeat these steps as needed.

## My Existing Questions

Customers can filter the list of existing questions to see if their question has already been asked and responded to previously.

## Getting to the My Existing Questions Section

1. After customer account sign-in.
2. Click **Ask a Question**.
3. Click **My Existing Questions**.

## Search My Existing Questions

It is recommended that your customers review existing questions prior to asking a new question.

1. To search questions by subject, enter the key words of the question's subject that you wish to find.
2. The filter pulls only those existing questions that contain the key words you entered.
3. You can do this for any column in the table to search by that category or use the dropdown lists provided. You can do this for any column in the section to search by that category, or select from the dropdown list by clicking the **Filter** icon (key-shaped icon).
4. Click **Select** next to the question for which you wish to view full details.
5. Details of the question are displayed below.
6. To clear the search filter, simply click the **Clear Filter** icon (key with a red 'x' through it) to the far left of the search row.

## Add comments/Responses to Existing Questions

Customers may choose to add a comment, pose a follow up question or respond to an existing question within an active case.

1. After customer account sign-in.
2. Click **Ask A Question**.
3. Click **My Existing Questions**.
4. Click **Select** next to the question for which you wish to add a comment or response.
5. Fill the *Keep Open and Add Response* button.
6. Enter the text of your comment or response in the area provided. Be sure to utilize the Design, HTML and Preview buttons at the bottom of this section.
7. Click **Submit Update**.
8. The case number is updated with the new comments and an email is sent to the email address on file for the author confirming the details of these actions.

Note: Although existing questions are accessible from the Customer Portal, they are actually housed in the Call Center as Cases. Refer to [Cases](#) for additional information.

## Sort My Existing Questions

You can sort existing questions by column heading to assist you with interpreting the data.

1. Click once on the column heading you wish to sort. The column will sort questions in ascending order. Click the column heading again and the column will sort questions in descending order.

## Change the layout of the My Existing Questions Section

You can resize or change the order of the columns in the section to suit your needs and/or preferences.

### Resize Columns of the My Existing Questions Section

1. Hold the cursor over the right edge of the column header you wish to resize.
2. Click and hold the mouse button.
3. Drag the column to the left to shorten; to the right to lengthen.
4. Release the mouse button.

### Change Column Order of the My Existing Questions Table

1. Click and hold the column header you wish to move.
2. Drag the column header to the location you wish to move it to .
3. Release the mouse button.
4. Repeat these steps as needed.

## Ask a New Question

There will be times when customers will have questions for which there are no existing solutions, especially when you first set up the Customer Portal. This is when your customer would simply ask his/her question, generating a new case. As your customers begin to ask more questions, your bank of questions and solutions will

grow, eventually incorporating the most commonly asked questions right there in one, central location.

### Getting to Ask a New Question

1. After customer account sign-in.
2. Click **Ask a Question**.
3. Click **Ask a New Question**.

### Ask a New Question

We've made the task of asking questions and getting that new case started easy and painless. This way, your customers are more apt to use this option rather than picking up the phone to ask their question directly.

1. After customer account sign-in.
2. Click **Ask a Question**.
3. Click **Ask a New Question**.
4. Enter *Type of Question* or select from the dropdown list. (\*Required field)
5. Enter *Contact Name*. (\*Required field)
6. Enter *Contact Phone*.
7. Enter *Contact Email*. (\*Required field)
8. Enter *Subject*. (\*Required field)
9. Enter the text of the question in the area provided. Be sure to utilize the Design, HTML and Preview buttons at the bottom of this section.
10. Click **Submit Question**.
11. A message box appears indicating your customer's question has been submitted along with the new Case No.
12. Click **Close**.

Note: Your customer will receive an auto-generated email confirmation thanking them for using the self-service "Ask a Question" form. This email also contains the details of their question for reference.

Although questions are accessible from the Customer Portal, they are actually housed in the Call Center as Cases. Refer to [Cases](#) for additional information.

## My Profile

The *My Profile* section is where your customers can view their contact information and make changes or updates as needed. They have the ability to review, modify and save all the contact information that is on file.

### Contact & Address Info

Customers can view their basic contact information on this screen, as well as make modifications.

### Getting to the Contact & Address Info

1. After customer account sign-in.
2. Click **My Profile**.
3. Click **Contact & Address Info**.

## Updating Contact & Address Info

1. After customer account sign-in.
2. Click **My Profile**.
3. Click **Contact & Address Info**.
4. Edit the appropriate information as desired.
5. Click **Save**.

Note: Your customer will receive an auto-generated email confirming that the changes have been made.

## Additional Info

Customers can view their additional account information on this screen, such as credit limit and preferred method of payment. This screen is populated with customer information stored in the Customer Center, therefore, the majority of information contained on this screen is for their reference only. They cannot change most of the information contained on this screen, except for their preferred payment method and portal password.

## Getting to Additional Info

1. After customer account sign-in.
2. Click **My Profile**.
3. Click **Additional Info**.

## Updating the Additional Info

1. After customer account sign-in.
2. Click **My Profile**.
3. Click **Additional Info**.
4. Review additional account information.
5. Customers can edit preferred method of payment and portal password.
6. Click **Contact & Address Info**.
7. Click **Save**.

Note: Your customer will receive an auto-generated email confirming that the changes have been made.

## Sign Out

The Sign Out tab allows customers to securely sign out of the Customer Portal, ending the session and deactivating access to confidential account information.

## Getting to Sign Out

1. After customer account sign-in.
2. Click **Sign Out**.
3. Customers are returned to the Account Sign-In page.
4. To start the session again, simply sign-in with your User Name and Password

Note: This feature is only available from the Customer Portal once a customer has securely signed in.