

# V6.09 Training Manual

# Client Relationship Management





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# Find the freedom to focus on what matters with Nimbus

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**Client Relationship Management** 

### **Document Information**

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QA	
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## **Client Relationship Management**

The Client Relationship Management (CRM) report appears in the Banner menu:



#### Containing all the relevant client information and relationships in one report:

CRM Co Filter :	ntacts : All No Filter	Orga	nisations and the Peopl	e associated wi	th them					
	fresh Report		Print 🔻 🛋 Export 🔻	😼 Clear Sort	Gear Filters	ave Report	Setting	Clear	Report S	ettings
First Name	Last Name	P	Job Title	▲ Organisa	tion	PO Box	City	In	Log Work	Log Call
new				A1 Concrete Adam Land	e Pumping Ltd	PO Box 2285	Nelson		Both	ORG
new				ADC Interna Allen Motors	ational s Ltd	1327 Broadway PO Box 64	New York Nelson		Client Client	ORG ORG

As can be seen there is a many to many relationships; there are more than one persons attached to the client Automotive Electrical. The report contains information relevant to both the organisation and the person.

First Name	Last Name	P	Job Title	▲ Organisation	PO Box	City	In	Log Work	Log Call	Rating	Org Hi	<b>C</b>	U	Call Hi
new				Andria					ORG					
Gary	Pearson		Sales	Automotive Electrical	PO Box 567	Nelson	1	Client	CRM	Gold	4			2
Phil	McCain		Accounts	Automotive Electrical	PO Box 567	Nelson	2	Client	CRM	Gold	4			
Gary	Brockins		Chief Executive Officer	Automotive Electrical	PO Box 567	Nelson	0	Client	CRM	Gold	4			
William	Smith		Manager	Automotive Electrical	PO Box 567	Nelson	2	Client	CRM	Gold	4			1
Mark	Haversha		Engineering Manager	Automotive Electrical	PO Box 567	Nelson	0	Client	CRM	Gold	4			
new				Baily & Sons Ltd	Box 123	Gore		Client	ORG	Gold				
Baldy	Baldrick		Manager	Baldrick Plumbers	PO Box 4563	Auckland	0	Client	CRM		1			

#### The column called Ints is an abbreviation for Interests



This is where you can note any interests that the person may have - useful for marketing.



#### Clicking on the First name opens this edit form:

0	resh Report	Print 🔻 🔣 Expo	ort 🔻 😼 Clear	Sort 🥳 Clear Filters 🔚	Save Report Setting	Clear Report	Settings	•	
First Name	Last Name	PSM Job Title		Organisation	PO Box	City	Ints	Log Work	Log Ca
iew				A1 Concrete Pumping Ltd	PO Box 2285	Nelson		Both	ORG
ew				Adam Langbridge	54 Mount St.	Nelson		Supplier	ORG
ew				ADC International	1327 Broadway	New York		Client	ORG
ew				Amit Prakash					ORG
ew				Andria					ORG
hil	McCain	Accounts		Automotive Electrical	PO Box 567	Nelson	2	Client	CRM
ary	Brockinshire	Chief Executiv	e Officer	Automotive Electrical	PO Box 567	Nelson	0	Client	CRM
/illiam	Smith	CRM Contacts	- NimbusNIMLP	50 - Edit - Google Chrome			-		$\times$
lark	Haversham	() localhost/N	limbusNIMLP6	0/WebEditor/ViewForm	.aspx?FormName=0	RMContacts8	Looku	pField=0	e
hil	McCain		-						
aldy	Baldrick	People at Work	Work Address	Organisation Details					
und y	Duranter								
ew				100					
/endy	Smith	Short Name	AutoElec	00		Personal Details	6		
ev	Blight	Organisation	Automotive Elec	trical	Initials				
arry	Potter								_
		Derson		(8)	First Name	Cast			
		Forson	Brockinshire, Ga	ry 🛃 🦓	T HOLTHOMIC	Gary			
anne	Millan	Person	Brockinshire, Ga	ry 💏 🙀	Last Name	Brockinshire			
oanne ew	Millan	Job Title	Chief Executive	ry 🦛 🙀 Officer	Last Name Person Notes	Brockinshire			
ew aren	Millan	Job Title	Chief Executive	Officer	Last Name Person Notes	Brockinshire			
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oanne ew aren ew	Millan Miller	Job Title Work Notes	Chief Executive	ry Million and Configuration	Last Name Person Notes	Brockinshire			
ew ew aren ew ew	Millan Miller	Job Title Work Notes	Chief Executive	ry Million And	Last Name Person Notes	Brockinshire			
ew ew aren ew ew	Millan Miller	Job Title Work Notes Work Mobile	Chief Executive	Dfficer	Last Name Person Notes Personal Mobile	Brockinshire			
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ew aren ew ew ew ew ew	Millan Miller	Job Title Work Notes Work Mobile Work Email	Chief Executive	Officer	Last Name Person Notes Personal Mobile Personal Email Social Media	Brockinshire			
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ew ew ew ew ew ew ew ew ew ew ew ew ew	Millan Miller Delaware	Job Title Work Notes Work Mobile Work Email Work DDI	Chief Executive	officer	Last Name Person Notes Personal Mobile Personal Email Social Media Person Index Person Closed	Brockinshire Brockinshire,Gary			
ew aren ew ew ew ew ew ew ew ew ew ew	Millan Miller Delaware	Job Title Work Notes Work Mobile Work Email Work DDI	Chief Executive	ry Milli	Last Name Person Notes Personal Mobile Personal Email Social Media Person Index Person Closed	Brockinshire Brockinshire,Gary			
aren aren aw aw aw aw aw aw aw aw aw aw aw aw	Millan Miller Delaware	Job Title Work Notes Work Mobile Work Email Work DDI	Chief Executive Chief Executive C217767833 Qary@autoelecs O3 4548383 Changing Job New Emp	ry Milli V	Last Name Person Notes Personal Mobile Personal Email Social Media Person Index Person Closed	Brockinshire Brockinshire,Gary U	nsubscril	be All	

Which allows you to edit the persons details, including changing the organisation they belong to, or adding a new person to that organisation (by clicking on the 📓 icon), etc

The header links allow you to create new organisations and people

New Organisation People									
People									
CRM People : Listing Filter : No Filter	g of person de	tails recorded	in the CRM system						
O Refresh Report	Print 🔻	KExport V	Clear Sort B Cl	ear Filters 🛛 🕁 Save Report	Setting 🔚 Clear Report	t Settings			
▲ Person Index	Title	Initials	First Name	Last Name	Mobile	Email	Unsub All	Closed	Interests
Baldrick,Baldy			Baldy	Baldrick			0	0	
Blight,Trev			Trev	Blight			0	0	Cycling
Brockinshire, Gary			Gary	Brockinshire			0	0	
Delaware, Andrew	Mr	A	Andrew	Delaware			0	0	Sailing



#### The header links from the CRM People report



#### Allow you to add new people, job titles and interests:



Note that you can access the Logging Jobs report and Call log from the CRM report and also initiate and email:

∟og Work	Log Call	Rating	Org Hi	<b>C</b>	U	Call Hi	Phone	Shortname	Mobile	Old	Notes	Contact Manager	Email

The Call Log defaults all the relevant fields for you:

erson Index	Baldrick,Baldy	<b>#</b> }	Email	Job Title	Manager		#
rganisation	Baldrick	<i>8</i> 8 🙀					
all Details	Work Details Orga	nisation Details					
			Call Notes				
all Owner		~					
egarding							
all Type		~					
all Category	CRMCall Genera	al catchup Ca 🗸					
ction Date		<b>1</b>					
			Links of Links				
ogged By		<u>#</u>	Linked Job	Respon	ded		<u>8</u> 8
	16-Sep-2022 10:00	<b>S</b>			Cal	I Closed	
ogged At			New Prospect	Closed	At		6.3
ogged At				010000			