



Infor SyteLine Sales/CRM User Guide

Copyright © 2013 Infor

Important Notices

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

Trademark Acknowledgements

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

Table of Contents

About Surcharges	1
Surcharge Calculation	1
Reports	1
CRM Overview.....	3
Licensing.....	3
CRM Recommendations Including Order of Events	4
Technical Points	5
CRM Scenarios.....	7
Scenario #1.....	7
Scenario #2.....	7
Scenario #3.....	8
Scenario #4.....	8
Scenario #5.....	9
Scenario #6.....	9
Creating and Managing Opportunities.....	11
Creating an Opportunity	11
Creating an Opportunity Task	11
Commissions Overview	13
Hierarchical Structure.....	13
Setting Up Commission Information.....	13
Processing and Calculating Commissions.....	14
Commissions to Employees.....	15
Commissions to Vendors	15
Commissions Due	15
Altering Calculation Methods.....	16
Creating Sales Forecasts	17
Implementing Surcharges.....	19
Configure Accounting and Tax Records	19
Create Item Contents and Exchanges	19
Create Item Content References.....	19
Establish Surcharge Rules	20
Sending Mass Communications	21
Sending a Communication to a Group of Contacts.....	21
Preliminary Steps	21
Sending an E-mail to Portal Users.....	21
Sending a Fax or Letter to a Group of Contacts.....	22

Sending an E-mail “Blast” to a Group of Contacts.....	23
Inserting MailMerge Fields for SyteLine Contacts	25
Adding MailMerge Fields in a Word Template.....	25
Adding MailMerge Fields in the Communication Wizard Message Area	26
For More Information.....	26
Index	27

About Surcharges

Surcharges allow you to create a more accurate item price by accounting for fluctuating commodity prices. You may apply surcharges to:

- Purchase orders.
- Vouchers.
- Customer orders.
- Invoices.

Surcharge Calculation

An estimate of commodity cost is built into the cost of the item, and is represented by the Base Price field. This formula accounts for market fluctuation, then applies a surcharge based on the amount of the commodity that is contained in the item, as well as a general surcharge factor.

Unit surcharge = (Actual price - Base Price) * Content Factor * Surcharge Factor

Reports

Surcharge information is included on these reports:

- Purchase Order Laser
- Purchase Requisition
- Purchase Order Requisition
- Estimate Response Form
- Order Verification
- Consolidated Invoicing Draft
- Consolidated Invoicing Laser
- Order Invoicing Credit Memo Draft
- Order Invoicing Credit Memo Laser
- Order Invoicing Credit Memo To Be Printed

CRM Overview

CRM is a customer relationship management solution that provides an efficient method for managing the entire sales process within SyteLine, from customer lead origination and sales opportunity tracking through converting prospects to customers and placing the order.

The features in CRM provide an integrated solution between your front and back offices. It delivers productivity gains by streamlining sales and customer service processes, decreasing the cost of sales and cost to serve, and ultimately increasing revenue.

CRM allows you to manage your marketing, sales, order, contact, and customer management activities:

- **Marketing** - Using the **Opportunities** form, your marketing organization can track all elements of a marketing or sales campaign, including its effectiveness. You can also manage all tasks associated with an opportunity using the **Opportunity Tasks** form. Use the **Competitors** form to keep contact information and basic company information of your competitors. Create campaigns with the **Campaigns** form, and add items to the campaign with the **Campaign Items** form. Use the **Campaign Types** and **Campaign Statuses** forms to add further detail to your campaign.
- **Sales** - Using the **Prospects** and **Leads** forms, your sales representatives can assist prospects and customers from initial interest through order placement. They can quickly convert a prospect to a customer. All associated information is automatically transferred to the new customer and opportunity records. They can also organize prospects and customers by **Territories**. Use the **Sales Teams** form to create and manage sales teams for customers, prospects, and opportunities. Use the **Sales Contact Interactions** form to keep track of communications with sales contacts. The **Sales Contacts** form allows you to keep basic information on your sales contacts. Use the **Sales Forecasts** form to keep track of sales forecasts and the **Add Opportunities** form to add opportunities to a sales forecast. Create sales periods with the **Sales Periods** form. The **Prospect Interactions** form and **Customer Interactions** forms allow you to keep track of communications with prospects and customers.
- **Order Management** - The Opportunities form also allows you to track estimate orders assigned to prospects or customers.
- **Customer and Sales Contact Management** - On the **Customers** form, CRM tab you can maintain territory information, the SIC code, company revenue and number of employees for each customer. You can also cross reference your sales contacts with **customers** and **prospects**.

Licensing

Any user with the SyteLineTrans license module can access the CRM forms.

CRM Recommendations Including Order of Events

We recommend that you use CRM in a test environment first so that you become familiar with how it works before using it in your live environment.

Order of events:

- 1 Identify the base values for the various fields on the CRM forms. Several of the CRM forms each have dropdown fields for which values need to be defined. Some are required, and some are optional. If possible, the dropdown values should be set up before importing CRM data or entering any data into these forms (with exception to the Customers form/table which most likely already has data). Those forms that have these dropdown values include: **Leads**, **Opportunities**, **Opportunity Tasks**, **Prospects**, and **Customers**.

When defining the values, it is important to think about how you will use CRM and how you want to track progress on leads and opportunities, as well as tracking other information such as where the lead or opportunity came from, what was the reason for the win or loss, and what types of tasks might there be when working with an opportunity. You also need to decide if you want to track your data by territory. Your Infor Business Partner or the Infor PSO team can assist with defining these values based on the needs of your organization.

NOTE: Although the system won't prevent you from changing the values later, it may be undesirable as it would invalidate any existing records with those values. Scripts could be written though to update any existing records prior to changing the values.

The values that need to be defined include:

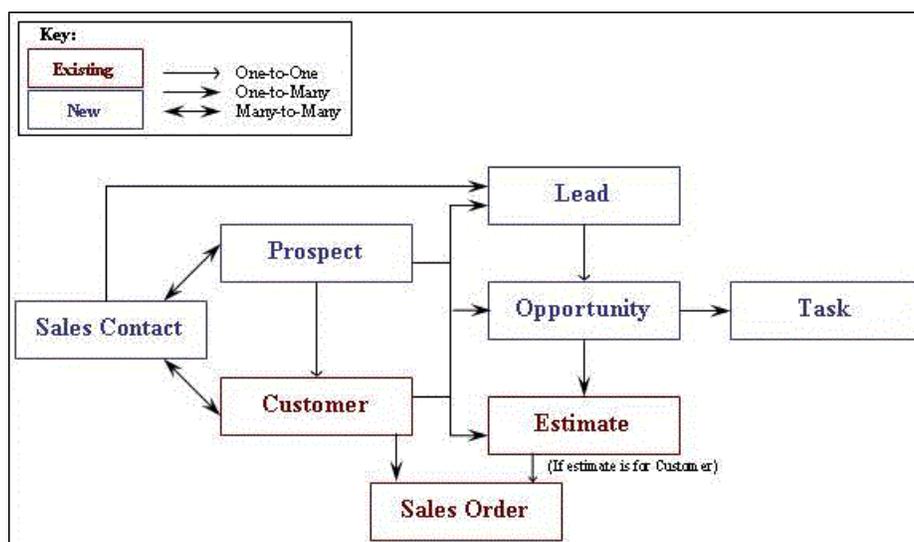
- Lead Statuses (required - **Leads** form)
 - Opportunity Statuses (required - **Opportunities** form)
 - Opportunity Sources (optional - **Leads** and **Opportunities** forms)
 - Opportunity Stages (optional - **Opportunities** form)
 - Opportunity Won Reasons (optional - **Opportunities** form)
 - Opportunity Lost Reasons (optional - **Opportunities** form)
 - Opportunity Task Types (optional - **Opportunity Tasks** form)
 - Territories (optional - **Customers** and **Prospects** forms)
- 2 Enter/import your **Sales Contacts**. You can import contacts from Outlook or set them up manually. If you have the data defined in another database, you may want to create import scripts to import the data. We recommend you contact your Infor Business Partner or Infor PSO to assist with this process.
 - 3 Set up any existing **Prospects** and then cross reference them to your Sales Contacts, using the **Prospect Sales Contact Cross References** form.
 - 4 Cross reference any of your existing customers to the contacts you imported or manually set up. Use the **Customer Sales Contact References** form to complete this.
 - 5 Enter any existing leads, opportunities, opportunity tasks, and quotes that you already have and want to begin tracking. If you need to import these, we recommend you contact your Infor Business Partner or Infor PSO to assist with this process.

6 Begin using CRM.

Technical Points

- When importing/exporting sales contacts from/to Outlook, this is not a synchronization. Records are duplicated if they already exist (in either direction). So, if importing from Outlook, and the contact exists already in CRM, importing it again creates another sales contact record. If exporting to Outlook, if the contact exists already in Outlook, exporting it again creates another Outlook contact.
- When importing/exporting sales contacts from/to Outlook, Outlook must be open. When importing, highlight all contacts in Outlook to be imported. Click the import button to bring over those selected contacts. When exporting, either the selected record in SyteLine or all records will be exported, depending on if you select the Export or Export All button.
- The ability to assign territories is used for tracking purposes only, such as reporting. It does not limit users to only the data in their assigned territories (data is not filtered by territory).
- You can create your own reports with CRM data or export the data to Excel. Your Infor Business Partner or the Infor PSO team can assist with creating reports if this is desired.
- There are pre-defined query forms available under the CRM>Queries folder. These forms allow you to query your campaigns, competitors, sales contacts, sales teams, sales forecasts, prospects, leads, opportunities, and opportunity tasks based on the data of your choice.
- You can generate events against the forms. This can be helpful for things such as managing the progress of opportunities and tasks, following-up on leads or opportunities, etc. For more information on the SyteLine Application Event System, see the *Guide to the Application Event System* on our Support site. If needed, your Infor Business Partner or the Infor PSO team can assist with creating events to meet the needs of your company.

The following chart displays how the CRM components are related to each other:



CRM Scenarios

This topic describes the steps required for different scenarios using the CRM functionality. Some scenarios include using the Microsoft Outlook add-in piece. See the *Infor SyteLine Microsoft Office Integration User Guide* for more information about the Outlook add-in functionality, including any installation information that may be required as mentioned below.

Scenario #1

A customer calls about your new product line. Return the phone call from the prospective customer.

- 1 Create a new contact record on the **Sales Contacts** form. Be sure to set up the preferences on the preferences tab.
- 2 Synchronize with Outlook Contact. For Contacts, Tasks, and Appointments to automatically Sync In or Sync Out, the Auto Sync Out check box must be selected during the initial setup of the Outlook add-In. This is part of the installation for the add-in.
- 3 Create a New Prospect record and tie to the Contact.
 - a Make sure you are added to a team on the **Sales Teams** form.
 - b Create a new prospect on the **Prospects** form.
 - c On the **Prospects** form, click the **Sales Contacts X-Ref** button to open the **Prospect Sales Contact Cross References** form.
 - d On the **Prospect Sales Contact Cross References** form, select yourself as the contact. Save. You should now see yourself listed as a contact on the **Prospects** form.
- 4 On the **Sales Contact Interactions** form, record the content of your phone call. You can also send an e-mail from this form. Change the status on this form to **Complete**.

Scenario #2

A customer is interested in getting more information about your new product line.

- 1 On the **Lead Statuses** form, either create a new lead status or use an existing one.
- 2 On the **Leads** form, create a new lead tied to both the prospect and contact.
- 3 On the **Leads** form, click the Notes button in the toolbar. Add any relevant notes.
- 4 On the **Prospect Interactions** form, set a follow-up date.
- 5 Run the **Prospect Interactions Report**.

Scenario #3

Customer meeting went well. This has now turned into a Sales Opportunity.

- 1 On the **Prospect Interactions** form, record the meeting interaction.
- 2 Create opportunity from lead. On the **Leads** form, click the **Opportunities** button. The **Opportunities** form is displayed.
- 3 On the **Opportunities** form, click the **Tasks** button. The **Opportunity Tasks** form is displayed.
- 4 Use the **Opportunity Tasks** form to record steps that have been agreed upon from meeting
 - a Set up Discovery meeting
 - b Set up Internal Review
 - c Set up follow up demonstration
 - d Put together proposal
 - e Close deal
- 5 Tie opportunity to estimate for proposal. On the **Opportunities** form, click the **Estimates** button. The **Estimates** form is displayed.
- 6 On the **Estimates** form, click the **Estimate Lines** button to open the **Estimate Lines** form so that you can add lines.
- 7 On the **Estimate Response Form Report** form, ensure that **Print Price** is selected. Print the report.
- 8 On the **Competitors** form, create a new competitor or use an existing one.
- 9 On the **Opportunity Competitor Cross References** form, add a record. Competitor now appears on the **Competitors** tab on the **Opportunities** form for that opportunity.
- 10 On the **Opportunity Member Cross References** form, delete or add sales people so that only those sales people working on this opportunity are listed. The sales team members are now visible on the **Team Members** tab on the **Opportunities** form for that opportunity.

Scenario #4

Your manager is requesting a forecast of opportunities.

- 1 Open the **Sales Forecasts** form and select the proper sales period and salesperson.
- 2 On the **Sales Forecasts** form, change the status to **Submitted**.

Scenario #5

The deal has been won.

- 1 Record win information.
 - a On the **Opportunity Won Reasons** form, add a new reason for the win, or plan to use one that exists.
 - b On the **Opportunities** form, set the **Reason Won** field to the proper reason for the proper opportunity.
- 2 Move the prospect to a live customer.
 - a On the **Prospects** form, click the **Move To Customer** button for the proper prospect. The **Move Prospect To Customer** form is displayed.
 - b On the **Move Prospect To Customer** form, select the proper bank code and click **Process**.
 - c Check the **Customers** form to ensure the customer record has been created.

Scenario #6

Create and manage a campaign.

- 1 Create Sales Contact Group. On the **Sales Contact Groups** form, add your contact to the Trade Show group.
- 2 On the **Campaigns** form, create the campaign.
- 3 On the **Campaigns** form, click the **Add Sales Contacts** button. The **Add Sales Contacts** form is displayed.
- 4 On the **Add Sales Contacts** form, select **Sales Contact Group** in the **Source** field.
- 5 Click the **Filter In Place** button so that you see **Trade Show** in the **Group Name** column.
- 6 With the Trade Show group name selected, click **Next**.
- 7 Select the contacts you want to include and click **Finish**. You can now see the contacts on the **Contacts** tab of the **Campaigns** form.
- 8 On the **Campaigns** form, click the **Campaign Items** button. The **Campaign Items** form is displayed.
- 9 On the **Campaign Items** form, select all the items for your campaign. The items now appear on the Campaign Items tab of the **Campaigns** form.
- 10 On the **Campaigns** form, click the **Send Communications** button. The **Communication Wizard** is displayed.
- 11 On the **Communication Wizard** form, set the Communication Type to **Promotion** and the Communication Method to **E-mail**.
 - a Click **Next**. Select your sales contacts for the communication.

- b** Click **Next**. Create your template.
 - c** Click **Next**. Select the topic, the type, provide any notes you want, and select any other options you want.
 - d** Click **Finish**. Communications now appear on the **Communications** tab on the **Campaigns** form.
- 12** On the **Campaigns** form, click the **Leads** button. The **Leads** form is displayed.
- 13** Create the lead and save. The lead now appears on the **Leads** tab of the **Campaigns** form.

Creating and Managing Opportunities

An opportunity is an event with associated tasks for a prospect or customer. Using the CRM Opportunity forms, you can create and track activities that engage prospects and retain customers.

Before you create an opportunity and its associated tasks, set up information in these forms:

- Opportunity Sources
- Opportunity Statuses
- Opportunity Stages
- Opportunity Lost Reasons
- Opportunity Won Reasons
- Opportunity Task Types

Creating an Opportunity

To create an opportunity:

- 1 On the Opportunities form, select **Actions > New**.
- 2 Enter a number in the Opportunity field, or let the system choose a number for you when you save the record.
- 3 Select a customer or a prospect. A territory displays if it has been assigned.
- 4 You may assign a salesperson or a contact to the opportunity.
- 5 Select the initial status of the opportunity from the Status field.
- 6 On the General tab, enter the Estimated Value, the percentage chance the opportunity will be won, and Projected Close Date.
- 7 Select **Actions > Save** to save the opportunity.

Throughout the course of the opportunity, you can update the status, stage, percent of success, and completion date. You can also indicate the reason the opportunity was won or lost.

Creating an Opportunity Task

Once you have saved the opportunity, you can create tasks for it using the Opportunity Tasks form.

To create a task:

- 1 On the Opportunity Tasks form, select **Actions > New**.

- 2 The system automatically assigns the **Task** number. Enter a description of the task.
- 3 Select the **Type** of task.
- 4 Since, it is a new task, keep the **Status** as **Open**.
- 5 Select a task **Owner**. This list is obtained from the system users.
- 6 Select the task's **Priority** - Low, Medium, or High.
- 7 Enter the **Due Date** for completing the task.
- 8 To indicate the task is required, select the **Mandatory** check box.
- 9 After the task is completed, enter the completion date.
- 10 Select **Actions > Save** to save the opportunity. The system displays the **Create Date**. The ID of the person who created the task displays in the **Created By** field.

Commissions Overview

The system allows you to set up and process various levels of salespersons and their respective commissions based upon these levels. It is possible to apply various commission rates to each salesperson, at each level, with this function. Additionally, commission payments can be calculated on partial as well as full invoice payments.

Hierarchical Structure

To process commissions using a hierarchical structure, you should understand the structure involved. For example, the following diagram shows a typical salesperson/commission structure.

(5%) (6%) (4.5%) (4.8%) (7%)

This diagram shows that the National Sales Manager receives 2% of all invoices generated, the Eastern Sales Manager receives 4% of all invoices generated by the salespersons whom he manages, and the Western Sales Manager receives 4.2% of invoices generated by the salespersons whom he manages. Each of the salespersons receives the indicated percentage of commission.

Setting Up Commission Information

To process salesperson commissions in a hierarchical structure, you must set up several codes and parameters based on salesperson classification, commission percentage, and the selected commission payment plan. The following steps identify what to set up for processing salesperson commissions in a hierarchical structure. If you do not use a hierarchical structure, complete all steps shown, but leave the **Sales Manager** field of the **Salespersons** form blank.

- 1 Create geographical, positional, or other classifications for salespersons using the **Salesperson Classifications** form.
- 2 Enter all salespersons into the **Salespersons** form.
- 3 Enter commission values for salespersons, using the **Commissions Table Maintenance** form.
- 4 If the commission is to be paid when the invoice is paid or after invoicing, select the **Commission Due on Payment** check box on the **Order Entry Parameters** form.

Processing and Calculating Commissions

After you have set up all forms used for calculating commissions, the system is ready to process commissions. After customer invoices are posted, the system follows the following rules to calculate the commission amounts due:

1 When the invoice is posted:

- If the **Commission Due on Payment** check box is selected on the **Order Entry Parameters** form, the system generates commissions due records only when customer orders are invoiced, and based on what the customer actually pays.
- If **Commission Due on Payment** check box is cleared, the total commission amount due is recorded at this time.

2 When payment is received from the customer, the system calculates the commission due each salesperson for each invoice as follows:

- The percentage paid of the total invoice is calculated using the following formula. This allows commissions to be calculated on partial payment of invoices.

$$PP = AP/IT$$

where:

PP = Percentage Paid

AP = Amount of Payment

IT = Invoice Total

- The percentage of commission due to each salesperson is determined using the following formula:

$$PCD = PPI * SCP$$

where:

PCD = Percentage of Commission Due

PPI = Percentage Paid of Invoice

SCP = Salesperson's Commission percent

- The commission amount due to each salesperson is determined using the following formula:

$$CAD = PCD * IT$$

where:

CAD = Commission Amount Due

PCD = Percentage of Commission

IT = Invoice Total

3 Because the system allows various levels of salespersons, a special process is followed to create the commission due listed above for each salesperson. In order to process the commission due, the commissions function performs the following steps:

- The system refers to the **Salespersons** form for the salesperson listed on the invoice and calculates the percentage and commission due to that salesperson (as shown above).
- Next, the system refers to the **Sales Manager** field in the **Salespersons** form, and calculates the percentage due for the sales manager (if the **Sales Manager** field contains a salesperson's initials.)
- If a number exists in the **Sales Manager** field of the **Salespersons** form, the commission is calculated for that manager.

This process continues higher up the chain of command until a blank **Sales Manager** field is encountered. This allows commission payments to be given to a salesperson, as well as all managers higher in the hierarchy for any invoice.

Commissions to Employees

Salespersons who are considered employees of the company (indicated by the **Outside** check box being cleared on the **Salespersons** form) are paid commissions based upon their **Employees** record. When payroll is processed and it is time to pay the salesperson, depending on whether the salesperson is paid biweekly, weekly, monthly, or whatever, the commissions are totaled and paid.

When the **Salespersons** file is set up, the **Deductions & Earnings** code under which the commissions are reported is recorded for each salesperson. When payroll is generated, the system selects all commission due records that contain information relating to the invoice number, salesperson, and commission amount due for each customer payment processed.

The system then totals these records, and displays the total commission paid in the specified **Deductions & Earnings Code** field indicated for each salesperson. This commission amount is paid when payroll checks are printed.

Commissions to Vendors

Salespersons who are not considered employees of the company (indicated by the **Outside** check box on the **Salespersons** form being selected) are paid commission when accounts payable payment processing occurs. This type of salesperson is paid when a commission becomes due (meaning, a **Commissions Due** record has been created) and payments are processed through Accounts Payable.

Processing commissions for these salespersons works the same as for employees of the company. The system looks at commission due records for the salesperson (vendor), calculates the total commission due to the salesperson, and that amount is then paid when disbursements are generated.

Commissions Due

Commission due records are not deleted when commissions are paid, but rather are marked as paid. Therefore, by using the **Commissions Due** form, you can adjust commissions that are due.

Altering Calculation Methods

Currently, commission percents are calculated both by salesperson and product code, as defined in the **Commission Table Maintenance** form. However, the commission calculations may be customized to fit the needs of the company.

Creating Sales Forecasts

- 1 On the Sales Forecasts form, select **Actions > New**.
- 2 The Salesperson field toward the top of the form defaults to the current salesperson (you).
- 3 Choose the sales period.
- 4 Save the record.
- 5 After you save the record, the Add Opportunities button appears on the form. If you click this button, the Opportunities form opens, allowing you to add opportunities to the sales forecast for the current salesperson (if opportunities exist for the salesperson).

Implementing Surcharges

Before you can begin applying surcharges, you must configure the system.

Configure Accounting and Tax Records

- 1 On the Chart of Accounts form, create a Surcharge and, if necessary, Surcharge in Process account.
- 2 On the Accounts Payable Parameters and Accounts Receivable Parameters forms, accept the default surcharge factor of 1.00, or specify a new factor.
- 3 Specify the surcharge account(s) on the A/P Parameters, A/R Parameters, Distribution Accounts, and End User Types forms.
- 4 On the Tax Systems form, specify the surcharge tax code label and description.
- 5 On the Tax Codes form, use the Include Surcharge field to specify the tax codes that will include surcharges when determining the basis for tax charges.

Create Item Contents and Exchanges

- 1 On the Item Contents form, create records for each commodity for which you might apply surcharges.
- 2 On the Item Content Exchanges form, create a record for each commodities exchange service from which you might buy your item contents.
- 3 On the Item Content Prices form, create records to track the price fluctuations of each item content, and each exchange.
- 4 On the Items form, specify that an item contains some amount of item content by selecting the Includes Item Content field on the Sales tab.

Create Item Content References

- 1 On the Items form, click the Item Content button to open the Item Content References form.
- 2 Define the item content reference. This will apply to all uses of this item.
- 3 Specify the effective date, base price, and content factor for each item content contained within the referenced item.

- 4 (optional) To specify a unique reference for an individual customer, vendor, contract, or order line, click the Item Content button on those forms. References created this way will take precedence over the references created for the item in general.

Establish Surcharge Rules

- 1 On the Customer Surcharge Rules and Vendor Surcharge Rules forms, create a record for each customer/exchange or vendor/exchange combination.
- 2 For each record, define the price method, offset intervals (where applicable), and start/end date times (where applicable).

Sending Mass Communications

Sending a Communication to a Group of Contacts

You can use the Communication Wizard to send a communication to a group of contacts. This topic includes this information:

- [Preliminary Steps](#)
- [Sending an E-mail to Portal Users](#)
- [Sending a Fax or Letter to a Group of Contacts](#)
- [Sending an E-mail "Blast" to a Group of Contacts](#) (with or without a template)

For additional information about MailMerge and SyteLine, see [Inserting MailMerge Fields for SyteLine Contacts](#). That topic applies both to communications that use a template and those that do not use a template.

Preliminary Steps

Start with these steps for any type of communication:

- 1 Decide on the type of communication you plan to send: News, Promotion, or Other Communication.
- 2 Decide on the method of communication you plan to send: Fax, E-mail, or Letter. (If you plan to communicate with Portal users, only e-mail is available, and the rest of these preliminary steps do not apply; see [Sending an E-mail to Portal Users](#).)
- 3 Use the Contact Groups form to create a group of contacts for this communication, if no existing group meets your needs.
- 4 Ensure that the contacts to whom you want to send the communication are signed up to accept that type and method of communication from you. Go to the Sales Contacts form, Preferences tab, and verify the settings for each contact.
- 5 Open the Communication Wizard form and continue with the appropriate steps:
 - [Sending a Fax or Letter to a Group of Contacts](#)
 - Sending an E-Mail Blast to a Group of Contacts

Sending an E-mail to Portal Users

- 1 Determine the type of communication you plan to send: News, Promotion, or Other Communication.

- 2 In the Communication Wizard, select **Portal Users**. The Communication Method defaults to **E-mail**. The list of portal users who will receive the communication is based on those who have subscribed to the publication SpecialPromotionsAnnouncements through their portal profile.
- 3 Type your message in the Message body. Templates and MailMerge fields are not available for use with Portal communications.
- 4 Specify the Subject.
- 5 Click **Next**.
- 6 Select an Interaction Topic and, optionally, specify a note about the interaction. The Type defaults to **E-mail**.
- 7 Click **Finish**. The system sends the e-mail to portal users through the Application Event System.

Sending a Fax or Letter to a Group of Contacts

- 1 Follow the [Preliminary Steps](#).
- 2 If you are using a template, ensure that you have created a Word template appropriate for this communication, with MailMerge fields embedded. See [Inserting MailMerge Fields for SyteLine Contacts](#).
- 3 In the Communication Wizard, specify the Communication Type.
- 4 Specify the Communication Method as **Fax** or **Letter**.
- 5 Select the group you defined in the [Preliminary Steps](#).
- 6 Click **Next**. The contacts from the group who have specified that they want to receive this type and method of communication are listed.
- 7 Select the contacts that you want to include in this communication.
- 8 Click **Browse** and select the template you defined in step 2.
- 9 The system responds by creating a .csv file that contains one record for each contact, with the available MailMerge field values for that contact. You are prompted to open the file. If you want to verify the values, click **Yes**. Close the file when you are finished.
- 10 The text from the template, including the MailMerge fields, is displayed in the Message field. You cannot edit the text.
- 11 Click **Next**. A Microsoft Word file is created that includes one copy of the merged document for each contact.
- 12 Print the document.
- 13 Click **Finish** to close the **Communication Wizard**.
- 14 Fax or mail the printed documents to the individual contacts.

Sending an E-mail “Blast” to a Group of Contacts

You can use the SyteLine MailMerge fields either in a template or in a simple text message.

Using a MailMerge Template with HTML Formatting

If you specify a Microsoft Word template (using either of the file extensions .docx or .dotx) and use MailMerge, your e-mail is sent through your installation of Microsoft Outlook. The e-mail is created as an HTML document with merge fields embedded in it. Use these steps:

- 1 If you want to send these e-mail blasts from a special “Marketing” e-mail address rather than from your personal address, add the Marketing e-mail account to your Outlook Profile and temporarily set that profile as the default.
- 2 Ensure that you have created a Word template appropriate for this communication, with MailMerge fields embedded. See [Inserting MailMerge Fields for SyteLine Contacts](#).
- 3 Follow the [Preliminary Steps](#).
- 4 In the Communication Wizard, specify the Communication Type.
- 5 Specify the Communication Method as **E-Mail**.
- 6 Select the group you defined in the [Preliminary Steps](#).
- 7 Click **Next**. The contacts from the group who have specified that they want to receive this type and method of communication are listed.
- 8 Select the contacts from the group to be included in this communication and click **Next**.
- 9 Click **Browse** and select the template you defined in step 2.
- 10 The system responds by creating a .csv file that contains one record for each contact, with the available MailMerge field values for that contact. You are prompted to open the file. If you want to verify the values, click **Yes**. Close the file when you are finished.
- 11 The text from the template, including the MailMerge fields, is displayed in the Message field. Do not edit the Message text in the form.
- 12 Specify a Subject for the communication.
- 13 Click **Next**.
- 14 The E-mail Blast populates the Word template with data from your selected contacts and e-mails each record separately from your Outlook profile. Sent e-mails can be viewed in your Outlook Sent Mail folder
- 15 In the **Communication Wizard**, log information about the communication. See the field descriptions for more information:
 - Topic
 - Type
 - Save to Sales Contact
 - Note
 - Show Content

16 Click **Finish** to save the log information.

Sending a Blast E-mail without a Template

You can also send an e-mail that is either basic text formatting or HTML, typed directly into the **Communication Wizard** form, and *not* using a template. Blast e-mails that do not use a template are sent out through the application event system.

To set up this type of e-mail:

- 1 If you want to type HTML formatted text into the Communication Wizard form, ensure that these event handlers are updated to allow HTML:
 - In the **Event Handlers** form, select **GenericSendEmail**. Click **Event Actions**. Click **Edit Parameters**. Ensure that **Body is in HTML Format** is selected and click **OK**.
 - Return to **Event Handlers** and repeat the above step for the **GenericNotify** and **InteractionEmail** events.
- 2 Follow the [Preliminary Steps](#).
- 3 In the Communication Wizard, specify the Communication Type.
- 4 Specify the Communication Method as **E-Mail**.
- 5 Select the group you defined in the [Preliminary Steps](#).
- 6 Click **Next**. The contacts from the group who have specified that they want to receive this type and method of communication are listed.
- 7 Select the contacts from the group to be included in this communication and click **Next**.
- 8 Type a Subject and enter your text in the Message field. You can include SyteLine MailMerge fields (see [Inserting MailMerge Fields for SyteLine Contacts](#)). If HTML is allowed (see step 1), you can type in basic HTML formatting such as **text** in your message text.
- 9 Click **Next**.
- 10 In the **Communication Wizard**, log information about the communication. See the field descriptions for more information:
 - Topic
 - Type
 - Save to Sales Contact
 - Note
 - Show Content
- 11 Click **Finish** to save the information.

Inserting MailMerge Fields for SyteLine Contacts

These contact fields are available for use in MailMerge documents:

first_name
middle_initial
last_name
suffix
job_title
address_1
address_2
address_3
address_4
city
state
zip
country
business_phone
mobile_phone
email
fax

Adding MailMerge Fields in a Word Template

You cannot paste or type these fields into a template. They must be added using the MailMerge functionality in Microsoft Word. In Microsoft Word 2010, these are the steps to add the fields:

- 1 Open a new document.
- 2 Click **Insert > Quick Parts > Field**.
- 3 Select **MergeField** from the list of field names.
- 4 Under field properties, type in the SyteLine field name from the list, for example **first_name**. (Word will place the field inside special characters.)
- 5 Click **OK** to insert the merge field.

In other versions of Word, the steps might be different.

EXAMPLE: An example template that uses the SyteLine MailMerge fields is available through the knowledge base on our Support site. Search for a KB article containing the text "**SyteLine MailMerge Email Merge Template**".

Adding MailMerge Fields in the Communication Wizard Message Area

If you are creating a simple e-mail without a template, type the text of your message into the Message field in the Communication Wizard. When you reach a point where you want to insert a MailMerge field, follow these steps:

- 1 Select a field in the Merge Field dropdown. A variable representing this selection is placed on the clipboard.
- 2 Place the cursor in the Message box.
- 3 Type **Ctrl + V** to insert the variable at the cursor location.
- 4 Continue composing the message.
- 5 When the communication is sent, all variables you placed are replaced with the appropriate data.

EXAMPLE: You are sending an e-mail to two prospects, Joe and Jane, and you want to personalize the message. Select First Name in the Merge Field dropdown, then paste the variable into the message opening. The message now begins, "Dear {@FirstName}". When the message is sent, the variable is replaced and the messages read, "Dear Joe" and "Dear Jane."

For More Information

The help topic [Sending a Communication to a Group of Contacts](#) contains additional information about how to use MailMerge templates in SyteLine.

Index

C

commissions	
calculating and processing.....	13
changing calculation methods.....	13
overview	13
setting up	13
Communication Wizard, how to use	21
CRM overview.....	3
CRM scenarios.....	7

H

hierarchical structure, processing	
commissions.....	13

M

MailMerge fields, examples.....	25
MailMerge, how to use in SyteLine	21
mass communication to a group of contacts	21

O

opportunities, managing	11
-------------------------------	----

S

Sales Forecasts, Creating	17
surcharges	
about	1
setting up.....	19