V6.09 Training Manual

Client Relationship Management

Find the freedom to focus on what matters with Nimbus
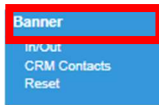
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Document Information

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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:

First Name	Last Name	P...	Job Title	▲ Organisation	PO Box	City	In...	Log Work	Log Call
new				A1 Concrete Pumping Ltd	PO Box 2285	Nelson		Both	ORG
new				Adam Langbridge	54 Mount St.	Nelson		Suppl...	ORG
new				ADC International	1327 Broadway	New York		Client	ORG
new				Allen Motors Ltd	PO Box 64	Nelson		Client	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.
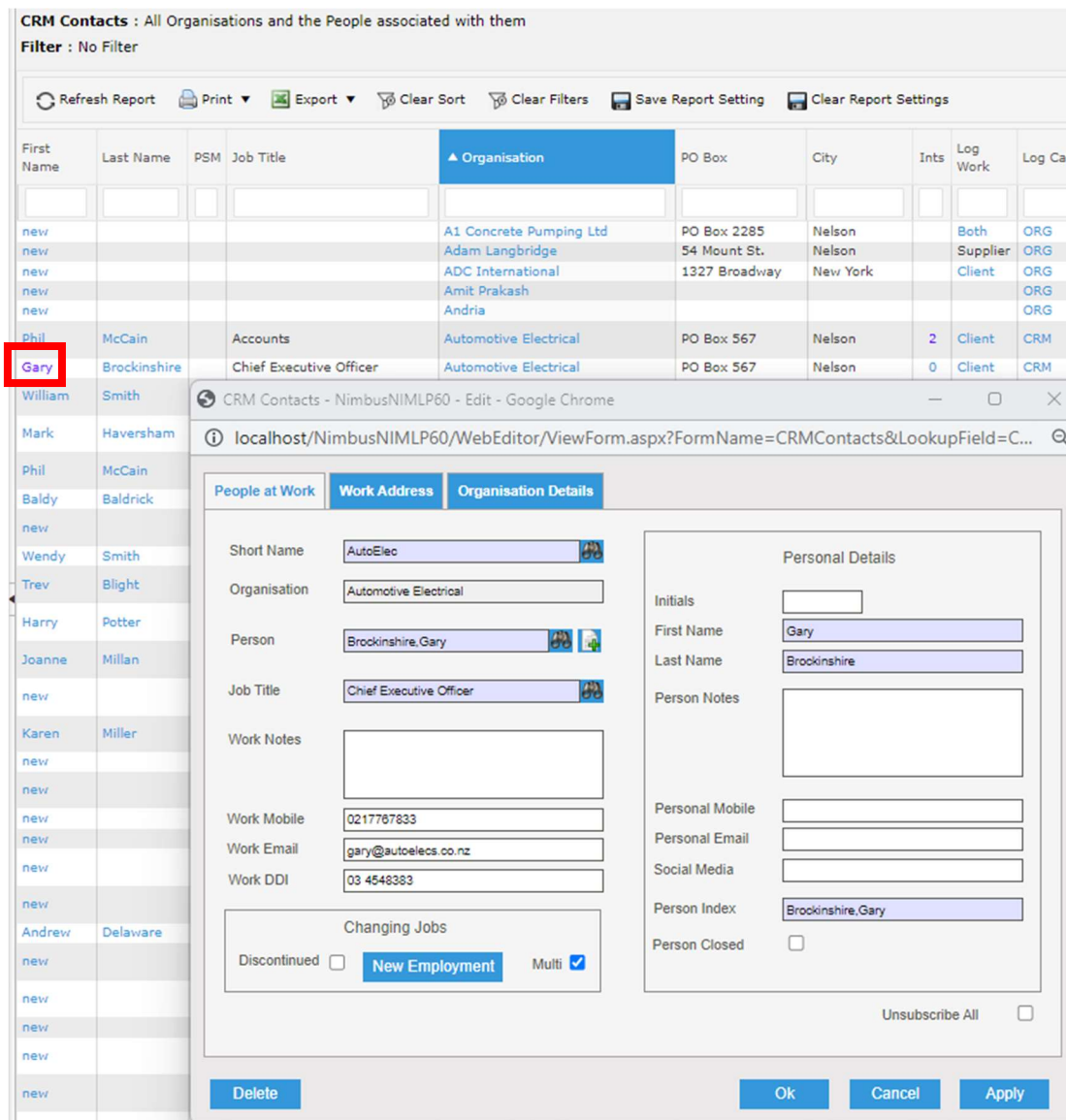
First Name	Last Name	P...	Job Title	▲ Organisation	PO Box	City	In...	Log Work	Log Call	Rating	Org Hi...	C...	U...	Call Hi...
new				Andria					ORG					
Gary	Pearson		Sales	Automotive Electrical	PO Box 567	Nelson	1	Client	CRM	Gold	4			2
Phil	McCain		Accounts	Automotive Electrical	PO Box 567	Nelson	2	Client	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
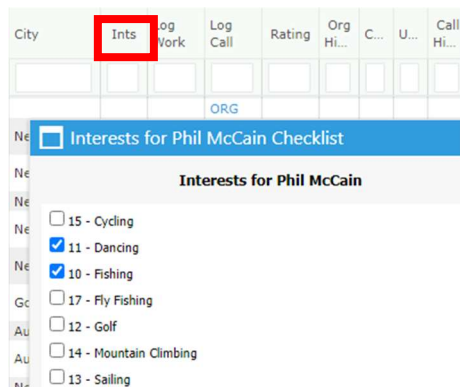
This is where you can note any interests that the person may have – useful for marketing.

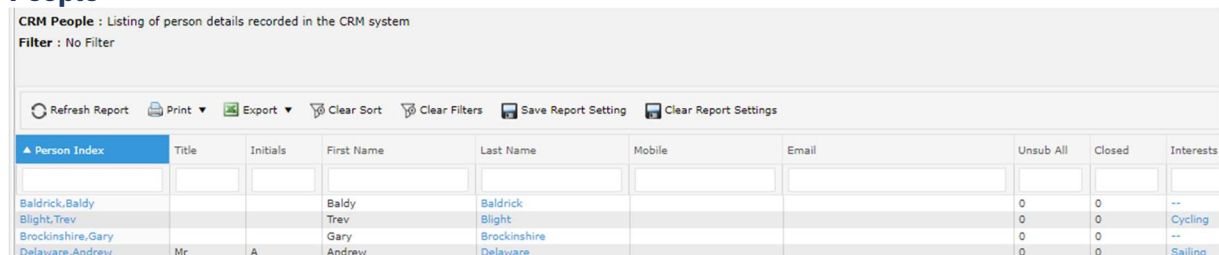Clicking on the First name opens this edit form:

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

People

The header links from the CRM People report

Allow you to add new people, job titles and interests:
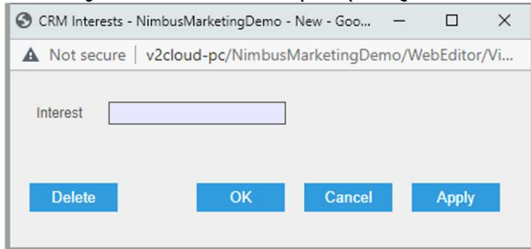
Note that you can access the Logging Jobs report and Call log from the CRM report and also initiate and email:

The Call Log defaults all the relevant fields for you: