



V6.09 Training Manual



Client Relationship Management



Find the freedom to focus on what matters with Nimbus

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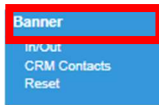
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Document Information

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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 Contacts : All Organisations and the People associated with them
Filter : No Filter

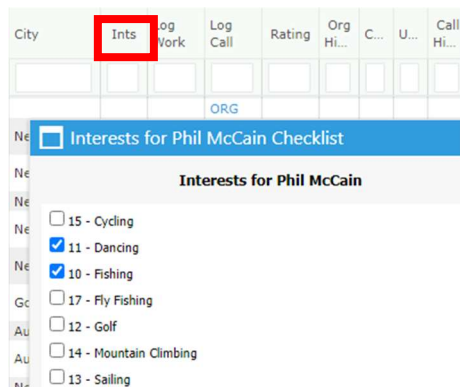
Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

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.

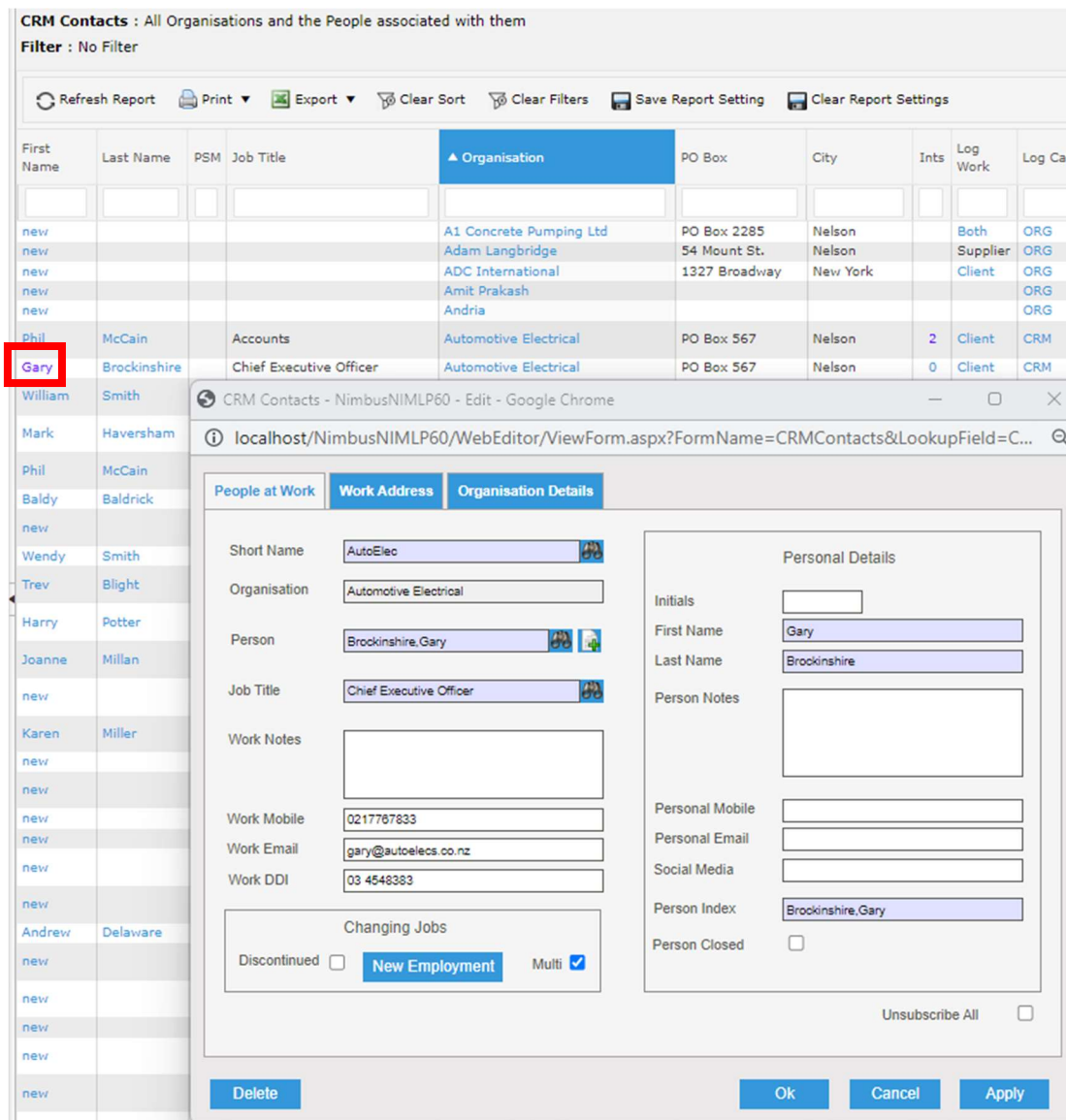
First Name	Last Name	P...	Job Title	▲ Organisation	PO Box	City	In...	Log Work	Log Call	Rating	Org Hi...	C...	U...	Call Hi...
new				Andria						ORG				
Gary	Pearson		Sales	Automotive Electrical	PO Box 567	Nelson	1	Client	CRM	Gold	4			2
Phil	McCain		Accounts	Automotive Electrical	PO Box 567	Nelson	2	Client	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:




The screenshot shows the CRM Contacts interface. At the top, it says "CRM Contacts : All Organisations and the People associated with them" and "Filter : No Filter". Below this are several action buttons: Refresh Report, Print, Export, Clear Sort, Clear Filters, Save Report Setting, and Clear Report Settings.

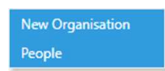
The main table has columns: First Name, Last Name, PSM, Job Title, Organisation, PO Box, City, Ints, Log Work, and Log Call. The row for Gary Brockinshire is highlighted with a red box. The edit form for Gary Brockinshire is open, showing the following details:

- Short Name: AutoElec
- Organisation: Automotive Electrical
- Person: Brockinshire, Gary
- Job Title: Chief Executive Officer
- Work Notes: (empty text area)
- Work Mobile: 0217767833
- Work Email: gary@autoelecs.co.nz
- Work DDI: 03 4548383
- Personal Details:
 - Initials: (empty)
 - First Name: Gary
 - Last Name: Brockinshire
 - Person Notes: (empty text area)
 - Personal Mobile: (empty)
 - Personal Email: (empty)
 - Social Media: (empty)
 - Person Index: Brockinshire, Gary
 - Person Closed:
- Changing Jobs:
 - Discontinued:
 - New Employment:
 - Multi:

At the bottom of the form are buttons for Delete, Ok, Cancel, and Apply.

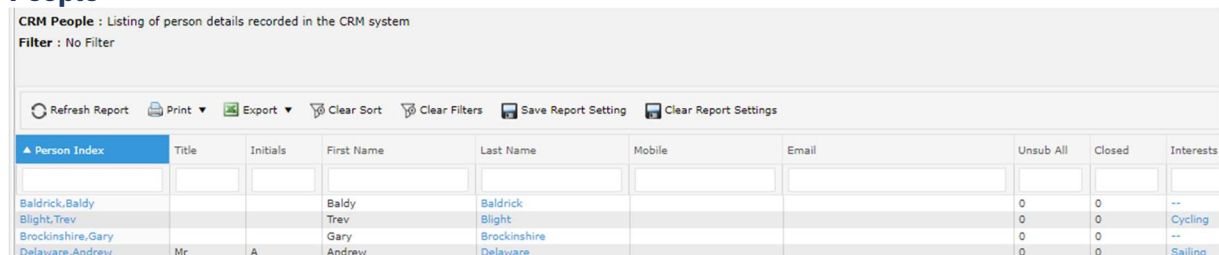
Which allows you to edit the persons details, including changing the organisation they belong to, or adding a new person to that organisation (by clicking on the  icon), etc

The header links allow you to create new organisations and people



Two blue buttons are shown: "New Organisation" and "People".

People



The screenshot shows the CRM People interface. At the top, it says "CRM People : Listing of person details recorded in the CRM system" and "Filter : No Filter". Below this are several action buttons: Refresh Report, Print, Export, Clear Sort, Clear Filters, Save Report Setting, and Clear Report Settings.

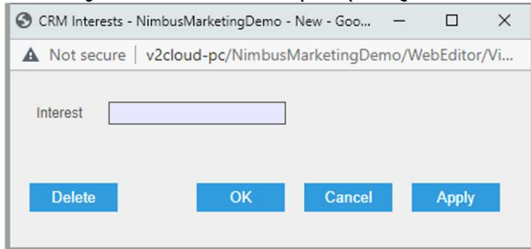
The main table has columns: Person Index, Title, Initials, First Name, Last Name, Mobile, Email, Unsub All, Closed, and Interests. The table contains the following data:

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	--
Delavare, Andrew	Mr	A	Andrew	Delavare			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:

Log Work	Log Call	Rating	Org Hi...	C...	U...	Call Hi...	Phone	Shortname	Mobile	Old	Notes	Contact Manager	Email

The Call Log defaults all the relevant fields for you:

