# CRM 7-7
Administration Guide

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Introduction

Conventions Used Throughout Guide

The following conventions are used throughout this guide:

This graphic indicates vital information that you should not overlook.

Tip boxes contain shortcuts and alternate methods for performing tasks.

Note boxes contain information of special interest related to topics.

Product Description

OnContact CRM 7-7 uses the latest Microsoft .NET platform, Silverlight and Windows Presentation Foundation. It provides a customer relationship management (CRM) system for mid-market companies and houses all the critical business information an organization needs to develop effective sales, marketing and customer service strategies. CRM 7-7 gives your sales, marketing and customer service professionals--from associate to executive level--the tools they need to effectively manage prospects and customers by providing a detailed snapshot of the complete customer and prospect relationship, including account history and organizational hierarchy.
Product Overview

Five windows are used to enter and maintain information in OnContact CRM 7-7. Each represents a table (entity) in the database where the records are stored. You can maintain an unlimited number of records and related information for all entities.

Entity Relationships

- **Company**: Companies are customers, prospects, partners, competitors or other businesses you want to keep information on.

- **Contact**: Contacts are the people your business interacts with. Add contacts not only to company records, but also to activities, opportunities and incidents.

- **Opportunity**: Opportunities help you plan and manage your sales process and monitor the effectiveness of strategies for closing deals.

- **Incident**: Incidents allow you to track issues that require customer service or technical support.

- **Activity**: Activities are used to record interactions with companies and contacts (for example, telephone calls, meetings), and to record tasks or events associated with opportunities and incidents.

- **Defect**: Defect records keep track of known problems with products, and assigns these problems to the person responsible for correcting them.
Product Features

Navigation
One central window designed with a logical interface and a convenient tab orientation allows your team to navigate effortlessly through the system using the intuitive workspace and tool menus. You can view, edit and search for important customer data in record time.

Account Management
CRM 7-7 maintains a history of all interactions with customers and prospects on an individual or company-wide level. The interface is completely customizable, which allows representatives to decide how they want to manage their customer and prospect relationships.

Marketing
CRM 7-7 marketing management module runs extensive queries mining the exact customer and prospect data you need using the marketing and call center features. This area of the software uses query results to generate reports that help plan campaigns, as well as evaluate the results of past campaigns. OnContact executes blast email, broadcast fax and direct mail campaigns. The marketing module manages lead sources, areas of interest and campaigns associated with specific prospects and customers and identifies which marketing efforts are boosting business and which ones aren't paying off.

Customer Service
CRM 7-7 makes outstanding customer service a reality by delivering a full-scale customer service and help desk management system that enables representatives to track customer service inquiries, incidents and problems. CRM 7-7 creates a knowledge base that support professionals can access in an instant. With instant access to the knowledge base, the support team can provide fast resolution for new incidents and problems — no matter how complex they might be.

System Tool
The System Tool ensures you can capture the exact information your business needs by completely redesigning any field or screen, or by adding new fields or screens. Create an unlimited number of user controls. Control field labels and data elements, such as size, font attributes, color and screen layout. The System Workspace allows you to reconfigure the look and feel of CRM 7-7.

The System Tool also enables an organization to automate its sales, marketing and customer service areas by adding workflow logic to CRM 7-7. These capabilities let a company imbed business rules so CRM 7-7 actually conforms to specific business processes. Adding business rules is a major asset to an organization because it helps employees perform tasks faster and more accurately.
Email Integration
CRM 7-7 makes email integration a breeze. This solution provides comprehensive bi-directional integration with Microsoft Outlook so you can work in either environment. With email integration, all interactions are stored in the database so there is no need to search through your email folders. You have the power to take control of your data. All you need to do is develop the marketing messages. CRM 7-7 ensures that delivering and tracking them is quick and easy.

Project Management
The primary objective is to provide means to plan projects, track progress of projects and review completed projects for both positive and negative performances. For planning, the focus is on understanding what work is included in the project, as well as estimating project costs. Project templates provide fast construction of project detail with options to build signoffs directly from the project.

Training and Documentation
Self-Paced Classes, Video Tutorials and Reference Guides
These materials are all available on the Support area of our website: www.oncontact.com.

Live Webinars:
We conduct weekly webinars on a variety of subjects at no charge for our customers. You can find a current schedule on the Support area of our website: www.oncontact.com.
**Points of Contact**

Questions and issues will arise during the usage of CRM 7-7, so it is helpful to know whom to contact for various requests.

**Project Manager.** The project manager is your point of contact for the following:

- Questions on data mapping and migration
- Custom modifications that need to be made to the software
- Additional screens that need to be added or modified
- Project goals and time frames
- On-site services
- Future upgrades of CRM 7-7

**Customer Service Department.** The Customer Service Department is available to handle issues that require immediate attention:

- Scheduling one-on-one training (billed hourly)
- Annual maintenance renewals
- Billing questions and concerns

The Customer Service Department may be reached at the following:

E-mail: cs@OnContact.com
Phone: (262) 375-6555

Live Chat through the CRM7 application (by clicking the ‘Help’ button) or via our website: [http://www.OnContact.com](http://www.OnContact.com).

**Technical Support.** The Technical Support staff is available to assist with any problems encountered with the software. Each client should designate one point of contact to interface with the OnContact Technical Support staff.

**Technical Support Request Process**

In general, technical support issues can be broken down into three categories:

- Usage-based questions
- Run time errors in the software
- Issues with third party software

Users should handle each type of support issue in a unique manner:
**Usage-Based Questions.** How to perform certain actions in the software. When users have general questions on how to do something in the software, they should follow these steps:

1. **Consult the Reference material online.** Most questions can be addressed and answered by reviewing material available online.

2. **Consult your System Administrator.** One of the responsibilities of the system administrator is to assist users with the software. Ask the system administrator if you can’t find the answer to a question online.

3. **Contact OnContact Support.** If your system administrator cannot answer these questions, call, chat, or email OnContact Technical Support. The e-mail address is listed below. 800-490-9010 or callcenter@workwiseinc.com

**Run-Time Issues.** If you encounter errors, or unexpected behavior while running CRM 7-7 you should:

1. **Try to Recreate the Error.** This should be done immediately after the error occurs.

2. **Document the Error.** Write down any error messages, including text and numbers. Outline the actions taken in CRM 7-7 that led up to the error. When the error message appears, simply press the Print Screen button on the keyboard, and paste the image into a graphics program. Then save it as a bitmap image. Include this file in your e-mail to Support.

3. **Contact your System Administrator.** Provide all documents collected in step 2 to your system administrator.

4. **Report the Error to OnContact Technical Support.** If your System Administrator cannot resolve it, submit all relevant information to OnContact through e-mail, phone or live chat.

**Issues with third party software.** If system issues arise, report them to the system administrator. OnContact Technical Support will provide guidance and advice in any of these areas but only as these areas as they directly relate to CRM 7-7. Third party software is defined as any software not licensed directly by OnContact. Technical support is not extended to direct support for Visual Studio, Visifire, SQL Server, Outlook and Windows.
Requirements for Submitting a New Technical Support Request

To assist clients with Technical Support requests, we require the following be submitted with the request:

- Product version including sub release. Find this information in Help > About.
- Database Engine (currently only SQL Server)
- Screen shot to be sure the question is presented clearly.
- Configuration file web.config or OnContact.cfg
- Steps taken prior to the error that reproduce the problem

Depending on the reported issue the following may also be requested:

- On how many machines does this occur: one, several or all machines tested?
- Has this been tested against more than one database? If so, is the problem consistent against all databases tested?
- Is the issue reliably duplicated or intermittent? If it is intermittent, how frequent?
- When was the problem first noticed? If it was fine in the past, what has changed?

New support requests should be submitted either by email to support@OnContact.com; or through Live Chat through the CRM7 application (by clicking the ✉ ‘Help' button) or via our website: http://www.OnContact.com.
Overview

Administration Window

Use the shared row of toolbar buttons on each setup window for controlling the creation and maintenance of system codes.

Administration Window Toolbar

If you are customizing the software with new setup codes, you can add groups and items using the System tool, which entails System (Developer) training.
Setup Window Toolbar

Click on the **Expansion Arrow Button** to expand the setup window toolbar. You should see the above-pictured tool bar.

Click **New** to add a new setup record. Click **Delete** to cancel the active setup record.

Click **Refresh** to refresh the window with any changes that were made.

Click on **Export** to export the setup code listing to a Microsoft Excel spreadsheet.

Click on **Filter** to open a zoom window that allows you to filter the setup code listing based on available columns.

Click on **Group** to group the setup code listing by available columns.

Click on **Layout** to change the layout of the setup code listing.

**Setup Window Features**

You will see the **Description**, and not the code, displayed throughout the system.

All setup windows contain an **Active** checkbox. It will be selected unless you clear it. It is recommended that you de-activate an unneeded code rather than delete it. Inactive codes will not be available to the user.

If a user is assigned to more than one setting group, the settings in the group with the highest **Hierarchy** value will be used.
Activity Basics

Step by Step Procedure Guide and Tutorials

Activities are the single, individual tasks that need to be performed by your company's representatives. Examples of Activities include a meeting, a product demonstration, sending an email and making a telephone call. You can schedule Activities that are related to companies, contacts, opportunities and incidents, and you can schedule activities that are not related to an entity record. When you do, these Activities appear on your To-Do list and/or Calendar Dashboard, until they are completed and saved with a Result code.

Users record what has happened, or schedule future tasks, using Activities. There is a variety of setup codes associated with activities.

There are three major components involved in creating an Activity:

- **Action**: Describes the kind of interaction such as email, meeting, phone call, etc.
- **Result**: Describes how the Action was completed, such as sent, left message, or completed. These are linked to the various Actions accordingly. Results are used to trigger the removal of the Activity from the To-Do list.
- **Action Set**: Defines the set of actions that are available to a user or group of users. All Actions must be included in at least one Action set.

**Action**

1. Click Activity to open the Activity Code search window (No Activity codes are displayed yet)

2. Click the Search button to display all the Activity Codes currently defined.

3. Click the New button to add a new Activity Code.
4. Type an **ID Code** and a **Description**. Note that the DESCRIPTION (not the Code) is what the user will see when they are logging Activities.

5. Click the newly added Action Code to open the detailed setup screen:

6. Optional: Choose an **Action Type** to categorize the code for reporting purposes, and assign a **Campaign** to associate the action with a specific campaign.

7. **Outlook integration** is affected by **Schedule Type** and **Prompt for Schedule**. Choose Appointment or Task for Schedule Type to add this type of activity to the user's Outlook calendar or task list. Select a value for **Prompt for Schedule** to display a prompt, automatically add the calendar or task item or not display a prompt or add the item.

8. Select the **Results** tab to define the options for completing this **Activity** (such as Sent, Completed, Left Message). **Results** are possible outcomes for an activity. They complete an activity and remove it from the user's To Do List. Activities can have one or more Results.

9. Click New to add one or more **Results** for the **Action**.
Result
10. Assign this **Action** to one or more user groups on the **Action Set** tab.

**Action Sets** identify categories of Actions for a specific subset of users. They are used to limit the action codes available to a user's area of responsibility.

At least one Action Set must be set up. If all users use the same Actions, one Action Set must exist, and all Actions should be assigned to it.

Actions link to Action Sets on the **Action Set** tab on the **Setup – Action** window.

Each user is assigned to one Action Set on the main form of the **Setup – User** window. This determines the activities the user can create.
Activity Details

This section covers the following Activity setup:

- Action Type
- Cost Group

**Action Type**

Action Type is optional; use it to group Actions for reporting and querying purposes.

**Cost Group**

Identify types of costs by setting up Cost Groups. Enter the cost amount on the Costs tab on the Setup – Action window.
Example: Actions

Planning Actions

Suppose that you need to set up actions for a call center. Call Center Representatives (CSRs) will be making **outbound calls soliciting magazine subscriptions**.

**Action Sets**

This type of action is typical of a Customer Service user, so you will not need to add an action set. Assign this action set to this action.

**Action Types**

This action is a Sales and Marketing action type so you will not need to add an action type. Assign this action type to this action.

Let's plan each action in detail.

**Outbound Calls Soliciting Magazine Subscription**

After a CSR places this call, he can apply one of several results: Magazine Subscription, Send Magazine Information, Left Message, and Canceled.

Here are the new entries you need to make:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OUTMAGSOL</td>
<td>Outbound Call Soliciting Magazine Subscription</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Result</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAGSUB</td>
<td>Magazine Subscription</td>
</tr>
<tr>
<td>SENDINFO</td>
<td>Send Magazine Information</td>
</tr>
<tr>
<td>MESSAGE</td>
<td>Left Message</td>
</tr>
<tr>
<td>CANCELED</td>
<td>Canceled</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SENDBILL</td>
<td>Send Bill to Customer</td>
</tr>
<tr>
<td>SENGMAG</td>
<td>Send Magazine to Customer</td>
</tr>
</tbody>
</table>
**Setting up the Codes**

Begin by setting up the Result codes. The Canceled, Message, and Completed results are already in place.

1. Add the Magazine Subscription and Send Information results.

![Result Codes](image)

2. Set up the following for the Send Bill to Customer action and save.

<table>
<thead>
<tr>
<th>Main Form Column</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Code</td>
<td>SENDBILL</td>
</tr>
<tr>
<td>Description</td>
<td>Send Bill to Customer</td>
</tr>
<tr>
<td>Action Type</td>
<td>Miscellaneous</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Results Tab</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Result Code</td>
<td>Completed</td>
</tr>
<tr>
<td>Default Flag</td>
<td>selected</td>
</tr>
<tr>
<td>Result Code</td>
<td>Canceled</td>
</tr>
<tr>
<td>Default Flag</td>
<td>cleared</td>
</tr>
</tbody>
</table>
3. Set up the **Send Magazine to Customer** action and save.

<table>
<thead>
<tr>
<th>Main Form Column</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Code</td>
<td>SENDMAG</td>
</tr>
<tr>
<td>Description</td>
<td>Send Magazine to Customer</td>
</tr>
<tr>
<td>Action Type</td>
<td>Send Document</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Results Tab</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Result Code</td>
<td>Completed</td>
</tr>
<tr>
<td>Default Flag</td>
<td>selected</td>
</tr>
<tr>
<td>Result Code</td>
<td>Canceled</td>
</tr>
<tr>
<td>Default Flag</td>
<td>cleared</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Costs Tab</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Group Code</td>
<td>Literature</td>
</tr>
<tr>
<td>Amount</td>
<td>18.00</td>
</tr>
<tr>
<td>Cost Group Code</td>
<td>Postage</td>
</tr>
<tr>
<td>Amount</td>
<td>12.00</td>
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</table>

<table>
<thead>
<tr>
<th>Action Set Tab</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Set Code</td>
<td>Customer Service</td>
</tr>
<tr>
<td>Action Set Code</td>
<td>Sales and Marketing</td>
</tr>
<tr>
<td>Action Set Code</td>
<td>Administration</td>
</tr>
</tbody>
</table>
4. Set up the **Send Magazine Information** action and save.

<table>
<thead>
<tr>
<th>Main Form Column</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Code</td>
<td>SNDMAGINFO</td>
</tr>
<tr>
<td>Description</td>
<td>Send Magazine Information</td>
</tr>
<tr>
<td>Action Type</td>
<td>Send Document</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Results Tab</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Result Code</td>
<td>Sent</td>
</tr>
<tr>
<td>Default Flag</td>
<td>selected</td>
</tr>
<tr>
<td>Result Code</td>
<td>Canceled</td>
</tr>
<tr>
<td>Default Flag</td>
<td>cleared</td>
</tr>
</tbody>
</table>
5. Create a new Action with the following:

<table>
<thead>
<tr>
<th>Column</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Code</td>
<td>MAGSOL</td>
</tr>
<tr>
<td>Description</td>
<td>Outbound Call Soliciting Magazine Subscription</td>
</tr>
<tr>
<td>Action Type</td>
<td>Telephone Call</td>
</tr>
</tbody>
</table>

6. Add the following results.

<table>
<thead>
<tr>
<th>Column</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Result Code</td>
<td>Magazine Subscription</td>
</tr>
<tr>
<td>Result Code</td>
<td>Send Information</td>
</tr>
<tr>
<td>Result Code</td>
<td>Left Message</td>
</tr>
<tr>
<td>Result Code</td>
<td>Canceled</td>
</tr>
</tbody>
</table>
User Setup

Set up each individual who will use the OnContact Software.

**Step by Step Procedure Guides and Tutorials**

**Job Function**

Assign each user a **Job Function**. **Job Function** defaults into User Role within the application.

**Territory**

Assign users to a geographical **Territory** on this window. Users can belong to one or more territories. You can also use **Territories** for **Contacts** and **Companies**.
**User**

Set up each user with **Name**, **Title** and **Job Function** information. Click **More...** To add email information, etc.

**Groups**

Users can be restricted, or allowed access, to certain areas of the software. Use **Permission** groups to set up these restrictions.

**Group Tab**

Use the **User Setup window Group** tab to assign permissions to the user.
**Email, Address, and Phone**

Enter the user’s **Phone, Address** and **E-mail** information on these tabs.

**Important:** Click the **Register email** icon if this user will be sending mass emails from CRM.

**Territories**

Assign the user to one or more Territories.

**Sales Quotas**

Enter in **Sales Quotas** for each user.
Using Windows Authentication for Log In
If you are using CRM on-premise, you can optionally use Windows Authentication to allow users to log in via their Windows network id/password.

1. Enter valid login ID for all users in the form Domain\User (e.g. mydomain\me)
2. In IIS, configure website for windows authentication
3. For WPF client and Outlook Add-in, there is an Integrated Login checkbox in the Advanced section of the Login window that needs to be checked.
Security Permission Groups
Security Permission Groups assignment is handled through System (Development) training.

Group Setup

Each permission group is set up on the Group – Edit Group setup window.

Report Groups

Report groups associate reports to the user via the group to which they are assigned.
**Search Groups**

*Search groups* associate searches to the user via the group to which they are assigned.
Mail Merge

Use the Document – Merge Edit to edit existing merge documents and \ or to link new ones to the CRM7 application.

Use Microsoft Word to set up templates for mail merge, and an HTML editor such as Microsoft Notepad to set up templates for e-mail merge.

Step by Step Reference and Tutorials

Creating a New Merge

Click New to create a New Merge.
Enter a **Name** and **Description** for your **New Merge**.

Choose an **Entity** to return tables relevant to your setup (such as contact or company). The associated **View** information will default in.

Choose the **Document Type Flag** and **Process Type Flag**, which determines if the **merge** is for **Mail** or **Email**.

Choose an **Action Code** if you want the Activity window Document tab to automatically display so that you can set up the document for batch processing.

**Save & Close** the **New Merge**.

All **Merge documents** are stored in the **CRM7-7** database.
Double-click on the New Merge you just created. Click on Edit Document. Click Open to open a new template for the New Merge. Click Yes to run the SQL command.

Format your Word Document, inserting the Merge fields as needed. See the example below. Once complete, Save the document in Microsoft Word.
Save your New Microsoft Word Merge document in an easily found location.

Back in CRM, click Upload merge template. From the opened zoom window, select your saved Microsoft Word document template that you just created.

Test out your New Merge by click the Test button. If prompted to Save the document, answer Yes.

Choose one or more records to use for the test. Click OK. You should see your New Merge in Microsoft Word, with completed merged fields. Verify the Activity Option (i.e Create Activity for each).
Knowledge Articles

In the Knowledge tool, click New, then Article.

Enter an appropriate Description for the article. Place the text of the article in the notes section of window, or record it separately and use the Attachments tab features to link it to the window.

Make the search for a knowledge article more accurate by identifying Knowledge Base Keywords. You will be able to search on these words to find a Knowledge Base article.

Search for Group to associate the article with. The groups are listed in the Articles portion of the Knowledge window side toolbar.
In the **Reports** tool, click on **Reports**, and select the Report you wish to run.

If you are unfamiliar with the reports, there is a [Report Description guide available in the Tutorial section of our website](#).
Reports Development

Reports are built using Microsoft SQL Server Business Intelligence Development Studio. CRM 7-7 ships many Microsoft Reporting reports with the basic package and supports the use of those reports. However, OnContact Software does not support users in the development of their own Microsoft SQL Server Business Intelligence Development Studio reports.

Report Setup

Once you have created a report using Microsoft SQL Server Business Intelligence Development Studio, load the generated .rdlc file into the target database using the Reports – Edit Report screen, and clicking the New button.

On the New Report window, you can then enter the Name, Display Name, Group information, then click the 'New' button. On the 'Data' tab, you can then enter the name of the .rdlc file and browse out to it to link it using the paper clip icon ( )
Using Quick Search

The search and navigation features in CRM 7-7 provide fast ways for you to search for any data you need, from anyplace in the system. Once you have searched for one or more records, you can select and work with them in many different ways.

The left side of your screen contains search functions. The top area provides a Quick Search – just type some or all of the name you’re looking for, and press enter. You can also type part of the name and use the * symbol as a wild card, as we did here in our example. Click any of the search results to open them in a new tab.

By default, Quick search is set to look at all types of records. If you like, you can change it to search for only Company, Contact, Opportunity or Incident records.

New and Saved Searches

You can do a new search, or use a Saved search. Many Saved Searches are provided to you, and you can create and Save your Own Custom saved searches to use over and over again.

This example shows a Search called ‘My Contacts.’

You can add search criteria to any search by clicking Layout icon (.), and choosing from the available fields.

If you want to save the search, click Options and choose Build a Saved Search.

Note: Searches opened from the Marketing tool in the application are used to retrieve data specifically aimed at marketing.

Further customization can be done through System (Developer) training.
You can use the **Layout** tool in the Search results toolbar to add additional columns in the **results** pane of your search.
Example: Searches

In this section, we will create and save a search based on the existing Contact Search, but with filtered territory and interest data added.

1. In the Workspace tool, expand the New Search tab and click Contact.

2. Click the Options button and choose Build Saved Search. The Advanced Search window is displayed.

3. From the Available Columns list, expand the Territories node, select Territory and click on the white and yellow arrow ( ).

4. Click on the Save As button on the main Advanced Search menu. Enter a unique Name for your query and click OK.
5. In the Filter window, choose **is not empty** from the list of filter choices. The filtered ContactTerritoryTerritory should be listed in the right hand pane.

![Filter window](image)

6. From the Available Columns list, expand the Interests node, select Interest and click on the white and yellow arrow ( ),

![Available Columns](image)

7. In the Filter window, choose **is not empty** from the list of filter choices. The filtered ContactInterestInterest should be listed in the right hand pane.

![Filter window](image)

8. Click **Save** at the top of the Advanced Search window and click **Ok** on the Search successfully saved. Close the Advanced Search window.

![Advanced Search](image)


![Saved Searches](image)

10. To add in the same fields to display in the results pane, click **Options** then Select Columns. Click Territories and then click the arrow button on the Id column. Do the same for Interest. To move a column to the left or right, select the column, then click the Move Up or Move Down arrow respectively. Click OK.

![Select Columns](image)

11. Select Interest from the Available Columns list of the Select Columns window, and then click on the arrow to Add the column to the Active Columns list. Do the same for Territory. To remove a column, click the Click OK.

12. Click **Options** and select **Save Preferences** to save your modifications.

*Note: You can click Options and select Restore Defaults to restore the query.*
Workflow, Export, Group & Filter

Step by Step Reference and Tutorials

Workflow: Assign List

From either the Workspace or the Reports tools, select Saved Searches or Reports, depending on which you choose. Click either the Company or Contact entity; click on the Open Search button ( ); click on the Search button ( ) to return all rows for that entity; or click on the Change Search Type button ( ) to the right of the Advanced button. Enter data to filter by and click the Search button ( ) to return your filtered results. Click on Layout button to add more fields to filter by.

Select Control-A to select all the rows in your returned query.

Click the Workflow button and select Assign List.

From the Assign List, List drop down, choose a list description to assign to the selected contacts. If you wish to, choose a List Subgroup and \ or change the Assignment Date, you can do so here. Click the Accept button when you are done.

You should receive a processing message. Click OK when processing is complete.
Workflow: Assign Activity

Return Company or Contact records from a query of your liking using the aforementioned instructions.

Select Control-A to select all the rows in your returned query.

Click on the Workflow button and select Assign Activity. In the Assign Activity window, select \ enter in data for the fields that you are interested in; then click Accept.

You should receive a processing message. Click OK when processing is complete.

Verify that the Activity records were assigned.
Workflow: Assign User

Return Company or Contact records from a query of your liking using the aforementioned instructions.

Select Control-A to select all the rows in your returned query.

Click on the Workflow button and select Assign User. In the Assign User window, select data for the fields that you are interested in; then click Accept.

You should receive a processing message. Click OK when processing is complete.

Verify that the Activity records were assigned.
Return **Company** or **Contact** records from a query of your liking using the aforementioned instructions.

Select **Control-A** to select all the rows in your returned query.

Click **Options** and select **Export**.

From the **File Download** window, you can either **Open** or **Save** the generated **Microsoft Excel workbook**.

If you choose **Save**, a browser window will open, prompting you to choose where on your system to save the generated **Microsoft Excel workbook**.
Whether you choose to **Open** or **Save**, you should see the data from your query in a Microsoft Excel workbook as in below.

![Microsoft Excel screenshot](image)

From here you can perform the same tasks that you can in **Microsoft Excel**.

**Group**

Return **Company** or **Contact** records from a query of your liking using the aforementioned instructions.

Click **Options** and select the **Group** button. Choose the field(s) that you want to group by from the list.

![Group button](image)
You should see your queried data grouped by the column you chose. This example is grouped by Company:

From here you can then use the aforementioned Export button, to export to a Microsoft Excel workbook, group by the field you chose.

**Filter**

Return Company or Contact records from your query. Click Options and select Filter.

From the Filter Data window, expand the node and click on the yellow and white arrow to move the field into the Filter column.
Outlook Add In

Step by Step Reference and Tutorials
Self-Paced Training

Use the Microsoft Outlook Add In to easily send email messages and calendar appointments to OnContact.

From Microsoft Outlook, click the Add-Ins tab, and choose OnContact Login.

First Time Login

The first time that you log in, you’ll need to provide some additional information to connect to CRM. You will only need to do this the first time you login in-after that, you’ll only need to enter your password if you check the ‘remember me’ checkbox.

Click the orange Advanced hyperlink on the Login page to verify the connection information.

Make sure that The Connect to Web Server option is selected.

The Server Address field should contain the same address that you use when you sign into CRM from a browser – except, leave out the “oncontact.aspx”
Synchronization with CRM7

Select **Options** from the CRM 7-7 icon on the Outlook toolbar to configure CRM 7-7 – Outlook integration.

Select **Sync** to sync activities with CRM 7-7. Selecting this will sync appointments that were either sent to CRM from Outlook or from Outlook to CRM by the user.

As you are working in Outlook or CRM, you’ll decide which items to synchronize. These include email messages and calendar appointments.

Don’t be tempted to synchronize EVERYTHING. Instead, select those email messages that contain relevant information, such as the last one in a string of email exchanges.

When you have an email that you want to record in OnContact, INSTEAD of clicking the Outlook Send button, click the Add-In tab. Then click the Send to OnContact CRM button.

When you do, a CRM Activity record will open for you to add any notes or other information and save in CRM. Notice that the Activity record includes all of your email’s content, as well as any attachments you may have added.

CRM will search through the database to find an exact match for the email address(es) you are sending the meeting notice to. If it matches one already in CRM, that contact will
be linked to the Activity Record. If not, you can either add this as a new contact, or search for a contact in CRM and link this new email address to their contact record, along with the Activity record you are creating.

When you save and close this record, it will be sent to CRM.

**Other Ways to Synchronize from CRM to Outlook**

You can also integrate activities to Microsoft Outlook by selecting an activity or activities and selecting the Export button on the main activity menu toolbar.

Select **Yes** to export the activity to the Microsoft Outlook calendar.

Select **Sync** to sync appointments that were either sent to CRM from Outlook or from Outlook to CRM by the user.

Select the **destination calendar** folder where you would like the activity stored.

Click **OK**.
Contact Method

Use Contact Method on contact and company records to identify the company's or contact's preference for corresponding with your company. Examples: eMail, Letter, Do not contact, telephone call

Contact Status

Use Contact Status to identify the current state or position of the contact. Enter multiple status codes. Use the IsActive checkbox to narrow down the status of a contact record as Active or Inactive. Examples: Active, Inactive

Link Contacts

Use Contact Member and Contact Relationship to link contacts.
Use **Contact Member** to identify the role of a contact in a relationship with another contact.
Examples: Business, Family, Personal, Professional
Contact Relationship

Use **Contact Relationship** to define the relationship between contacts. Examples: Business, family, personal, professional

Internal Title

Use **Internal Title** to classify the internal role of the contact in the Department of a company. A contact can have more than one company/contact relationship. Examples: Chief Financial Officer, Manager, Sales Representative
**Nickname**

This is the table linking common nicknames to actual full names. It is used to normalize contact first names to their proper name equivalent before calculating soundex values. This provides better duplicate matching when deduplication is run. This table is preloaded for you.

**Salutation**

Use **Salutation** to define a formal prefix for a contact name. Its Description displays when contact information is merged during the Mail Merge.

Examples: Dr, Mrs, Mr, Ms
Company Profile

Use **Company Profile** to custom-design groups of companies, or profile companies, by industries or types of business.
Examples: Health, Legal. Pharmaceutical, technology

Company Status

Use **Company Status** to identify the current state of the company. Enter multiple status codes. The **Is Active** checkbox allows you to narrow the status to Active or Inactive.
Examples: Active, Inactive, Prospect-Hot, Prospect-Cold
Company Role

When you link a contact to a company, use **Company Role** to identify the specific part a contact plays at the company. For example, Company 1 is a manufacturer, and Company 2 is a reseller of Company 1’s products. Examples: Board Member, Reseller, manufacturer, consultant

Company Associations

Company Member

Use **Company Member** to define the **Role** of a company in a relationship between companies on the Company Association window. Examples: Consulting, Division, Headquarter, Subsidiary
**Company Relationship**

The Relationships tab lists a company's relationships with OTHER companies. Relationships are not the same as the Divisions, which links companies that are part of the same organizational structure. List a company's competitors or other types of relationships on the tab.

Examples: Business, competitor, corporation, organization, partner

**Company Type**

Use **Company Type** to design major categories for companies.

Examples: Competitor, Active Customer, Do Not Call, Business Partner, Vendor

⚠️ COMPETITOR must be a Company Type to record information about competing companies.
Use **NAICS (North American Industry Classification System)** codes as an industry-standard method for classifying companies. This table is pre-loaded.
Address

**Address Type**

*Identifies the destination for an address. Used in mail merge functions.*

**Time Zone**

The *Time Zone* table is pre-loaded. It contains *GMT (Greenwich Mean Time) Offsets* for each zone.
The **Country** table is pre-loaded.

The **County** table is pre-loaded. FIPS (Federal Information Process Standard number) codes are used to populate columns in this table.
**State**

The **State** table is pre-loaded. It stores descriptors for U.S. states and territories and Canadian provinces.

**Zip Code**

The **Zip** table is pre-loaded with codes that define geographic delivery areas.
Use **Campaign Status** to identify the current state or position of the campaign.

**Media**

Use **Media** with **Source** as a way to narrow down the method by which customers and prospects become aware of your organization. Use **Source** to identify the method by which your company becomes known to prospective customers (for example, TV, radio) and also to group activities.
Batch Status

Use **Batch Status** to identify the current state or position of the batch.

Enclosure

Use **Enclosure** to define different types of enclosures.
Use Email Type to distinguish the various e-mail addresses on company and contact records.

Interest
Use **Interest** to record the products and services inquiries by a company or contact. An Interest category is comprised of one or more **Interest Sub Group Codes**. Subgroups are not mandatory.

**Interest Subgroup**

Use **Interest Sub Groups** as subsets to qualify the Interest code. Use **Sub Group** entries for more than one Interest group.

**Interest Status**

Use **Interest Status** to indicate the level of interest.
**List**

Use **Lists** to assign companies and contacts to categories for the purpose of mailing lists, queries and any other categorization. A List can be comprised of one or more **List Subgroups**.

**List Subgroup**

Use **List Sub Groups** as subsets to qualify the List code. You can use **Sub Group** entries for more than one List group.
**Phone Type**

Use **Phone Type** to define a category of phone number.

**URL Type**

Use **Url Type** to define a category of web address.
Your Customer Service team can track customer questions, problems, returns and other issues by using the Customer Service functions in OnContact.

There are three primary record types used to manage this: Incidents, Defects, and Resolutions.

**Services Dashboard**
The Services dashboard provides each user with a selection of panels to manage Incidents:

- **To Do List By Activity**: Displays interactive graph of all open Incidents, grouped by Incident Type.
- **Incident by Volume**: Displays interactive graph of all open Incidents by Volume
- **Incident Performance by Rep (Duration)**: Displays an interactive graph showing the total duration for all the Incidents for each Rep.
- **Incident Open Cases by Priority**: Displays all Open Cases that have a Priority of ‘High’ that are assigned to the User who is logged in.
- **Incident Top 10 Cases**: Displays all Open Cases that have a Priority of ‘High.’
- **Incident cases by Representative**: Displays an interactive pie chart of all the Open incidents for each Rep.
- **Open Incidents for User**: Displays all the open Incidents for the User who is logged in.
**Incident Record**

The Incident record tracks each individual issue or case, and assigns each a unique Case #. The records are linked to the Company and Contact, and are assigned to a Representative for resolution.

It offers tabs for:
- Notes
- Activities
- Resolution
- Attachments

**Defect Type**

If appropriate, link the Incident to an appropriate Defect Type category.
**Incident Status**

Use **Incident Status** to identify the current state or position of the incident. Enter multiple status codes. The **IsClosed** checkbox allows you to narrow down the incident as Closed or Open. Closed Incidents are removed from the Open Incident panels of the Customer Service dashboard.

---

**Product**

Used to link the Incident case to an appropriate product.
**Product Part**

Used to link the case to a specific Product Part that is causing the issue.

**Version**

Used to link the case to an appropriate Product Version.
**Contract Type**
Used to link the case to a Contract that has been assigned to the Company.

**Incident Type**
Used to categorize Incidents for reporting and tracking purposes.

**Assigned to**
Each case can be assigned to one or more Reps for resolution.

**Duration**
This is a calculated field, and displays the amount of time that elapsed from when the case was first opened to the time it was closed. This value is displayed on some of the Customer Service dashboard panels and in reports.

**Priority**
Classify any case as a High, Medium or Low priority.
**Defect Record**

Defect Records are used to categorize Incidents for reporting and resolution purposes.

The following tabs are available from the Defect record:
- Notes
- Resolutions
- Attachments
- Versions
- Representatives
- Incidents

**Defect Description**

Free-form text field to describe the Defect.

**Defect Status**

Used to manage the current status of a Defect, and to determine whether or not the Defect is closed or Active.
Defect Type

Use Defect Type to define a category of defect.

Resolution Record

You can search for a Resolution from an Incident record, or add a new Resolution to any Defect record.

From the Incident record, click the magnifying glass to search for a resolution, and link it to the Incident:
Or, click New to link an existing Resolution or create a new one from the Defect record:

**Resolution Status**

Use **Resolution Status** to identify the current state or position of the resolution.
Opportunity & Order

Lost Reason

Use Lost Reason to aid in the analysis of unsuccessful sales opportunities.

Opportunity Priority

Use Opportunity Priority to rank opportunities according to importance.
**Opportunity Role**

When you link a contact to an opportunity, use **Opportunity Role** to identify the specific part a contact plays in the opportunity.

**Opportunity Stage**

Use **Opportunity Stage** to set up the steps for an opportunity.
Opportunity Status

Use **Opportunity Status** to define the current state or position of an opportunity. Select **IsSold** to cause the Status Code to update the Opportunity Status to **Sold**. Select **IsLost** to cause the Status Code to update the Opportunity Status to **Lost**.

Methods

Use **Methods** as best practices or established procedures that specify the manner in which sales **opportunities** and **campaigns** should be managed.
In the detail form at the bottom of this window, associate **Milestones** with **Methods**. **Milestones** are significant events or stages of campaigns and opportunities that should occur at specific times. Milestones also serve as reminders when related activities need to be performed. Set them up before setting up Methods.

**Milestones**

Use **Milestones** as significant events in the progress of a campaign or opportunity. Assign **Recommended Activities** and **log Notes** to the Milestone on the tab at the bottom of the window.

**Milestone Status**

Set up **Milestone Status** codes to track a milestone’s progress.
Order Setup

Use Manufacturer, Product Parts, Product Versions and Product to set up products. Discounts are applied on an order-by-order basis within the application. The remaining Order Setup Codes are used to populate drop-downs on the Order window.

Product Setup

Product setup includes adding optional Manufacturer, Product Part and Product Version. Set these up first.

Manufacturer

![Manufacturer Setup](image)

Product Part

![Product Part Setup](image)
Product Version

Set up a **Product** code and **Description** and enter a **Unit Price**. Optionally, choose a **Manufacturer** and one or more **Product Part** and **Product Version** entries.
**Order Status**

Set up **Order Status** codes to track an order's progress.

**Order Terms**

Set up **Order Term** codes to define an order's terms.
Order Type

Ship Method

Set up Ship Method codes to define an order's shipping method.
Dashboards

Step by Step Reference and Tutorials
Self-Paced Training

Click on the Dashboards tab to view the different dashboards you can select to open.

Use the Select button to control how many and which graphs of searches you want to display.

Clicking the Select button displays a zoom window of the graphs that are available.

The maximum number of graphs that you can display is four. To add a new graph to your dashboard from the available graphs, deselect one of the selected graphs, and select a new one.

Click any graph and drag it to the desired location on the respective Dashboard window.

Click Set As Default to save any changes you’ve made on the respective Dashboard.

Click Restore Defaults to restore the respective Dashboard back to the original OOB Dashboard layout.

Select the Enlarge toggle button to enlarge the given graph. Click it again to minimize the graph again.
Double-click on any portion of a graph to open a window with the query result rows. Once the results are returned from double-clicking a portion of the respective graph, you can apply Workflow, change the Layout, Export, Filter and Group as shown in the aforementioned sections.
Sales Dashboard

Double-click on any portion of a graph to open a window with the query result rows. Once the results are returned from double-clicking a portion of the respective graph, you can apply Workflow, change the Layout, Export, Filter and Group as shown in the aforementioned sections.
Customer Service Dashboard

Double-click on any portion of a graph to open a window with the query result rows. Once the results are returned from double-clicking a portion of the respective graph, you can apply Workflow, change the Layout, Export, Filter and Group as shown in the aforementioned sections.
Management Dashboard

Double-click on any portion of a graph to open a window with the query result rows. Once the results are returned from double-clicking a portion of the respective graph, you can apply Workflow, change the Layout, Export, Filter and Group as shown in the aforementioned sections.
**Marketing Dashboard**

**Double-click** on any portion of a graph to open a window with the query result rows. Once the results are returned from double-clicking a portion of the respective graph, you can apply **Workflow**, change the **Layout**, **Export**, **Filter** and **Group** as shown in the aforementioned sections.
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