



2015 WinNetStar Training Classes

Customer Relationship Management (CRM)

Software Development-F1
RIMSS Business Systems Technology

Company Confidential
Copyright © 1983-2015 RIMSS Business Systems Technology

This Document contains information proprietary to RIMSS Business Systems Technology. Use or disclosure without written permission is expressly forbidden.

WinNetStar includes features to facilitate the tracking and reporting of new sales leads. Users can create CRM Opportunities within the system to document the specifics of a particular sales lead and then use CRM Events to document each specific sales call or other related activity associated with the Opportunity. An Opportunity might be the potential sale of a piece of equipment to a prospective customer. All pertinent information about the Opportunity can be captured such as Customer Information, Dollar Amount, Projected Close Date, Probability of Close and much more. Then, each time a salesman contacts the prospective customer, the specific information about that contact and the results of that contact can be documented with a CRM Event. Reports can then be generated to display your various Opportunities and their related Events. The CRM Event includes an interface with Microsoft Outlook to facilitate the management and creation of Outlook emails, calendar appointments, tasks and contacts. Data elements within an Opportunity or an Event are highly customizable with numerous re-namable fields and user defined drop downs. The following screen shots illustrate the use of these features.

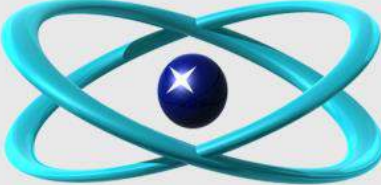
RIMSS.WinNetStar v7.0.0.1121 Enterprise:The Enterprise Company:ACME EQUIPMENT COMPANY (46) Location:SAN ANTONIO (47)

File View Company CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Scheduling Help

RIMSS WinNetStar

- New
 - 1205 Customer
 - 1215 Customer Receipt
 - 1220 Finance Charge
 - 1225 CRM Event Ctrl+E
 - 1230 CRM Opportunity Ctrl+O
- Find
- Support Lists
- Customer Statements

To create a new CRM Opportunity, navigate to CRM>New>CRM Opportunity. Please note that there is also a hot key option to open this form, Ctrl-O.



RIMSS WinNetStar
Advanced Enterprise System

Company: ACME EQUIPMENT COMPANY (46)
Location: SAN ANTONIO (47)

Client Desktop User: dale Role: Administrator Workstation: DALEOFFICE Server: V3Demo Database: WinNetStarApp Key Stroke Entry

11:59 AM 5/29/2013

RIMSS.WinNetStar v7.0.0.1121 Enterprise:The Enterprise Company:ACME EQUIPMENT COMPANY (46) Location:SAN ANTONIO (47)

File View Company CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Scheduling Help

RIMSS WinNetStar New Opportunity

Save Save and Close

General Attachments

Date: 5/29/2013 Opportunity #: 0
 Customer: JOHNSON FARMS Name: Sale of New Trucks to Replace Fleet
 Owner: Lee Chesnut Lead Source: Cold Call
 Category: Truck Type: Fleet Purchase
 Est. Amount: \$350,000.00 Est. Close Date: 8/31/2013
 Stage: Lead Probability: 35.00 %

Inactive

Note: This customer is needing to replace 5 trucks in their fleet prior to August of 2013

The New Opportunity form will open as a new tab. Customer, Salesman and Name are required fields. The Lead Source, Category and Type drop downs are customizable by the user under the CRM Support List menu option.

Renameable Fields

Renameable Field	Value
Acres	2500
Primary Crop	Rice
Planting Date	4/1/2013 12:00:00 AM
Previous Purchases	No
CRMOpportunityRenameableField5	
CRMOpportunityRenameableField6	
CRMOpportunityRenameableField7	
CRMOpportunityRenameableField8	
CRMOpportunityRenameableField9	
CRMOpportunityRenameableField10	
CRMOpportunityRenameableField11	
CRMOpportunityRenameableField12	
CRMOpportunityRenameableField13	
CRMOpportunityRenameableField14	
> CRMOpportunityRenameableField15	

The Opportunity also includes 15 re-namable fields that can be set up under the CRM Support List menu option.

Client Desktop User: dale Role: Administrator Workstation: DALEOFFICE Server: V3Demo Database: WinNetStarApp Key Stroke Entry

12:07 PM 5/29/2013


RIMSS.WinNetStar v7.0.0.1121 Enterprise:The Enterprise Company:ACME EQUIPMENT COMPANY (46) Location:SAN ANTONIO (47)

File View Company CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Scheduling Help

RIMSS WinNetStar

- New
- Find
 - 1250 Customer
 - 1260 Customer Receipt
 - 1265 Finance Charge
 - 1270 CRM Event
 - 1275 CRM Opportunity
- Support Lists
- Customer Statements

To produce a report of your Opportunities, navigate to CRM>Find>CRM Opportunity.



RIMSS WinNetStar
Advanced Enterprise System

Company: ACME EQUIPMENT COMPANY (46)
Location: SAN ANTONIO (47)

Client Desktop User: dale Role: Administrator Workstation: DALEOFFICE Server: V3Demo Database: WinNetStarApp Key Stroke Entry

12:21 PM
5/29/2013

RIMSS.WinNetStar v7.0.0.1121 Enterprise:The Enterprise Company:ACME EQUIPMENT COMPANY (46) Location:SAN ANTONIO (47)

File View Company CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Scheduling Help

RIMSS WinNetStar Opportunity List

Add New Refresh Print Layouts User Reports

Opportunity # Customer
 Category Type

Period
 All From: 1/1/2001 To: 12/31/2099 Fetch

Owner

Inactive	Id	Stage	Customer	Name	Category	Type	Created Date	Lead Source	Estimated Amount	Estimated Close Date	Probability	Note
Owner: Chesnut, Lee												
False	7	Lead	JOHNSON FARMS	Sale of New Trucks to Replace Fleet	Truck	Fleet Purchase	5/29/2013	Cold Call	\$350,000.00	8/31/2013	35.00 %	This customer is needing to replace 5 trucks in their fleet prior to August o
									\$350,000.00			
Owner: TEAGUE, DALE												
False	1	Lead	JOHHSON SUPPLY	TRACTOR SALE	AG	Tractor	4/30/2013	Radio	\$50,000.00	5/11/2013	90.00 %	This is the note
False	2	Qualified	JOHHSON SUPPLY	Cotton Picker Sale	AG	Cotton Picker	5/9/2013	Walk In	\$50,000.00	6/19/2013	50.00 %	Customer wants to buy a used Cotton Picker
False	3	Cancelled	Rogers Cable System	MAXXUM TRACTOR SALE	AG	Combine	5/22/2013	Newspaper	\$125,000.00	7/31/2013	85.00 %	
False	4	Quote	Jean Staples	SALE OF MAGNUM TRACTOR	AG	Tractor	5/28/2013	Newspaper	\$120,000.00	6/26/2013	50.00 %	RECORD NARATIVE HERE
False	5	Quote	ASCO	SALE OF RIMSS SOFTWARE	Truck	Tractor	5/28/2013	Trade Show	\$150,000.00	5/30/2013	95.00 %	TALKED TO CHRIS AT CNH TRADE SHOW AND HE WANTS DEMO
False	6	Quote	Williamson Supply	SALE OF COMBINE	AG	Combine	5/29/2013	Cold Call	\$150,000.00	6/27/2013	50.00 %	John Williamson stated that he would be ready to trade in his existing com
False	8	Lead	JOHHSON SUPPLY	Sale of Tractor			5/29/2013		\$25,000.00		85.00 %	
									\$670,000.00			
									\$1,020,000.00			

[Inactive] = 'False' Edit Filter

Client Desktop User: dale Role: Administrator Workstation: DALEOFFICE Server: V3Demo Database: WinNetStarApp Key Stroke Entry

12:23 PM 5/29/2013

The Opportunity List will initially open blank. Use the pre-fetch filters if needed, set your date range, and click Fetch. In the example below, we have grouped the report based on the Owner (or Salesman) to see all opportunities grouped by the Salesman responsible for the Opportunity. Note that there are menu options in the top left of the screen to Print the report which will produce a print preview similar to other areas of the application. There is also a menu option for User Reports allowing the user access to a custom report writer interface.

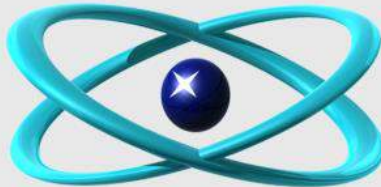
RIMSS.WinNetStar v7.0.0.1121 Enterprise:The Enterprise Company:ACME EQUIPMENT COMPANY (46) Location:SAN ANTONIO (47)

File View Company CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Scheduling Help

RIMSS WinNetStar

- New
 - 1205 Customer
 - 1215 Customer Receipt
 - 1220 Finance Charge
 - 1225 CRM Event Ctrl+E
 - 1230 CRM Opportunity Ctrl+O
- Find
- Support Lists
- Customer Statements

To create a new CRM Event, navigate to CRM>New>CRM Event. Please note that there is also a hot key option to open this form, Ctrl-E.



RIMSS WinNetStar
Advanced Enterprise System

Company: ACME EQUIPMENT COMPANY (46)
Location: SAN ANTONIO (47)

Client Desktop User: dale Role: Administrator Workstation: DALEOFFICE Server: V3Demo Database: WinNetStarApp Key Stroke Entry

2:14 PM
5/29/2013

RIMSS.WinNetStar v7.0.0.1121 Enterprise:The Enterprise Company:ACME EQUIPMENT COMPANY (46) Location:SAN ANTONIO (47)

File View Company CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Scheduling Help

RIMSS WinNetStar CRM Event

Save Save and Close Save and New Refresh Void

General Attachments (0) My Outlook Quote Builder Customer Master Opportunity

Document #: _____ Date: 5/29/2013 2:15 PM Purchase Order: _____
 Salesman: _____ Memo: _____ Opportunity: _____
 Customer: _____ Phone: _____ CRM Event Type: _____

Renameable Fields

Renameable Field	Value
Date	
Lookup	
Yes No	
Alpha	
CRMEventRenameableField5	
CRMEventRenameableField6	

Contacts

Attended	Title	Name	Phone	Fax	Email

Notes:

The new CRM Event will open as a new tab. Select the Salesman and Customer. You may also link this Event to an Opportunity (recommended). The CRM Event Type is a user defined drop down that can be maintained in the CRM Support List menu section. Note the multiple tabs across the top of the CRM Event document where users have access to Microsoft Outlook, the Customer Master, and the Opportunity.

Customer CRM Events

Drag a column header here to group by that column

Document ID	Customer Name	Salesman	Event Date	Event Type	Event Memo	Customer PO	Event Note	Event Contact Names	Attachments	Last Modified By	Last Modified Date

Existing CRM Events will list here.

Client Desktop User: dale Role: Administrator Workstation: DALEOFFICE Server: V3Demo Database: WinNetStarApp Key Stroke Entry _____

2:15 PM 5/29/2013