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# Chapter 1

## About This Guide

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This guide is for the CRM Implementer. We assume that you have:

- Windows NT/Windows 2000 implementation and support skills.
- IIS (Internet Information Server/Personal Web Server) knowledge.
- Experience in implementing and supporting relational databases.
- Understanding of concepts of SQL views, tables, databases, data relationships, and normalization.

### How this Guide is Organized

This guide documents User Interface Screens and Lists that are commonly customized in CRM. The guide can be used as a template for implementation customization work—either in this document, or by copying and pasting into your design specification documents.

It is recommended that you carry out the screen and list customization work in tandem with the field and data definition work, using the *Data Management Forms*.

### Related Information

Please refer to the *User Guide* for information on how the standard fields are used.

Please refer to the *System Administrator Guide* for information on how to customize Screens and Lists.

Please refer to the *Data Management Forms* for field and drop-down list definitions.



# Chapter 2

## Screen and List Customization

---

This chapter documents the commonly customized screens and lists within CRM in the following areas:

- Company and Contact Information.
- Communication Information Management.
- Lead Information Management.
- Marketing Campaign Information Management.
- Opportunity Information Management.
- Case Information Management.

# Company and Contact Information Management

## Company Screen Layout

### Company Search Screen

The screenshot shows a search window titled "Find" with a search button and a "--No Search--" dropdown. The search criteria are organized into three columns:

- Column 1:** Company Name (text input), Business E-mail (text input), Type (dropdown menu with "--All--" selected), and Account Manager (text input with a search icon and a dropdown menu with "--All--" selected).
- Column 2:** Area Code (text input), City (text input), and Status (dropdown menu with "--All--" selected).
- Column 3:** Employees (dropdown menu with "--All--" selected), Zip Code (text input), and Territory (dropdown menu with "--All--" selected).

### Required Modifications

Field	Modification
Company Name	
Area Code	
Employees	
Business E-mail	
City	
Zip Code	
Type	
Status	
Territory	
Account Manager	

### New Fields to be added to this screen

Field	Position on Screen

### Company Entry Screen

Company			
Company Name: <input type="text"/> *	Type: <input type="text" value="--None--"/>	SLA: <input type="text" value="--None--"/>	Website: <input type="text" value="http://"/>
Status: <input type="text" value="Active"/>	Segment: <input type="text" value="--None--"/>	Employees: <input 20")"="" type="text" value("&lt;=""/>	Revenue: <input type="text" value="--None--"/>
Source: <input type="text" value="Phone"/>	Territory: <input type="text" value="Default"/>	Account Manager: <input type="text"/> System Administrator	Mail Restriction: <input type="text" value="--None--"/>

### Required Modifications

Field	Modification
Company Name	
Type	
SLA	
Website	
Status	
Segment	
Employees	
Revenue	
Source	
Territory	
Account Manager	
Mail Restriction	

### New Fields to be added to this screen

Field	Position on Screen

### Company Summary Screen

This screen is the Company panel on the Person Summary page. This is the only place it is displayed in CRM (not to be confused with the Company panel on the Company Summary page).

Company ▶			
<b>Company Name:</b> Design Right Inc.	<b>Type:</b> Prospect	<b>SLA:</b>	<b>Website:</b> <a href="http://www.dri.com">http://www.dri.com</a>
<b>Status:</b> Active	<b>Segment:</b> Professional Services	<b>Employees:</b> 21 - 50	<b>Revenue:</b> \$1M - \$5M
<b>Source:</b> Phone	<b>Territory:</b> US East	<b>Account Manager:</b> Susan Maye	<b>Mail Restriction:</b> No

### Required Modifications

Field	Modification
Company Name	
Type	
Status	
Source	
Region	
Segment	
Website	
Territory	

### New Fields to be added to this screen

Field	Position on Screen

### Company Marketing Box

**Marketing Information**

CRM Solution Implemented:

IT Budget:  Preferred Database:

Current Supplier:  Current Supplier Description:

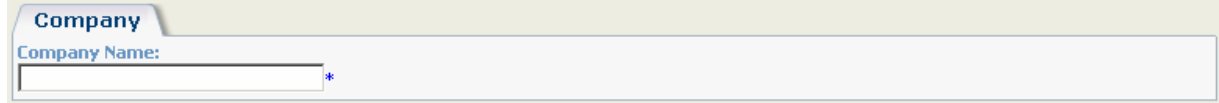
### Required Modifications

Field	Modification
CRM Solution Implemented	
IT Budget	
Preferred Database	
Current Supplier	
Current Supplier Description	

### New Fields to be added to this screen

Field	Position on Screen

### Company Dedupe Search Screen



The screenshot shows a software interface with a light green header bar containing the word "Company". Below the header is a search area with the label "Company Name:" and a text input field. The input field has a small asterisk "\*" at its right end, indicating a required field.

### Required Modifications

---

Field	Modification
Company Name	

---

### New Fields to be added to this screen

---

Field	Position on Screen

---

### Company Top Content



### New Fields to be added to this screen

---

Field	Position on Screen

---

## Company List Layout

### Company Grid

Company Name	City	Phone	Business E-mail	Website	Territory
<a href="#">3G Homes</a>	BRACKNELL	44 1344 897 8791		<a href="http://www.3GHomes.co.uk">http://www.3GHomes.co.uk</a>	U.K.
<a href="#">A Midland &amp; Sons</a>	READING	44 1473 894 8181	<a href="mailto:info@AMidland.co.uk">info@AMidland.co.uk</a>	<a href="http://www.AMidland.co.uk">http://www.AMidland.co.uk</a>	U.K.
<a href="#">A Post</a>	LONDON	44 207 894 1567	<a href="mailto:info@APost.co.uk">info@APost.co.uk</a>	<a href="http://www.APost.co.uk">http://www.APost.co.uk</a>	U.K.
<a href="#">A&amp;W Services</a>	Phoenix	1 602 766 1182	<a href="mailto:info@AWServices.com">info@AWServices.com</a>	<a href="http://www.AWServices.com">http://www.AWServices.com</a>	US West
<a href="#">A.B.B. (Hellas) Systems Ltd</a>	GLASGOW	44 141 890 2344		<a href="http://www.ABBHellas.co.uk">http://www.ABBHellas.co.uk</a>	U.K.
<a href="#">A.I.G. Office (UK) Ltd</a>	LONDON	44 207 887 9567	<a href="mailto:info@AIGOffice.co.uk">info@AIGOffice.co.uk</a>	<a href="http://www.AIGOffice.co.uk">http://www.AIGOffice.co.uk</a>	U.K.
<a href="#">A.T.M. Intercapital</a>	SWINDON	44 1793 885 2567		<a href="http://www.ATMIntercapital.co.uk">http://www.ATMIntercapital.co.uk</a>	U.K.
<a href="#">Aaxxell Interavtive</a>	LONDON	44 1902 875 4524	<a href="mailto:info@AaxxellInteravtive.co.uk">info@AaxxellInteravtive.co.uk</a>	<a href="http://www.AaxxellInteravtive.co.uk">http://www.AaxxellInteravtive.co.uk</a>	U.K.
<a href="#">AB McAlpine</a>	LONDON	44 208 871 6567	<a href="mailto:info@ABMcAlpine.co.uk">info@ABMcAlpine.co.uk</a>	<a href="http://www.ABMcAlpine.co.uk">http://www.ABMcAlpine.co.uk</a>	U.K.
<a href="#">ABB Nicholas</a>	HOUNSLOW	44 208 865 3467	<a href="mailto:info@ABBNicholas.co.uk">info@ABBNicholas.co.uk</a>	<a href="http://www.ABBNicholas.co.uk">http://www.ABBNicholas.co.uk</a>	U.K.

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
City		Y/N		Y/N	C/L/R	Y/N	Y/N
Phone		Y/N		Y/N	C/L/R	Y/N	Y/N
Business E-mail		Y/N		Y/N	C/L/R	Y/N	Y/N
Website		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N

My Dashboard Company List

Company Name	Person
<a href="#">A Post</a>	<a href="#">Clive Stevens</a>
<a href="#">Design Right Inc.</a>	<a href="#">Arthur Browne</a>
<a href="#">Gatecom Inc.</a>	<a href="#">Simon Yaltoy</a>
<a href="#">York Group Network</a>	<a href="#">Khurram Couper-Johnson</a>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Person		Y/N		Y/N	C/L/R	Y/N	Y/N

### Company Dedupe List

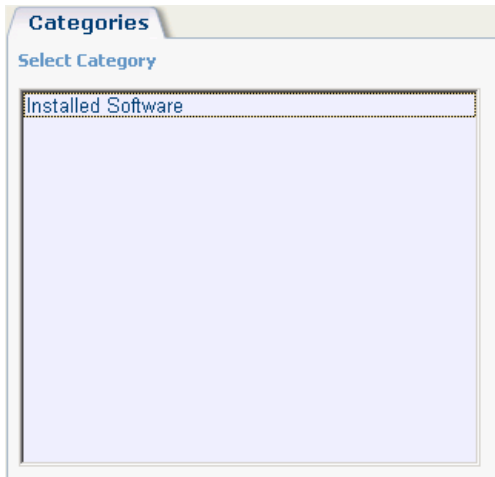
Company Name	Address 1	City	Number	Business E-mail	Person
<a href="#">Design Access</a>	1201 W Peachtree St Nw	Atlanta	881 6437		Dale Osmon
<a href="#">Design Right Inc.</a>	100 Pennsylvania Plaza	New York	736-4430	<a href="mailto:info@dri.com">info@dri.com</a>	Arthur Browne
<a href="#">Hampden Designs Ltd.</a>	Surrey Technology Centre	GUILDFORD	870 2851		Colin Squires
<a href="#">O'Sullivan Design</a>	Virginia Road		82556		John Keenan

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Address 1		Y/N		Y/N	C/L/R	Y/N	Y/N
City		Y/N		Y/N	C/L/R	Y/N	Y/N
Number		Y/N		Y/N	C/L/R	Y/N	Y/N
Business E-mail		Y/N		Y/N	C/L/R	Y/N	Y/N
Person		Y/N		Y/N	C/L/R	Y/N	Y/N

## Key Attributes Screen for Companies

You can remove this tab from Administration | Customization | Company | Tab, and select the Company Tab Group hyperlink.

You can customize the content of this tab from Administration | Advanced Customization | Key Attributes.



### Required Modifications

Category	Modification
Installed Software	

### New Categories to be added to this screen

Category

## Company Summary Report

You can customize the header area of the Company Summary Report output, and also the layout of the Cases, Communications, and Opportunities list.

Company Summary - Design Right Inc.							
Company Name	Design Right Inc.	Type	Prospect				
Segment	Professional Services	Employees	21 - 50				
Revenue	\$1M - \$5M	Region	US East				
Person	Arthur Browne	Address 1	100 Pennsylvania Plaza				
Business E-mail	arthurb@dri.com	Address 2					
Phone	1 212 736-4440	City	New York				
Fax Number	1 212 736-4431	Country	United States				
<b>Cases</b>							
Status	RefId	Opened	Priority	Person	Description	Assigned To	Stage
In Progress	3-20	12/03/2004 13:55	Normal	Arthur Browne	Setup not working	Graham Rogers	Logged
In Progress	S-10030	02/18/2004 16:10	High	Reg Barrow	Faulty report	Graham Rogers	Logged
In Progress	1-10043	03/18/2004 16:10	Low	Reg Barrow	Incorrect user license error	Sylvia Ward	Logged
In Progress	S-10056	07/13/2004 17:45	Normal	Reg Barrow	Crash on startup	Sylvia Ward	Investigating
In Progress	S-10079	14/11/2004 10:25	High	Reg Barrow	Access violation 2 users running report	Sylvia Ward	Queued
<b>Communications</b>							
Action	Date / Time	Person	Details	User	Status		
Meeting	30/09/2004 21:00	Reg Barrow	Meeting with Reg - possible next steps discussion	John Finch	Pending		
Letter Out	21/10/2004 14:25	Arthur Browne	Sent proposal	Susan Mays	Complete		
Phone Out	21/10/2004 14:50	Arthur Browne	Initial contact attempt with Arthur Browne of DRI. Spoke to his team leader and they do have a project and would be interested in discussing it	Susan Mays	Complete		
Meeting	24/10/2004 10:25	Arthur Browne	Call to introduce myself	Tim McCrow	Pending		
Phone Out	25/11/2004 13:25	Arthur Browne	Follow Up with Arthur when he returns from vacation to see what he thought of the proposal	Susan Mays	Pending		
Meeting	28/11/2004 13:30	Reg Barrow	call re outstanding bill	Susan Mays	Pending		
Meeting	24/11/2004 21:00	Reg Barrow	Meeting with Reg - possible next steps discussion	John Finch	Pending		
<small>Company Summary - Design Right Inc.</small>							

### Company Report Summary Screen

To customize the header information of the Company Summary Report, select Administration | Customization | Company | Screens and select the Company Report Summary screen.

Company Name	Design Right Inc.	Type	Prospect
Segment	Professional Services	Employees	21 - 50
Revenue	\$1M - \$5M	Region	US East
Person	Arthur Browne	Address 1	100 Pennsylvania Plaza
Business E-mail	arthurb@dri.com	Address 2	
Phone	1 212 736-4440	City	New York
Fax Number	1 212 736-4431	Country	United States

### Required Modifications

Field	Modification
Company Name	
Type	
Segment	
Employees	
Revenue	
Region	
Person	
Address 1	
Business E-mail	
Address 2	
Phone	
City	
Fax Number	
Country	

**New Fields to be added to this screen**

Field	Position on Screen

### Company Summary Report Cases

To customize the layout of the Cases list on the Company Summary Report, select Administration | Customization | Company | Summary Report and select the Cases hyperlink.

**Cases**

Status	RefId	Opened	Priority	Person	Product	Description	Assigned To	Stage
In Progress	0-20	12/03/2003 13:53	Normal	Arthur Browne		Setup not working	Graham Rogers	Logged
In Progress	5-10020	22/10/2003 15:10	High	Hsg Barrow		daily report	Graham Rogers	Logged
In Progress	1-10045	22/10/2003 15:10	Low	Hsg Barrow		incorrect user license error	Kyle Ward	Logged
In Progress	5-10058	09/11/2003 17:45	Normal	Hsg Barrow		Crash on startup	Kyle Ward	Investigating
In Progress	5-10079	14/11/2003 10:28	High	Hsg Barrow		Access violation 2 users running report	Kyle Ward	Logged

### Required Modifications

Column	Modification
Status	
RefId	
Opened	
Priority	
Person	
Product	
Description	
Assigned To	
Stage	

### Company Summary Report Communications

To customize the layout of the Communications list on the Company Summary Report, select Administration | Customization | Company | Summary Report and select the Communications hyperlink.

#### Communications

Action	Date / Time	Person	Details	User	Status
Call Log	21/10/2003 14:25	Arthur Browne	sent proposal	Susan Maye	Complete
Phone Call	21/10/2003 14:50	Arthur Browne	initial contact attempt with Arthur Browne of LRE. Spoke to his team leader and they do have a project and would be interested in discussing it.	Susan Maye	Complete
Meeting	24/10/2003 10:25	Arthur Browne	call to introduce myself	Tim Macfraw	Pending
Phone Call	05/11/2003 13:25	Arthur Browne	Follow Up with Arthur when he returns from vacation to see what he thought of the proposal	Susan Maye	Pending
Meeting	08/11/2003 13:30	Reg Barrow	call re outstanding bill	Susan Maye	Pending

### Required Modifications

Column	Modification
Action	
Date / Time	
Person	
Details	
User	
Status	

### Company Summary Report Opportunities

To customize the layout of the Opportunities list on the Company Summary Report, select Administration | Customization | Company | Summary Report and select the Opportunities hyperlink.

#### Opportunities

Status	Description	Person	Product	Opened	Stage	Priority	Assigned To
In Progress	Business plan complete	Paula Brown	Expense Check	11/01/2003 12:24	Opportunity	Normal	Summary

### Required Modifications

Column	Modification
Status	
Description	
Person	
Product	
Opened	
Stage	
Priority	
Assigned To	

## Person Screen Layout

### Person Search Screen

The screenshot shows a search form titled "Find" with a search button and a "--No Search--" dropdown. The form contains the following fields:

- Last Name:
- Area Code:
- City:
- Account Manager:  --All--
- First:
- Number:
- Zip Code:
- Company Name:
- Business E-mail:
- Territory: --All--

### Required Modifications

Field	Modification
Last Name	
First	
Company Name	
Area Code	
Number	
Business E-mail	
City	
Zip Code	
Territory	
Account Manager	

### New Fields to be added to this screen

Field	Position on Screen

Person Entry Screen

Person		Salutation:	Type
Last Name: *	First: *	--None--	Admin <input type="checkbox"/>
Middle:	Suffix:	Gender: --None--	Finance <input type="checkbox"/>
Title Code: --None--	Title:	Department:	Operations <input type="checkbox"/>
Territory: Default	Account Manager: System Administrator		Sales <input type="checkbox"/>
			Support <input type="checkbox"/>

Required Modifications

Field	Modification
Last Name	
First	
Salutation	
Middle	
Suffix	
Gender	
Title Code	
Title	
Department	
Territory	
Account Manager	

Please refer to the *System Administrator Guide* for details on the Person Entry screen Type checkboxes.

New Fields to be added to this screen

Field	Position on Screen

### Person Summary Screen

Note that the Person Summary Screen is the Person panel on the Company Summary page. This is the only place it is displayed in CRM (not to be confused with the Person Summary page).

Contact ▾		
Last Name: <a href="#">Suzuki</a>	First: <a href="#">Chris</a>	Salutation:
Title: Bus Development Director	Department:	
Business E-mail: <a href="mailto:Chris.Suzuki@WilsonResources.co.uk">Chris.Suzuki@WilsonResources.co.uk</a>	Area Code: 1212	Number: 938 20

### Required Modifications

Field	Modification
Last Name	
First	
Salutation	
Title	
Department	
Business E-mail	
Area Code	
Number	

### New Fields to be added to this screen

Field	Position on Screen

**Person Marketing Box**

**Marketing Information**

CRM Solution Implemented:

IT Budget:

Current Supplier:

Preferred Database:

Current Supplier Description:


**Required Modifications**

Field	Modification
CRM Solution Implemented	
IT Budget	
Preferred Database	
Current Supplier	
Current Supplier Description	

**New Fields to be added to this screen**

Field	Position on Screen

### Person Dedupe Search Screen



The image shows a UI mockup for a 'Person' search screen. It features a light green header with the word 'Person' in a dark blue font. Below the header, there are two input fields. The first is labeled 'Last Name:' in blue text, followed by a white text box with a small blue asterisk to its right. The second is labeled 'First:' in blue text, followed by another white text box with a small blue asterisk to its right. The entire form area is enclosed in a thin grey border.

### Required Modifications

Field	Modification
Last Name	
First	

### New Fields to be added to this screen

Field	Position on Screen

### Person Top Content



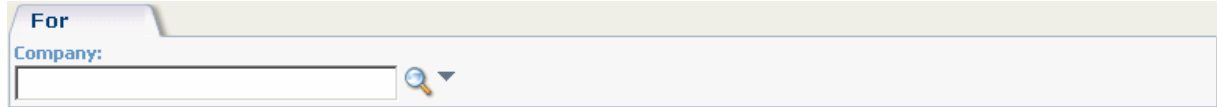
Person: William Agnew  
Company: Wilson Resources Ltd.

Phone: 44 161 132 567  
E-mail: [William.Agnew@WilsonResources.co.uk](mailto:William.Agnew@WilsonResources.co.uk)

### New Fields to be added to this screen

Field	Position on Screen

### Person Web Picker



The image shows a web interface element titled "Person Web Picker". It features a light green header with the word "For" in blue. Below the header is a search bar with the label "Company:" in blue. The search bar contains a text input field and a magnifying glass icon with a small downward arrow to its right.

### Required Modifications

---

Field	Modification
Company	

---

### New Fields to be added to this screen

---

Field	Position on Screen

---

## Person List Layout

### Person Grid

Last Name ▲	First	Company Name	Phone	Business E-mail	Territory
<a href="#">Aqnew</a>	William	<a href="#">Wilson Resources Ltd.</a>	44 161 132 567	<a href="mailto:William.Aqnew@WilsonResources.co.uk">William.Aqnew@WilsonResources.co.uk</a>	U.K.
<a href="#">Akester</a>	William	<a href="#">Readers Plc</a>	44 845 136 7710	<a href="mailto:William.Akester@ReadersPlc.co.uk">William.Akester@ReadersPlc.co.uk</a>	U.K.
<a href="#">Aldrich</a>	William	<a href="#">BMG Oil</a>	44 1689 143 5768	<a href="mailto:William.Aldrich@BMGOil.co.uk">William.Aldrich@BMGOil.co.uk</a>	U.K.
<a href="#">Allen</a>	Zack	<a href="#">California Telesensory</a>	1 818 546 4840	<a href="mailto:Zack.Allen@CaliforniaTelesensory.com">Zack.Allen@CaliforniaTelesensory.com</a>	US West
<a href="#">Anderson</a>	Yaukena	<a href="#">Circus Beverage Company</a>	1 216 901 1035	<a href="mailto:Yaukena.Anderson@CircusBeverageCompany.com">Yaukena.Anderson@CircusBeverageCompany.com</a>	US Central
<a href="#">Andrews</a>	Janet	<a href="#">Magnetic Software Ltd.</a>	1 617 720-1530		US East
<a href="#">Annala</a>	Wilmer	<a href="#">City Qualified Supplies</a>	1 605 232 5409	<a href="mailto:Wilmer.Annala@CityQualifiedSupplies.com">Wilmer.Annala@CityQualifiedSupplies.com</a>	US West
<a href="#">Antjes</a>	William	<a href="#">Cross Medical Berkshire</a>	1 410 558 6460	<a href="mailto:William.Antjes@CrossMedicalBerkshire.com">William.Antjes@CrossMedicalBerkshire.com</a>	US East
<a href="#">Arnold</a>	Uve	<a href="#">Axias International</a>	44 1793 145 6767	<a href="mailto:Uve.Arnold@AxiasInternational.co.uk">Uve.Arnold@AxiasInternational.co.uk</a>	U.K.
<a href="#">Aspen</a>	Ulf	<a href="#">Oracle Pursuit</a>	44 1993 145 7823	<a href="mailto:Ulf.Aspen@OraclePursuit.co.uk">Ulf.Aspen@OraclePursuit.co.uk</a>	U.K.

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Last Name		Y/N		Y/N	C/L/R	Y/N	Y/N
First		Y/N		Y/N	C/L/R	Y/N	Y/N
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Phone		Y/N		Y/N	C/L/R	Y/N	Y/N
Business E-mail		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N

Person List

Person	Title	Phone	Business E-mail	Territory	Type
<a href="#">Chris Suzuki</a>	Bus Development Director	44 1212 938 20	<a href="mailto:Chris.Suzuki@WilsonResources.co.uk">Chris.Suzuki@WilsonResources.co.uk</a>	U.K.	
<a href="#">William Agnew</a>	UK & International Distributio	44 161 132 567	<a href="mailto:William.Agnew@WilsonResources.co.uk">William.Agnew@WilsonResources.co.uk</a>	U.K.	

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Last Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Title		Y/N		Y/N	C/L/R	Y/N	Y/N
Phone		Y/N		Y/N	C/L/R	Y/N	Y/N
Business E-mail		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N
Type		Y/N		Y/N	C/L/R	Y/N	Y/N

Person Dedupe List

Person	Title	Phone	Business E-mail
<a href="#">Chris Suzuki</a>	Bus Development Director	44 1212 938 20	<a href="mailto:Chris.Suzuki@WilsonResources.co.uk">Chris.Suzuki@WilsonResources.co.uk</a>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Person		Y/N		Y/N	C/L/R	Y/N	Y/N
Title		Y/N		Y/N	C/L/R	Y/N	Y/N
Phone		Y/N		Y/N	C/L/R	Y/N	Y/N
Business E-mail		Y/N		Y/N	C/L/R	Y/N	Y/N

My Dashboard Person List

Person	Company Name
<a href="#">Kieran O'Toole</a>	<a href="#">Eurolandia</a>
<a href="#">Nikolai Holliday</a>	<a href="#">Warehouse Complete</a>

---

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Person		Y/N		Y/N	C/L/R	Y/N	Y/N
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N

---

## Person Summary Report

You can customize the header area of the Person Summary Report output, and also the layout of the Cases, Communications, and Opportunities list.

Person Summary - Arthur Browne						
Person	Arthur Browne	Title	Sales Manager			
Phone	1 212 736-4440	Company Name	Design Right Inc.			
Country	United States	Account Manager	Susan Maye			
<b>Cases</b>						
Status	RefId	Opened	Priority	Description	Assigned To	Stage
In Progress	0-20	12/03/2004 13:53	Normal	Setup not working	Graham Rogers	Logged
<b>Communications</b>						
Action	Date / Time	Details	User	Status		
Letter Out	21/10/2004 14:25	Sent proposal	Susan Maye	Complete		
Phone Out	21/10/2004 14:50	initial contact attempt with Arthur Browne of DRI. Spoke to his team leader and they do have a project and would be interested in discussing it	Susan Maye	Complete		
Meeting	24/10/2004 10:25	Call to introduce myself	Tim McGraw	Pending		
Phone Out	05/11/2004 13:25	Follow Up with Arthur when he returns from vacation to see what he thought of the proposal	Susan Maye	Pending		
<b>Opportunities</b>						
Status	Description	Opened	Stage	Priority	Assigned To	
In Progress	50 Users plus consulting	09/09/2004 13:24	Negotiating	Normal	Susan Maye	
Person Summary - Arthur Browne						
1						

### Person Report Summary Screen

To customize the header information of the Person Summary Report, select Administration | Customization | Person | Screens and select the Person Report Summary screen.

Person	Arthur Browne	Title	Sales Manager
Phone	1 212 736-4440	Company Name	Design Right Inc.
Country	United States	Account Manager	Susan Maye

### Required Modifications

Field	Modification
Person	
Title	
Phone	
Company Name	
Country	
Account Manager	

### New Fields to be added to this screen

Field	Position on Screen

### Person Summary Report Cases

To customize the layout of the Cases list on the Person Summary Report, select Administration | Customization | Person | Summary Report and select the Cases hyperlink.

#### Cases

Status	RefId	Opened	Priority	Product	Description	Assigned To	Stage
In Progress	1-20	2015/2103 1845	Normal		Situpal working	Israhm Haters	Logged

### Required Modifications

Column	Modification
Status	
RefId	
Opened	
Priority	
Product	
Description	
Assigned To	
Stage	

### Person Summary Report Communications

To customize the layout of the Communications list on the Person Summary Report, select Administration | Customization | Person | Summary Report and select the Communications hyperlink.

#### Communications

Action	Date / Time	Details	User	Status
Letter Out	21/10/2009 14:25	Sent proposal	Susan Mayo	Complete
Phone Out	21/10/2009 14:30	Initial contact attempt with Arthur Browne of DRL spoke to his team leader and they do have a project and would be interested in discussing it	Susan Mayo	Complete
Meeting	24/10/2009 10:25	Call to introduce myself	Tim Wescott	Pending
Phone Out	25/11/2009 13:25	Follow up with Arthur with the details from Wescott to see what he thought of the proposal	Susan Mayo	Pending

### Required Modifications

Column	Modification
Action	
Date / Time	
Details	
User	
Status	

### Person Summary Report Opportunities

To customize the layout of the Opportunities list on the Person Summary Report, select Administration | Customization | Person | Summary Report and select the Opportunities hyperlink.

#### Opportunities

Status	Description	Product	Opened	Stage	Priority	Assigned To
In Progress	50 Users plus consulting	Expense Check	01/09/2003 1:52:04	Modifying	Normal	Stacy Mays

### Required Modifications

Column	Modification
Status	
Description	
Product	
Opened	
Stage	
Priority	
Assigned To	

## Address Screen Layout

### Address Entry Screen

**Address** ▶

<b>Address 1:</b> <input style="width: 95%;" type="text"/> *	<b>Address 2:</b> <input style="width: 95%;" type="text"/>	<b>Type</b> Business <input type="checkbox"/>
<b>Address 3:</b> <input style="width: 95%;" type="text"/>	<b>Address 4:</b> <input style="width: 95%;" type="text"/>	Billing <input type="checkbox"/>
<b>City:</b> <input style="width: 95%;" type="text"/>	<b>State:</b> <input style="width: 95%;" type="text"/>	Shipping <input type="checkbox"/>
<b>Zip Code:</b> <input style="width: 95%;" type="text"/>	<b>Country:</b> <input style="width: 95%;" type="text" value="--None--"/>	
Set As Default <input type="checkbox"/>		

[Select an Address to Update or Copy](#)

New company address  
 Update selected company address

### Required Modifications

Field	Modification
Address 1	
Address 2	
Address 3	
Address 4	
City	
State	
Zip Code	
Country	

Please refer to the *System Administrator Guide* for details on the Address Entry screen Type checkboxes.

### New Fields to be added to this screen

Field	Position on Screen

### Address Summary Screen

The Address Summary Screen is the Address panel on the Company and Person Summary page.



### Required Modifications

Field	Modification
Street	
City	
State	
Zip Code	
Country	

### New Fields to be added to this screen

Field	Position on Screen

## Address List Layout

### Address List

Street	City	Zip Code	State	Country	Type
<a href="#">Anchorage Court</a> <a href="#">Caspian Road</a> <a href="#">Atlantic Office Park</a>	ALTRINCHAM	WA14 5HH	Cheshire	United Kingdom	
<a href="#">Cornwall Court</a> <a href="#">19 Cornwall St</a>	BIRMINGHAM	B3 2DT	West Midlands	United Kingdom	

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Street		Y/N		Y/N	C/L/R	Y/N	Y/N
City		Y/N		Y/N	C/L/R	Y/N	Y/N
Zip Code		Y/N		Y/N	C/L/R	Y/N	Y/N
State		Y/N		Y/N	C/L/R	Y/N	Y/N
Country		Y/N		Y/N	C/L/R	Y/N	Y/N

## Phone Number Configuration

Decide if the Country Code and Area Code fields are to be used. These are defined in Administration | System | System Behavior.

Phone			
	Country	Area	Number
Business:	<input type="text" value="1"/>	<input type="text" value="216"/>	<input type="text" value="901 1035"/>
Fax:	<input type="text" value="1"/>	<input type="text" value="216"/>	<input type="text" value="901 1129"/>
ISDN:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Modem:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Toll Free:	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Company Level Phone Fields

The Phone Number Types can be customized in Administration | Customization | Translations. For example, Toll Free can be changed to Help Line—refer to the screen shot above. For more information, please refer to the *System Administrator Guide*.

### Person Level Phone Fields

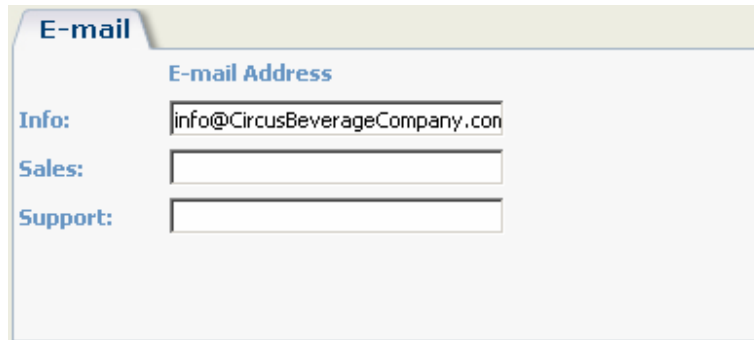
Likewise, the Phone Number Types for a Person can be customized.

Phone			
	Country	Area	Number
Business	<input type="text" value="1"/>	<input type="text" value="216"/>	<input type="text" value="901 1035"/>
Fax	<input type="text" value="1"/>	<input type="text" value="216"/>	<input type="text" value="901 1129"/>
Home	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mobile	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pager	<input type="text"/>	<input type="text"/>	<input type="text"/>

## E-mail

### Company Level E-mail Fields

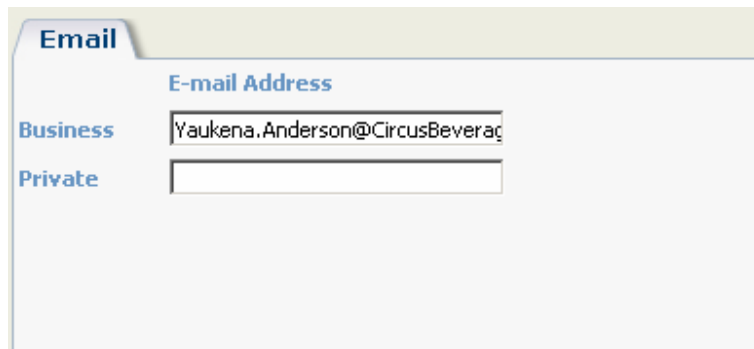
The E-mail Types can be customized in Administration | Customization | Translations. For example, Support to Tech Support.



The screenshot shows a form titled "E-mail" with a sub-header "E-mail Address". It contains three input fields: "Info:" with the value "info@CircusBeverageCompany.com", "Sales:" which is empty, and "Support:" which is empty.

### Person Level E-mail Fields

Likewise, the E-mail Types for a Person can be customized.

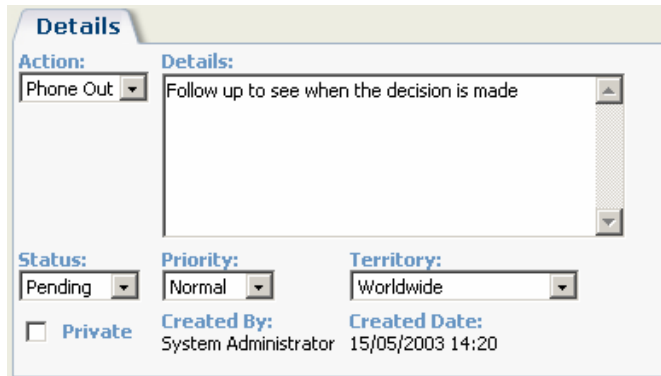


The screenshot shows a form titled "Email" with a sub-header "E-mail Address". It contains two input fields: "Business" with the value "Yaukena.Anderson@CircusBeverag" and "Private" which is empty.

# Communication Information Management

## Communication Screen Layout

### Custom Communication Detail Box



**Details**

**Action:** Phone Out

**Details:** Follow up to see when the decision is made

**Status:** Pending

**Priority:** Normal

**Territory:** Worldwide

Private

**Created By:** System Administrator

**Created Date:** 15/05/2003 14:20

### Required Modifications

Field	Modification
Action	
Details	
Status	
Priority	
Territory	
Private	
Created By	
Created Date	

### New Fields to be added to this screen

Field	Position on Screen

### Communication Scheduling Box

### Required Modifications

Field	Modification
Due Date / Time	
User	
Start Date / Time	
Onscreen Reminder	
Reminder	
Reminder Date / Time	
Send Reminder Message	
Team	

### New Fields to be added to this screen

Field	Position on Screen


**Communication Filter Box**

**Action:**

**Status:**

**Type:**

**Territory:**

 **Apply Filter**

**Required Modifications**

Field	Modification
Action	
Status	
Type	
Territory	


**New Fields to be added to this screen**

Field	Position on Screen

### Communication Task Filter Box

**Status:**  
Pending ▾

**Action:**  
--All-- ▾

 Apply Filter

### Required Modifications

---

Field	Modification
Status	
Action	

---

### New Fields to be added to this screen

---

Field	Position on Screen

---

**Communication Campaign Box**

**Campaigns**

**Wave Activity:**  
Ad in "Expenses Management Magazine"

**Response Type:**

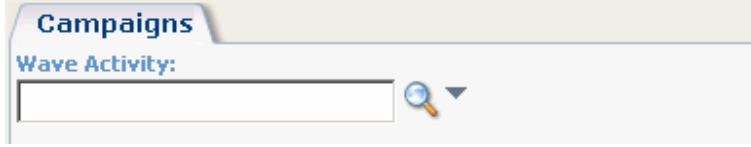
**Required Modifications**

Field	Modification
Wave Activity	
Response Type	

**New Fields to be added to this screen**

Field	Position on Screen

### Communication Wave Detail Box



### Required Modifications

---

Field	Modification
Wave Activity	

---

### New Fields to be added to this screen

---

Field	Position on Screen

---

### Communication Top Content



### New Fields to be added to this screen

Field	Position on Screen

### Communication Web Picker

The screenshot shows a web interface for selecting communication entities. It has a 'For' tab at the top left. Below the tab are three search fields: 'Company:', 'Person:', and 'Regarding:'. Each field has a magnifying glass icon and a dropdown arrow. To the right of these fields are two buttons: 'New Company' (with a document icon) and 'New Person' (with a person icon).

### Required Modifications

---

Field	Modification
Company	
Person	
Regarding	

---

### New Fields to be added to this screen

---

Field	Position on Screen

---

## Communication List Layout

### Communication List

	Date / Time	Action	Person	Details	User	Territory	Attachment	Regarding	Status
	24/11/2004 21:00	Meeting	<a href="#">Reg Barrow</a>	Meeting with Reg - possible next steps discussion	John Finch	US & Canada			<input type="checkbox"/>
	06/11/2004 13:30	Meeting	<a href="#">Reg Barrow</a>	call re outstanding bill	Susan Maye	US East			<input type="checkbox"/>
	05/11/2004 13:25	Phone Out	<a href="#">Arthur Browne</a>	Follow Up with Arthur when he returns from vacation to see what he thought of the proposal	Susan Maye	US East			<input type="checkbox"/>
	24/10/2004 10:25	Meeting	<a href="#">Arthur Browne</a>	Call to introduce myself	Tim McGraw	US East			<input type="checkbox"/>
	21/10/2004 14:50	Phone Out	<a href="#">Arthur Browne</a>	Initial contact attempt with Arthur Browne of DRI. Spoke to his team leader and they do have a project and would be interested in discussing it	Susan Maye	US East			<input checked="" type="checkbox"/>
	21/10/2004 14:25	Letter Out	<a href="#">Arthur Browne</a>	Sent proposal	Susan Maye	US East			<input checked="" type="checkbox"/>
	30/09/2004 21:00	Meeting	<a href="#">Reg Barrow</a>	Meeting with Reg - possible next steps discussion	John Finch	US & Canada			<input type="checkbox"/>



Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Action		Y/N		Y/N	C/L/R	Y/N	Y/N
Date / Time		Y/N		Y/N	C/L/R	Y/N	Y/N
Action		Y/N		Y/N	C/L/R	Y/N	Y/N
Person		Y/N		Y/N	C/L/R	Y/N	Y/N
Details		Y/N		Y/N	C/L/R	Y/N	Y/N
User		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N
Attachment		Y/N		Y/N	C/L/R	Y/N	Y/N
Regarding		Y/N		Y/N	C/L/R	Y/N	Y/N
Status		Y/N		Y/N	C/L/R	Y/N	Y/N

Communication To Do List

	Date / Time	Person	Company Name	Action ^	Details	Territory	Attachment	Regarding	Status
	05/05/2002 11:32	<a href="#">Janet Andrews</a>	<a href="#">Magnetic Software Ltd.</a>	Phone Out	Followup call from Finance mailer	<a href="#">Worldwide</a>			<input checked="" type="checkbox"/>



Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Action		Y/N		Y/N	C/L/R	Y/N	Y/N
Date / Time		Y/N		Y/N	C/L/R	Y/N	Y/N
Person		Y/N		Y/N	C/L/R	Y/N	Y/N
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Action		Y/N		Y/N	C/L/R	Y/N	Y/N
Details		Y/N		Y/N	C/L/R	Y/N	Y/N
Attachment		Y/N		Y/N	C/L/R	Y/N	Y/N
Regarding		Y/N		Y/N	C/L/R	Y/N	Y/N
Status		Y/N		Y/N	C/L/R	Y/N	Y/N

Communications Lead List

	Date / Time ^	Details	Territory	Action	Regarding	Status
	Today 11:35		Worldwide	Letter Out		<input type="checkbox"/>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Action		Y/N		Y/N	C/L/R	Y/N	Y/N
Date / Time		Y/N		Y/N	C/L/R	Y/N	Y/N
Details		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N
Action		Y/N		Y/N	C/L/R	Y/N	Y/N
Regarding		Y/N		Y/N	C/L/R	Y/N	Y/N
Status		Y/N		Y/N	C/L/R	Y/N	Y/N

**Communications Solution List**

Date / Time	Action	Details	User	Regarding	Status
 Today 11:40	E-mail Out		System Administrator		<input type="checkbox"/>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Action		Y/N		Y/N	C/L/R	Y/N	Y/N
Date / Time		Y/N		Y/N	C/L/R	Y/N	Y/N
Action		Y/N		Y/N	C/L/R	Y/N	Y/N
Details		Y/N		Y/N	C/L/R	Y/N	Y/N
User		Y/N		Y/N	C/L/R	Y/N	Y/N
Regarding		Y/N		Y/N	C/L/R	Y/N	Y/N
Status		Y/N		Y/N	C/L/R	Y/N	Y/N

Communications Task List

!	Due Date		Details	
	05/05/2002		<a href="#">Janet Andrews</a> <a href="#">Magnetic Software Ltd.</a> 1 617 720-1530 Followup call from Finance mailer	<input checked="" type="checkbox"/>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Priority		Y/N		Y/N	C/L/R	Y/N	Y/N
Due Date		Y/N		Y/N	C/L/R	Y/N	Y/N
Action		Y/N		Y/N	C/L/R	Y/N	Y/N
Details		Y/N		Y/N	C/L/R	Y/N	Y/N
Status		Y/N		Y/N	C/L/R	Y/N	Y/N

## E-mail Communication Screens

### E-mail Filing Box

**Communication Options**

Status:  Team:  Territory:  Action:

Wave Activity:  

### Required Modifications

Field	Modification
Status	
Team	
Territory	
Action	
Wave Activity	

### New Fields to be added to this screen

Field	Position on Screen

# Lead Information Management

## Lead Screen Layout

### Lead Address Screen

Lead Address Details	
<b>Address 1:</b> Bakker Holland	<b>Address 2:</b> PO Box 105
<b>Address 3:</b>	<b>Address 4:</b>
<b>City:</b> SPALDING	<b>Zip Code:</b> PE11 3WD
<b>State:</b> Lincolnshire	<b>Country:</b> United Kingdom

### Required Modifications

Field	Modification
Address 1	
Address 2	
Address 3	
Address 4	
City	
Zip Code	
State	
Country	

### New Fields to be added to this screen

Field	Position on Screen

### Lead Company Screen

**Lead Company Details**  
This Lead is matched to Company: [Computer Insurance](#)  
Company Name: Computer Insurance      Web Site: <http://www.ComputerInsurance.ie>      Industry:      Annual Revenues:      No. of Employees:  
 [Add or Find this Company](#)

### Required Modifications

Field	Modification
Company Name	
Web Site	
Industry	
Annual Revenues	
No. of Employees	

### New Fields to be added to this screen

Field	Position on Screen

Lead Details Screen

Lead Detail			
<b>Description:</b> TimEx5Lead - Phone	<b>Source:</b> Phone	<b>Opened:</b> 08/12/2002 15:50	<b>Main Product Interest:</b> TimEx 5 Enterprise
<b>Details:</b>	<b>Wave Activity:</b>		<b>Decision Timeframe:</b> 1 - 3 months

Required Modifications

Field	Modification
Description	
Source	
Opened	
Main Product Interest	
Details	
Wave Activity	
Decision Timeframe	

New Fields to be added to this screen

Field	Position on Screen

### Lead Person Screen

**Lead Contact Details**

This Contact is matched to: [James Kerry Keane](#)

<b>Last name:</b> Kerry Keane	<b>First name:</b> James	
<b>Salutation:</b>	<b>Title:</b> Marketing Director	<b>E-mail:</b> James.Kerry Keane@ComputerInsurance.ie
<b>Country Code:</b> 353	<b>Area Code:</b> 91	<b>Phone Number:</b> 772663
<b>Country Code:</b> 353	<b>Area Code:</b> 91	<b>Fax Number:</b> 766721

 [Add or Find this Person](#)

### Required Modifications

Field	Modification
Last Name	
First Name	
Salutation	
Title	
E-mail	
Country Code	
Area Code	
Phone Number	
Country Code	
Area Code	
Fax Number	

### New Fields to be added to this screen

Field	Position on Screen

Lead Search Box

The screenshot shows a 'Find' search box with a title bar containing a search icon and a dropdown menu set to '--No Search--'. The search box is organized into three columns. The left column contains 'Company Name' (text input), 'Description' (text input), 'Opened' (text input with a calendar icon), and 'Assigned to' (text input with a search icon and a dropdown menu set to '--All--'). The middle column contains 'Last name' (text input), 'Status' (dropdown menu set to '--All--'), and 'Rating' (dropdown menu set to '--All--'). The right column contains 'First name' (text input), 'Stage' (dropdown menu set to '--All--'), and 'Territory' (dropdown menu set to '--All--').

Required Modifications

Field	Modification
Company Name	
Last Name	
First Name	
Description	
Status	
Stage	
Opened	
Rating	
Territory	
Assigned to	

New Fields to be added to this screen

Field	Position on Screen

### Lead Top Content

A blue banner with a white starburst icon on the left containing lead information. The text is white and includes the lead name, company, phone number, and email address.

Lead: TimeMgrLead - Phone  
Lead Company: Alba International  
Phone: 44 1895 148 967  
E-mail: [Tom.Barnett@AlbaInternational.co.uk](mailto:Tom.Barnett@AlbaInternational.co.uk)

### New Fields to be added to this screen

---

Field	Position on Screen

---

**Lead Filter Box**

Status: In Progress  
Stage: --All--  
Company Name:  
First name:  
Last name:  
Territory: --All--  
Apply Filter

**Required Modifications**






Field	Modification
Status	
Stage	
Company Name	
First Name	
Last Name	
Territory	

**New Fields to be added to this screen**

Field	Position on Screen




## Lead List Layout

### Lead Grid

Status	Company Name	First name	Last name	Description	Stage	Assigned to	Territory
	Global Incorporated GPS	Wayne	Bhusri	<a href="#">TimeNExpense Email Lead</a>	Converted	Fred Jones	Marketing - US
	Bank Of Colliers	Jacklyn	Downes	<a href="#">TimEx5Lead - Phone</a>	Converted	Fred Jones	Marketing - US
	Union Computer	David	Partridge	<a href="#">ExpenseCheckLead - Phone</a>	Converted	Fred Jones	Marketing - US
	Healthcare Interactive	Vu	Bhusri	<a href="#">Website Offer #6 - Lead</a>	Converted	Fred Jones	Marketing - US
	Mardon Communications Lakeshore	Carol	Leeder	<a href="#">Website Offer #8 - Lead</a>	Converted	Fred Jones	Marketing - US

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
First Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Last Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Stage		Y/N		Y/N	C/L/R	Y/N	Y/N
Assigned To		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N

## Lead List

Status	Description ^	Company Name	Last name	First name	Stage	Opened	Territory
	<a href="#">ExpenseCheckLead - Fax</a>	Storage & National	Goodwin	Jim	New Lead	05/20/2003 9:49 AM	<a href="#">Marketing - US</a>
	<a href="#">ExpenseCheckLead - Fax</a>	Michigan Manufacturing	Bracho	Dave	New Lead	09/04/2003 11:32 AM	<a href="#">Marketing - US</a>
	<a href="#">ExpenseCheckLead - Fax</a>	Vacumm Ascent	Nicholson	Cassandra	Assigned	04/09/2003 2:27 PM	<a href="#">Marketing - US</a>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Last Name		Y/N		Y/N	C/L/R	Y/N	Y/N
First Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Stage		Y/N		Y/N	C/L/R	Y/N	Y/N
Opened		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N

**My Dashboard Lead List**

Description	Company Name	Priority
<a href="#">ExpenseCheckLead - Fax</a>	Blue Textiles	Normal
<a href="#">ExpenseCheckLead - Fax</a>	MeesPierson Microelectronics Ltd	Normal
<a href="#">ExpenseCheckLead - Fax</a>	Hirschmann (GB)	Normal
<a href="#">ExpenseCheckLead - Fax</a>	Water Planning	Normal
<a href="#">ExpenseCheckLead - Phone</a>	Panpak Ireland Ltd	Normal

---

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Priority		Y/N		Y/N	C/L/R	Y/N	Y/N

# Marketing Campaign Information Management

This includes reviewing and defining information within Campaigns, Waves, Wave Items.

## Campaign Screen Layout

### Campaign Detail Box

Campaign		
Campaign Name: <input type="text"/>	Start: <input type="text" value="16/05/2003"/>	End: <input type="text"/>
Status: <input type="text" value="Pending"/>	Campaign Budget: <input type="text"/>	Actual Cost: <input type="text"/>

### Required Modifications

Field	Modification
Campaign Name	
Start	
End	
Status	
Campaign Budget	
Actual Cost	

### New Fields to be added to this screen

Field	Position on Screen

### Campaign Filter Box

**Status:**  
--All--

**Created By:**  
[Search Icon] [Text Field] --All--

**Start:**  
[Search Icon] [Text Field] [Calendar Icon]

[Search Icon] Apply Filter

### Required Modifications

---

Field	Modification
Status	
Created By	
Start	

---

### New Fields to be added to this screen

---

Field	Position on Screen

---

## Campaign List Layout

### Campaign List

3 Campaigns Found, Page 1 of 1

Campaign Name	Start ^	End	Actual Cost (\$)
<a href="#">TimeNExpense Marketing Campaign</a>	01/01/2003	31/12/2003	10,600.00
<a href="#">Panoply Website Marketing</a>	01/01/2003	31/12/2003	3,010.00
<a href="#">Cold Calling Campaign</a>	28/02/2003	29/04/2003	4,000.00

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Campaign Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Start		Y/N		Y/N	C/L/R	Y/N	Y/N
End		Y/N		Y/N	C/L/R	Y/N	Y/N
Actual Cost		Y/N		Y/N	C/L/R	Y/N	Y/N

### Campaign Grid

This grid is available on the OutBound Calls tab in the My CRM work area, for example.

Wave Activity Name	Campaign Name ^	Wave Name
<a href="#">Followup Call - Finance</a>	Cold Calling Campaign	Follow Up Calls

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Wave Activity Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Campaign Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Wave Name		Y/N		Y/N	C/L/R	Y/N	Y/N

## Wave Screen Layout

### Wave Detail Box

Wave		
Wave Name:	Start:	End:
<input type="text"/> *	16/05/2003	<input type="text"/>
Status:	Wave Budget:	Actual Cost:
Pending	\$ <input type="text"/>	\$ <input type="text"/>

### Required Modifications

Field	Modification
Wave Name	
Start	
End	
Status	
Wave Budget	
Actual Costs	

### New Fields to be added to this screen

Field	Position on Screen

## Wave List Layout

### Wave List

This list is displayed from within the Campaign context, when the Hide Wave Activities button is selected.

Wave Name	Start ^	End	Actual Cost (\$)
<a href="#">Initial Contact Verification</a>	01/11/2003	15/11/2003	0.00
<a href="#">Mailers to verified contacts</a>	16/11/2003	16/11/2003	1,000.00
<a href="#">Follow Up Calls</a>	22/11/2003	28/11/2003	3,000.00

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Wave Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Start		Y/N		Y/N	C/L/R	Y/N	Y/N
End		Y/N		Y/N	C/L/R	Y/N	Y/N
Actual Cost		Y/N		Y/N	C/L/R	Y/N	Y/N

## Wave Item Screen Layout

### Wave Item Detail Box

The screenshot shows a 'Wave Activity' detail box with the following fields and values:

- Wave Activity Name:** [Text input field with an asterisk]
- Status:** No Actions Yet
- Type:** --None-- (dropdown menu)
- Details:** [Text area with scrollbars]
- Start:** 16/05/2003 (calendar icon)
- End:** [Text input field with calendar icon]
- Target List:** --None-- (dropdown menu)
- Activity Budget:** \$ [Text input field]
- Actual Cost:** \$ [Text input field]

### Required Modifications

Field	Modification
Wave Activity Name	
Status	
Type	
Details	
Start	
End	
Target List	
Activity Budget	
Actual Cost	

### New Fields to be added to this screen

Field	Position on Screen

### Wave Item Search Box

This screen is displayed when performing a standard search from a Wave Activity Advanced Search Select field – for example, from the Communication screen.

The screenshot shows a search interface with a light green header containing the word "Find". Below the header are three input fields, each with a label to its left: "Campaign Name:", "Wave Name:", and "Wave Activity Name:". The input fields are empty and have a light gray border.

### Required Modifications

Field	Modification
Campaign Name	
Wave Name	
Wave Activity Name	

### New Fields to be added to this screen

Field	Position on Screen

## Wave Item List Layout

### Wave Item Grid






This grid is displayed as a result of a standard search from a Wave Activity Advanced Search Select field – for example, from the Communication screen.

Wave Activity Name	Campaign Name ^	Wave Name
<a href="#">Cold Calling - ProfServ Segment</a>	Cold Calling Campaign	Initial Contact Verification
<a href="#">Followup Call - Finance</a>	Cold Calling Campaign	Follow Up Calls
<a href="#">Website Monthly Offers #1</a>	Panoply Website Marketing	Monthly Website Offers
<a href="#">Website Monthly Offers #2</a>	Panoply Website Marketing	Monthly Website Offers
<a href="#">Website Monthly Offers #3</a>	Panoply Website Marketing	Monthly Website Offers
<a href="#">Website Monthly Offers #4</a>	Panoply Website Marketing	Monthly Website Offers

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Wave Activity Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Campaign Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Wave Name		Y/N		Y/N	C/L/R	Y/N	Y/N

### Wave Item List

This list is displayed in the context of a Wave.

Status	Wave Activity Name	Type	Start ^	End	Actual Cost (\$)
<input type="checkbox"/>	<a href="#">Mailer to target companies</a>		13/10/2003	28/12/2003	800.00
<input type="checkbox"/>	<a href="#">Follow up Mailer</a>		13/10/2003	28/12/2003	800.00
<input type="checkbox"/>	<a href="#">PR - Initial Press Release</a>		13/10/2003	28/12/2003	0.00
<input type="checkbox"/>	<a href="#">Internal Telemarketing Follow Up</a>		13/10/2003	28/12/2003	0.00
<input type="checkbox"/>	<a href="#">Outsourced Telemarketing Follow Up</a>		13/10/2003	28/12/2003	1,000.00

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Wave Activity Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Type		Y/N		Y/N	C/L/R	Y/N	Y/N
Start		Y/N		Y/N	C/L/R	Y/N	Y/N
End		Y/N		Y/N	C/L/R	Y/N	Y/N
Actual Cost		Y/N		Y/N	C/L/R	Y/N	Y/N

# Opportunity Information Management

## Opportunity Screen Layout

### Opportunity Search Screen

The screenshot shows a search interface with the following fields and controls:

- Find** (tab)
- Description:** Text input field
- Customer Ref:** Text input field
- Stage:** Dropdown menu (value: --All--)
- Status:** Dropdown menu (value: --All--)
- Company Name:** Text input field
- Last Name:** Text input field
- First:** Text input field
- Territory:** Dropdown menu (value: --All--)
- Assigned To:** Text input field with a magnifying glass icon and a dropdown menu (value: --All--)
- Search button: --No Search-- (dropdown menu)
- Help icon: + (button)

### Required Modifications

Field	Modification
Description	
Customer Ref	
Stage	
Status	
Company Name	
Last Name	
First	
Territory	
Assigned To	

### New Fields to be added to this screen

Field	Position on Screen

### Opportunity Detail Screen

**Details**

**Description:**  
 \*

**Details:**  
 \*

**Wave Activity:**

**Source:**

**Opened:**

**Territory:**

**Type:**

**Closed:**

**Customer Ref:**

### Required Modifications

Field	Modification
Description	
Source	
Type	
Customer Ref	
Details	
Opened	
Closed	
Territory	
Wave Activity	

### New Fields to be added to this screen

Field	Position on Screen

### Opportunity Filter Box

The screenshot shows a filter box with three dropdown menus and an 'Apply Filter' button. The 'Status' dropdown is set to 'In Progress', 'Stage' is set to '--All--', and 'Territory' is set to '--All--'. The 'Apply Filter' button is located at the bottom left of the filter box.





### Required Modifications

Field	Modification
Status	
Stage	
Territory	

### New Fields to be added to this screen

Field	Position on Screen

### Opportunity Web Picker

**For**  
**Company:**   **Person:**    **New Company**  **New Person**

### Required Modifications

---

Field	Modification
Company	
Person	

---

### New Fields to be added to this screen

---

Field	Position on Screen

---

### Opportunity Totals

Opportunity Total		
<b>Opportunity Currency:</b> £	<b>Total Quote Value:</b> £ 11,430.00 \$ 17,871.94 @ 1 : 1.563599	<b>Total Order Value:</b> £ 0.00 \$ 0.00 @ 1 : 1.563599

### Required Modifications

Field	Modification
Opportunity Currency	
Total Quote Value	
Total Order Value	

### New Fields to be added to this screen

Field	Position on Screen

### Opportunity Top Content






	Opportunity: June Website Offer Lead Company: Accantia Ltd. Person: Thomas Beesley	Phone: 44 1628 149 4727 E-mail: <a href="mailto:Thomas.Beesley@Accantia.co.uk">Thomas.Beesley@Accantia.co.uk</a>
---	--	---

### New Fields to be added to this screen

Field	Position on Screen


## Opportunity List Layout

### Opportunity Grid

Status	Company Name	Person	Description	Type ^	Stage	Territory	Assigned To
	<a href="#">Gatecom Inc.</a>	<a href="#">Simon Yaltoy</a>	Training solution for 40 users		Proposal Submitted	US West	Brian Little
	<a href="#">Gatecom Inc.</a>	<a href="#">Simon Yaltoy</a>	Training course		Proposal Submitted	US West	Susan Maye
	<a href="#">Accantia Ltd.</a>	<a href="#">Thomas Beesley</a>	June Website Offer Lead		Lead	U.K.	System Administrator
	<a href="#">Veritas Sales Management</a>	<a href="#">Brian Tuban</a>	TimeNExpense Conference Visitor		Lead	U.K.	Matthew Ebden
	<a href="#">Voice Rohm UK</a>	<a href="#">Bruce Torby</a>	TimeNExpense Conference Visitor		Qualified	U.K.	Matthew Ebden
	<a href="#">Teleqlobe Lease</a>	<a href="#">Charles Taylor</a>	TimeNExpense Conference Visitor		Proposal Submitted	U.K.	Peter Johnson

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Person		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Type		Y/N		Y/N	C/L/R	Y/N	Y/N
Stage		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N
Assigned To		Y/N		Y/N	C/L/R	Y/N	Y/N

### Opportunity List

Status	Description	Company Name ▲	Person	Opened	Stage	Priority	Territory
	<a href="#">June Website Offer Lead</a>	<a href="#">Accantia Ltd.</a>	<a href="#">Thomas Beesley</a>	28/09/2004 15:55	Lead	Normal	<a href="#">U.K.</a>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Person		Y/N		Y/N	C/L/R	Y/N	Y/N
Opened		Y/N		Y/N	C/L/R	Y/N	Y/N
Stage		Y/N		Y/N	C/L/R	Y/N	Y/N
Priority		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N

My Dashboard Opportunity List

Description	Company Name	Forecast (\$)
<a href="#">June Website Offer Lead</a>	<a href="#">Accantia Ltd.</a>	10,000.00

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Forecast		Y/N		Y/N	C/L/R	Y/N	Y/N

## Opportunity Summary Report

You can customize the header area of the Opportunity Summary Report output, and also the layout of the Communications and Opportunity Tracking list.

**Opportunity Summary - June Website Offer Lead**

---

Priority	Normal	Source	Web
Team	Direct Sales	Person	Thomas Beesley
Company Name	Accantia Ltd.	Forecast	10,000.00
Assigned To	System Administrator	Stage	Lead
Status	In Progress		

**Communications**

Date / Time	Action	Person	Details	User	Territory	Status
01/12/2004 12:35	Letter Out	Thomas Beesley		System Administrator	J.K.	Pending

**Opportunity Tracking**

Status	Created Date	Created By	Stage	Tracking Note	Duration
In Progress	18/11/2004 16:25	System Administrator	Lead		23 Day(s)
In Progress	18/11/2004 16:25	System Administrator	Lead		21 Day(s) 1 Hour 34 Minute(s)
In Progress	18/11/2004 16:25	System Administrator	Lead		7 Day(s) 4 Hour(s) 25 Minute(s)
In Progress	01/12/2004 12:35	System Administrator	Lead		8 Minute(s)

Opportunity Summary - June Website Offer Lead 1

### Opportunity Report Summary Screen

To customize the header information of the Opportunity Summary Report, select Administration | Customization | Opportunity | Screens and select the Opportunity Report Summary screen.

Priority	Normal	Source	Web
Team	Direct Sales	Person	Thomas Beesley
Company Name	Accantia Ltd.	Forecast	10,000.00
Assigned To	System Administrator	Stage	Lead
Status	In Progress		

### Required Modifications

Field	Modification
Priority	
Source	
Team	
Person	
Company Name	
Forecast	
Assigned To	
Stage	
Status	

### New Fields to be added to this screen

Field	Position on Screen

### Opportunity Summary Report Communications

To customize the layout of the Communications list on the Opportunity Summary Report, select Administration | Customization | Opportunity | Summary Report and select the Communications hyperlink.

#### Communications

Date / Time	Action	Person	Details	User	Territory	Status
	E-mail CC	Thomas Bessley		System Administrator	U.S.	Pending

### Required Modifications

Column	Modification
Date / Time	
Action	
Person	
Details	
User	
Territory	
Status	

### Opportunity Summary Report Opportunity Tracking

To customize the layout of the Opportunity Tracking list on the Opportunity Summary Report, select Administration | Customization | Opportunity | Summary Report and select the Opportunity Tracking hyperlink.

#### Opportunity Tracking

Status	Created Date	Created By	Stage	Tracking Note	Duration
In Progress	20/12/2003 15:56	System Administrator	Lead		53 Days
In Progress	21/02/2004 15:56	System Administrator	Lead		51 Days (1 Hour 34 Minutes)
In Progress	22/02/2004 15:56	System Administrator	Lead		0 Minutes

### Required Modifications

Column	Modification
Date / Time	
Action	
Person	
Details	
User	
Territory	
Status	

## Quote and Order Screen Layout

### Quote Summary Screen

**NewQuote**

<b>Currency:</b> \$ *	<b>Pricing List:</b> Default *	<b>Status:</b> Active *	<input checked="" type="checkbox"/> <b>Include In Quotes Total</b>
<b>Reference:</b> Created On Save	<b>Opened:</b> 01/12/2004 12:45	<b>Expiration Date:</b> 08/12/2004 12:45	
<b>Description:</b> <input style="width: 100%;" type="text"/>			

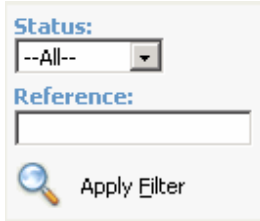
### Required Modifications

Field	Modification
Currency	
Pricing List	
Status	
Include In Quotes Total	
Reference	
Opened	
Expiration Date	
Description	

### New Fields to be added to this screen

Field	Position on Screen

### Quote Filter Box



The image shows a 'Quote Filter Box' with a light gray background. It contains a 'Status:' label above a dropdown menu with '--All--' selected. Below that is a 'Reference:' label above a text input field. At the bottom left is a magnifying glass icon, and at the bottom right is the text 'Apply Filter'.

### Required Modifications

---

Field	Modification
Status	
Reference	

---

### New Fields to be added to this screen

---

Field	Position on Screen

---

### Order Summary Screen

**New Order**

<b>Currency:</b> \$ *	<b>Pricing List:</b> Default *	<b>Delivery Date:</b> <input type="text"/>	<b>Status:</b> Active *
<b>Reference:</b> Created On Save	<b>Opened:</b> 01/12/2004 12:45	<b>PO Reference:</b> <input type="text"/>	
<b>Description:</b> <input type="text"/>	<b>Contact:</b> <input type="text"/>	<b>Billing Address:</b> Geoffrey House Vanwall Business Park Vanwall Road MAIDENHEAD Berkshire SL6 4UB United Kingdom Geoffrey House, Vanw	<b>Shipping Address:</b> Geoffrey House Vanwall Business Park Vanwall Road MAIDENHEAD Berkshire SL6 4UB United Kingdom Geoffrey House, Vanw
			<b>Shipping Method:</b> --None--

### Required Modifications

Field	Modification
Currency	
Pricing List	
Reference	
Opened	
Delivery Date	
Status	
Description	
Contact	
Billing Address	
Shipping Address	
Shipping Method	

### New Fields to be added to this screen

Field	Position on Screen

**Order Filter Box**

Status: --All--  
Reference:  
Apply Filter

**Required Modifications**

---

Field	Modification
Status	
Reference	

---

**New Fields to be added to this screen**

---

Field	Position on Screen

---

## Quote and Order List Layout

### Quote List

Status	Reference	Description	Associated document	Include In Quotes Total	Total (\$)
<input type="checkbox"/>	<a href="#">QT-65/1</a>			✓	0.00

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Reference		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Associated Document		Y/N		Y/N	C/L/R	Y/N	Y/N
Include In Quotes Total		Y/N		Y/N	C/L/R	Y/N	Y/N
Total (\$)		Y/N		Y/N	C/L/R	Y/N	Y/N

Order List

Status	Reference	Description	Associated document	Total (\$)
<input type="checkbox"/>	<a href="#">ORD-65/1</a>			0.00

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Reference		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Associated Document		Y/N		Y/N	C/L/R	Y/N	Y/N
Total (\$)		Y/N		Y/N	C/L/R	Y/N	Y/N

## Line Item Screen Layout

Refer to the *5.6 Screen Customization Guide* for details on pre-5.7 Opportunity Item screens, which you can configure your 5.7 system to use if you wish.

### Opportunity Item Detail Box

The screenshot shows a 'New Line Item' form with the following fields and labels:

- Product Family:** A dropdown menu with a search icon.
- Product:** A dropdown menu with a search icon and an asterisk.
- UOM:** A dropdown menu with an asterisk.
- Quantity:** A text input field with a value of '1' and an asterisk.
- List Price:** A text input field with a dollar sign '\$'.
- Quoted Price:** A text input field with a dollar sign '\$' and an asterisk '\*'.
- Line Item Discount:** A text input field with a dollar sign '\$'.

### Required Modifications

Field	Modification
Product Family	
Product	
UOM	
Quantity	
List Price	
Quoted Price	
Line Item Discount	

### New Fields to be added to this screen

Field	Position on Screen

## Line Item List Layout

### Line Item Grid

Line number ^	Product Name	UOM	Quantity	List Price (€)	Quoted Price (€)	Line Item Discount (€)	Quoted Price Sum (€)
1	<a href="#">Training</a>	Week	1	10,000.00	10,000.00	0.00	10,000.00
2	<a href="#">Training</a>	Week	10	10,000.00	10,000.00	0.00	100,000.00

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Line Number		Y/N		Y/N	C/L/R	Y/N	Y/N
Product Name		Y/N		Y/N	C/L/R	Y/N	Y/N
UOM		Y/N		Y/N	C/L/R	Y/N	Y/N
Quantity		Y/N		Y/N	C/L/R	Y/N	Y/N
List Price		Y/N		Y/N	C/L/R	Y/N	Y/N
Quoted Price		Y/N		Y/N	C/L/R	Y/N	Y/N
Line Item Discount		Y/N		Y/N	C/L/R	Y/N	Y/N
Quoted Price Sum		Y/N		Y/N	C/L/R	Y/N	Y/N

# Case Information Management

## Case Screen Layout

### Case Search Screen

The screenshot shows a search interface titled "Find" with a search button and a "--No Search--" dropdown. The search criteria are organized into several rows and columns:

- Row 1: RefId (text input), Priority (dropdown menu), Description (text input), Stage (dropdown menu), Area (dropdown menu), Problem Type (dropdown menu), Status (dropdown menu).
- Row 2: Company Name (text input), First (text input), Last Name (text input), Fix in (dropdown menu).
- Row 3: Assigned To (dropdown menu with search icon), Created By (dropdown menu with search icon), Territory (dropdown menu).

### Required Modifications

Field	Modification
RefId	
Priority	
Description	
Stage	
Area	
Problem Type	
Status	
Company Name	
First	
Last Name	
Fix in	
Assigned To	
Created By	
Territory	

**New Fields to be added to this screen**

Field	Position on Screen

### Case Detail Box

Details			
<b>RefId:</b> 5-10053	<b>Found in:</b> 1.0	<b>SLA:</b> Gold	<b>SLA Severity:</b> Medium
<b>Description:</b> Incorrect rate for francs *	<b>Area:</b> Software	<b>Source:</b> Phone	<b>Customer Ref:</b> 
<b>Fix in:</b> 2.0	<b>Territory:</b> Worldwide		
<b>Created By:</b> Kylie Ward			

### Required Modifications

Field	Modification
RefId	
Found In	
SLA	
SLA Severity	
Description	
Area	
Source	
Customer Ref	
Fix In	
Territory	
Created By	

### New Fields to be added to this screen

Field	Position on Screen

Case Filter Box

Status:  
In Progress ▾

Stage:  
--All-- ▾

Priority:  
--All-- ▾

Territory:  
--All-- ▾

 Apply Filter

Required Modifications

Field	Modification
Status	
Stage	
Priority	
Territory	

New Fields to be added to this screen

Field	Position on Screen

### Case Top Content





	Case: 1-6: Can't connect online Company: Maverick Papers Person: Annette O'Toole	Phone: 1 312 861-1200 E-mail: <a href="mailto:maverick@aol.com">maverick@aol.com</a>
---	--	---

### New Fields to be added to this screen

Field	Position on Screen

Case Web Picker

For

Company:   Person:    New Company  New Person

Required Modifications

Field	Modification
Company	
Person	

New Fields to be added to this screen

Field	Position on Screen

## Case List Layout

### Case Grid

Status ▲	RefId	Priority	Fix In	Company Name	Product	Description	Assigned To	Stage	Territory
<input checked="" type="checkbox"/>	<a href="#">5-1</a>	Normal	2.0	<a href="#">Eurolandia</a>	TimEx Enterprise - Server Lic (\$ 7000)	Default setting change	Kylie Ward	Confirmed	<a href="#">US East</a>
<input checked="" type="checkbox"/>	<a href="#">1-4</a>	Normal	2.0	<a href="#">3G Homes</a>	TimEx Enterprise - Server Lic (\$ 7000)	Will not load any of the software	Kylie Ward	Confirmed	<a href="#">US East</a>
<input checked="" type="checkbox"/>	<a href="#">1-6</a>	Normal	2.0	<a href="#">Maverick Papers</a>	Time Manager - Server License (\$ 5000)	Can't connect online	Graham Rogers	Investigating	<a href="#">US Central</a>
<input type="checkbox"/>	<a href="#">5-2</a>	Normal	3.0	<a href="#">Eurolandia</a>	Time Manager - Server License (\$ 5000)	User Interface	Kylie Ward	Investigating	<a href="#">US East</a>
<input type="checkbox"/>	<a href="#">5-3</a>	Normal	3.0	<a href="#">3G Homes</a>	Time Manager - Server License (\$ 5000)	Incorrect version number.	Kylie Ward	Solved	<a href="#">US East</a>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
RefId		Y/N		Y/N	C/L/R	Y/N	Y/N
Priority		Y/N		Y/N	C/L/R	Y/N	Y/N
Fix In		Y/N		Y/N	C/L/R	Y/N	Y/N
Company Name		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Assigned To		Y/N		Y/N	C/L/R	Y/N	Y/N
Stage		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N

## Case List

This list is displayed in the Cases tab within the context of a Person or Company.

Status ▲	RefId	Priority	Fix in	Person	Product	Description	Assigned To	Stage	Territory	SLA Status
	<a href="#">5-1</a>	Normal	2.0	<a href="#">Kieran O'Toole</a>	TimEx Enterprise - Server Lic (\$ 7000)	Default setting change	Kylie Ward	Confirmed	US East	
	<a href="#">5-2</a>	Normal	3.0	<a href="#">Kieran O'Toole</a>	Time Manager - Server License (\$ 5000)	User Interface	Kylie Ward	Investigating	US East	
	<a href="#">5-10031</a>	Normal	2.0	<a href="#">Garreth McDaid</a>	Expense Check - Server License (\$ 3500)	Error on log out	Graham Rogers	Logged	US East	

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
RefId		Y/N		Y/N	C/L/R	Y/N	Y/N
Priority		Y/N		Y/N	C/L/R	Y/N	Y/N
Fix In		Y/N		Y/N	C/L/R	Y/N	Y/N
Person		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Assigned To		Y/N		Y/N	C/L/R	Y/N	Y/N
Stage		Y/N		Y/N	C/L/R	Y/N	Y/N
Territory		Y/N		Y/N	C/L/R	Y/N	Y/N
SLA Status		Y/N		Y/N	C/L/R	Y/N	Y/N

My Dashboard Case List

RefId	Description	Severity
<a href="#">1-10043</a>	<a href="#">Incorrect user license error</a>	Low
<a href="#">1-7</a>	<a href="#">Custom screen not using normal fonts.</a>	Normal
<a href="#">1-8</a>	<a href="#">Remote connection problems</a>	Normal
<a href="#">5-10025</a>	<a href="#">Server Crash during peak traffic</a>	High
<a href="#">5-10026</a>	<a href="#">Incorrect time for North America</a>	Normal

---

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
RefId		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Severity		Y/N		Y/N	C/L/R	Y/N	Y/N

---

### Solution Cases List

This list is displayed in the Cases tab within the context of a Solution.

RefId	Stage	Status	Description	Remove Link
<a href="#">5-1</a>	Confirmed	Closed	Default setting change	<input type="checkbox"/>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
RefId		Y/N		Y/N	C/L/R	Y/N	Y/N
Stage		Y/N		Y/N	C/L/R	Y/N	Y/N
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Remove Link		Y/N		Y/N	C/L/R	Y/N	Y/N

## Case Summary Report

You can customize the header area of the Case Summary Report output, and also the layout of the Case Tracking and Communication list.

**Case Summary - Incorrect rate for francs**

---

RefId	5-10053	Area	Software
SLA	Gold	SLA Severity	Medium
Person	Clemence Stickings	Company Name	3G Homes
Priority	Normal	Assigned To	Kylie Ward
Stage	Logged	Status	In Progress

**Case Tracking**

Status	Created Date	Created By	Stage	Tracking Note	Duration
In Progress	10/1 1/2/04 18:28	Kylie Ward	Logged		0 Minute(s)
In Progress	10/1 1/2/04 18:28	Kylie Ward	Logged		0 Minute(s)
In Progress	10/1 1/2/04 18:28	System Administrator	Logged		2 Day(s) 21 Hour(s) 20 Minute(s)

**Communications**

Date / Time	Action	Person	Details	User	Territory	Status
01/12/2004 13:50	To Do	Clemence Stickings		System Administrator	U.K.	Pending

Case Summary - Incorrect rate for francs 1

**Case Report Summary Screen**

To customize the header information of the Case Summary Report, select Administration | Customization | Case | Screens and select the Case Report Summary screen.

RefId	5-10056	Area	
SLA	Gold	SLA Severity	Medium
Person	Reg Barrow	Company Name	Design Right Inc.
Priority	Normal	Assigned To	Kylie Ward
Stage	Investigating	Status	In Progress

**Required Modifications**

Field	Modification
RedId	
Area	
SLA	
SLA Severity	
Person	
Company Name	
Priority	
Assigned To	
Stage	
Status	

**New Fields to be added to this screen**

Field	Position on Screen

### Case Summary Report Case Tracking

To customize the layout of the Cases Tracking list on the Case Summary Report, select Administration | Customization | Case | Summary Reports and select the Case Tracking hyperlink.

#### Case Tracking

Status	Created Date	Created By	Stage	Tracking Note	Duration
In Progress	07/11/2013 17:25	KYLE WATKINS	Open		2 Mins
In Progress	07/11/2013 17:24	SYSTEM ADMINISTRATOR	Open		2 Mins
In Progress	07/11/2013 17:26	SYSTEM ADMINISTRATOR	Investigating		1 Day 18 Hour 15 Mins
In Progress	12/11/2013 06:20	KYLE WATKINS	Investigating		2 Mins

#### Required Modifications

Column	Modification
Status	
Created Date	
Created By	
Stage	
Tracking Note	
Duration	

## Case Summary Report Communications

To customize the layout of the Communication list on the Case Summary Report, select Administration | Customization | Case | Summary Reports and select the Communication hyperlink.

### Communications

Date / Time	Action	Person	Details	User	Territory	Status
31/12/2004 13:50	To Do	Clemence Stickings		System Administrator	U.K.	Pending

### Required Modifications

Column	Modification
Date / Time	
Action	
Person	
Details	
User	
Territory	
Status	

## Solutions Screen Layout

### Solutions Search Screen

The screenshot shows a search interface titled "Find". It includes a "Description:" text input field, a "Details:" text area with a vertical scrollbar, and two radio buttons labeled "Exact" and "Contains". To the right, there are four filter controls: "Area:" and "Stage:" are dropdown menus currently set to "--All-"; "Reference Id:" and "Status:" are text input fields.

### Required Modifications

Field	Modification
Description	
Area	
Reference Id	
Details	
Stage	
Status	

### New Fields to be added to this screen

Field	Position on Screen

Solutions Entry Screen

The screenshot shows a 'Details' tab in a software interface. It contains the following fields:

- Reference Id:** 1-10039
- Area:** A dropdown menu currently showing '--None--'.
- Description:** A text input field with an asterisk (\*) indicating it is required.
- Details:** A multi-line text area with a vertical scrollbar and an asterisk (\*) indicating it is required.
- Team:** A dropdown menu currently showing '--None--'.

Required Modifications

Field	Modification
Reference Id	
Area	
Description	
Details	
Team	

New Fields to be added to this screen

Field	Position on Screen

### Solutions Filter Box

**Stage:**  
--All--

**Status:**  
--All--

 Apply Filter

### Required Modifications

---

Field	Modification
Stage	
Status	

---

### New Fields to be added to this screen

---

Field	Position on Screen

---

**Solutions Top Content**



**New Fields to be added to this screen**

---

Field	Position on Screen

---

## Solutions List Layout

### Cases Solution List

This list is displayed in the Solutions tab within the context of a Case.

Reference Id	Description	Status	Stage	Remove Link
<a href="#">5-10020</a>	Export to excel - excel not installed	Not Published	Reviewed	<input type="checkbox"/>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Reference Id		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Stage		Y/N		Y/N	C/L/R	Y/N	Y/N
Remove Link		Y/N		Y/N	C/L/R	Y/N	Y/N

**Solution List**

This list is displayed in the Solutions tab of My CRM.

Status ^	Reference Id	Stage	Status	Area	Description
<input type="checkbox"/>	<a href="#">5-10017</a>	Draft	Not Published	Software	How do I run a monthly expense report ?
<input type="checkbox"/>	<a href="#">5-10019</a>	Reviewed	Not Published	Software	Incorrect password on login
<input type="checkbox"/>	<a href="#">5-10020</a>	Reviewed	Not Published	Software	Export to excel - excel not installed
<input type="checkbox"/>	<a href="#">5-10021</a>	Draft	Not Published	Database	Invalid report column

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Reference Id		Y/N		Y/N	C/L/R	Y/N	Y/N
Stage		Y/N		Y/N	C/L/R	Y/N	Y/N
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Area		Y/N		Y/N	C/L/R	Y/N	Y/N
Description							

### Solutions Grid

This list is displayed as the result of searching for a Solution.

Status ^	Reference Id	Stage	Status	Description
<input type="checkbox"/>	<a href="#">5-10017</a>	<a href="#">Draft</a>	<a href="#">Not Published</a>	<a href="#">How do I run a monthly expense report ?</a>
<input type="checkbox"/>	<a href="#">5-10018</a>	<a href="#">Reviewed</a>	<a href="#">Not Published</a>	<a href="#">How do I create a relative report ?</a>
<input type="checkbox"/>	<a href="#">5-10019</a>	<a href="#">Reviewed</a>	<a href="#">Not Published</a>	<a href="#">Incorrect password on login.</a>
<input type="checkbox"/>	<a href="#">5-10020</a>	<a href="#">Reviewed</a>	<a href="#">Not Published</a>	<a href="#">Export to excel - excel not installed.</a>
<input type="checkbox"/>	<a href="#">5-10021</a>	<a href="#">Draft</a>	<a href="#">Not Published</a>	<a href="#">Invalid report column.</a>

Field	Position	Order By	Hyperlink to	Order Desc	Align	Show Heading	Gif
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Reference Id		Y/N		Y/N	C/L/R	Y/N	Y/N
Stage		Y/N		Y/N	C/L/R	Y/N	Y/N
Status		Y/N		Y/N	C/L/R	Y/N	Y/N
Description		Y/N		Y/N	C/L/R	Y/N	Y/N

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