



CRM with SkyViewCRM

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SkyViewCRM

CRM with SkyViewCRM

af SkyViewCRM

The document you now hold is a pdf version of the interactive help that comes with SkyViewCRM .

Here - on paper - you can leisurely browse "it all" without having to sit at the computer . On the other hand , the interactive version better when it comes to finding acute help areas in SkyViewCRM .

You get to the interactive help by clicking on Help buttons in the CRM application or by visiting www.skyviewcrm.com/help

CRM med SkyViewCRM

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Managing Editor

Jens Bo Frederiksen

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Foreword

You have just bought - or are thinking of buying - access to the SkyViewCRM system. We assume that you have come this far because you see the need to improve efforts when it comes to selling more, better and faster. Perhaps also to provide better customer service to your existing customers, ensuring your business better .

Do you recognize yourself in the above you on the right path. CRM is the way forward when it comes to upgrading your sales - and SkyViewCRM is the most effective way to CRM.

To get the best out of CRM - as quickly as possible - it might be a good idea to get an overview of the features found in the system. This guide is suitable for this.

All information in this guide is also available online at SkyViewCRM web pages. The online version is better when it comes to quickly find help for a specific area. You reach the online help by visiting the website www.skyviewcrm.com or by simply clicking the help buttons from within SkyViewCRM system.

Happy reading!

Overview

Part



1

1 Overview

This is a combined guide and on-line help for SkyViewCRM from the company SkyViewCRM ApS

In this help you may see screenshots containing data from the real world. This is coincidental and in no way reflects any business relationship between SkyViewCRM and these companies.

Screenshots may contain text in different languages. In real use SkyViewCRM adapts to the language og choice (English or Danish) as setup in your browser.



Start SkyViewCRM

Part

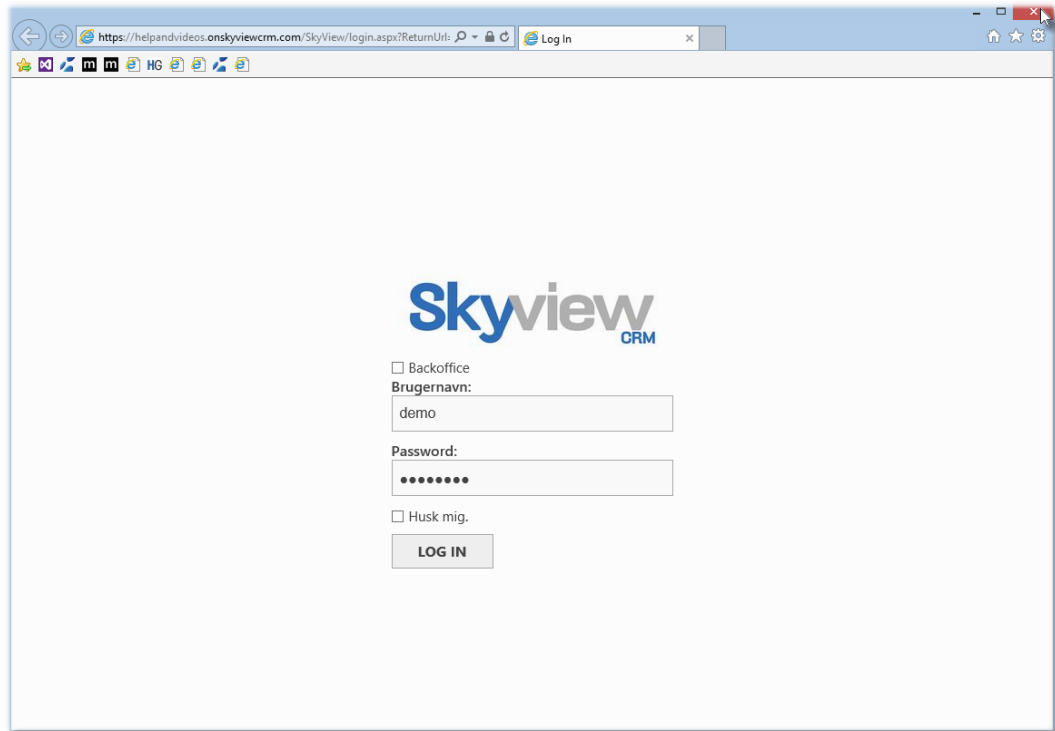


2

2 Start SkyViewCRM

You start SkyViewCRM using your browser of choice

1. Go to the address "http://yoursite.onskyviewcrm.com". Either by typing in the address directly or by using the link you received as part of your welcome e-mail. (The part that reads "yoursite" will have to be exchanged for the sitename specified for your site).
2. Press the ENTER button and you will see a screen like this:



1. Key in your credentials as given in your welcome e-mail or by your CRM administrator.
2. Click the LOG IN button and your CRM system will open.
3. In case you need to use the Backoffice functionality, place a check mark here before clicking LOG IN.

Homepage and menu

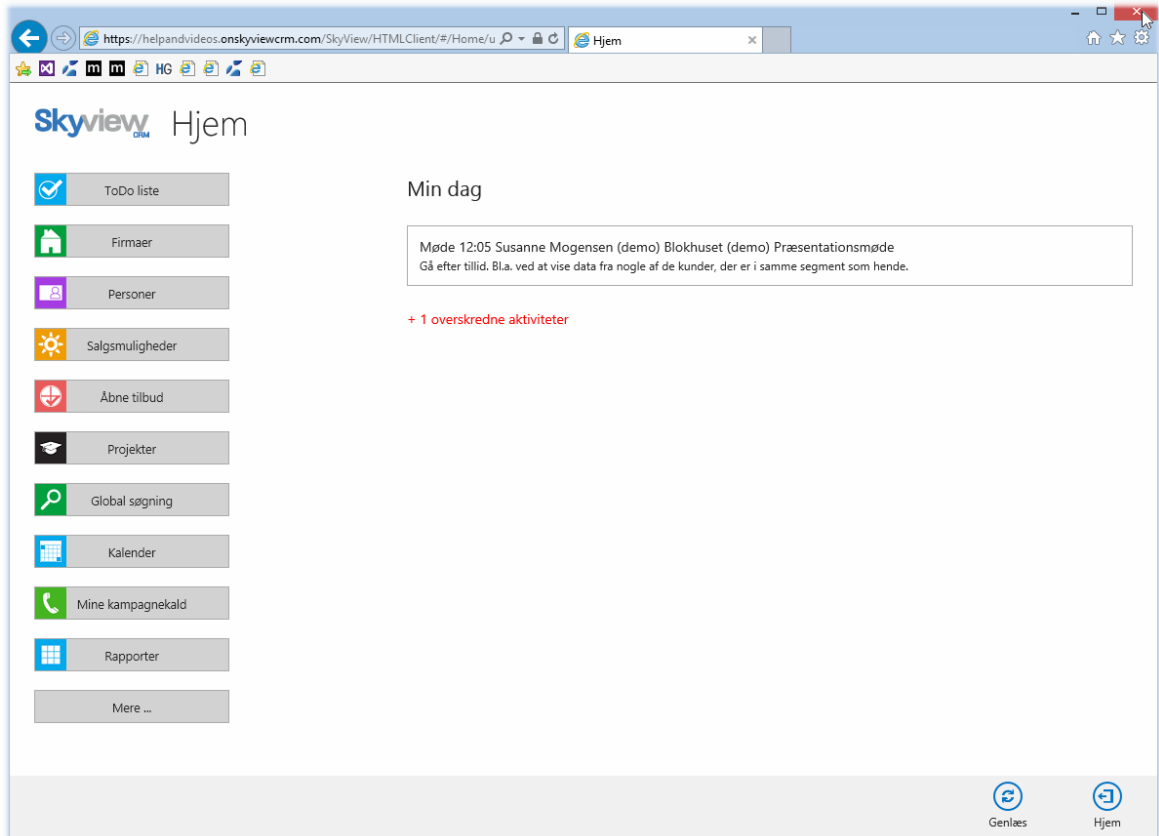
Part



3

3 Homepage and menu

Logging On to SkyViewCRM will always bring you to the home screen as shown below. From this screen you will have easy access to most features that will enable your work.



ToDo list	Here you will find a list of all - non-completed - activities having you as a participant.
Companies	Search for companies based on one or more criteria.
Contacts	Search for contact-persons.
Opportunities	Search for Sales Opportunities.
Open Quotes	Search for Open Quotes.
Projects	Search for Projects based on one or more criteria.
Global Search	Full Text Search in all types of entities as well as in document content.
Calendar	Your calendar (initially Work Week) as well as a Group Calendar.
My Campaign	View tailored for efficient call related work basen on one or more campaigns.

Calls**Reports** Opens a menu specifically for report selection.**More ...** Opens Menu2 for more choices.

Your Home Page also displays a list of todays open activities having you as a participant and possibly a text showing the number of overdue activities.

All fields are dynamic links.

Navigation, buttons and menus

Part



4

4 Navigation, buttons and menus

All-though SkyViewCRM is designed to be easy to use and to follow common use patterns, some general principles may be useful to know.

If you are the "I always read the manual"-type please read ahead. If not - skip this chapter.

Navigation

Anywhere the cursor turns into a hand, you may click and open details on the subject related to the link. As an example a list of companies will always give access to detailed information on the individual companies in the list.

Buttons

Screens may provide buttons in the four corners:

Top Left

Often you will here see a the SkyViewCRM logo. Click on this and you will go directly to the Home Page.

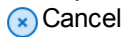
Top Right

Here you will find one or two buttons.



Save

The Save button will save the content of your current edits and navigate to the screen from where you initiated the edit. After clicking Save, all your data is saved and you can close SkyViewCRM.



Cancel

Cancel will cancel all your current edits and navigate to the screen from where you initiated the edit.



OK

Confirms some changes that form part of a larger edit operation. OK will not in itself save data. The data will be saved only when you eventually click Save on the screen from where the edit operation was initiated.

Bottom Left

In this corner only one button is possible.



Help

This button will open context sensitive help in a new browser tab or window.

Bottom Right

Here you will see buttons related to functions on the current screen. These buttons may be very specific, but some general types are:



Create or add

This will most often create a new element of the type displayed in list form just above the buttons. If the list is composed of companies, the button will add a new company.



Back

This button navigates backward towards the Home Page. You may also use the back button on your browser to do this, but using the SkyViewCRM back button checks for possible un-saved data before commencing.

 More

This button is useful when more functions are available. The button is often used on screens on devices with limited screen estate. Like phones.

 New activity

Use this button to create a new activity (meeting, call, letter, ...) linked to the context on which the button appear. Used on a contact person the newly created activity will be linked to the contact as well as to the company employing the contact.

 Create Word

This will create a Microsoft Word document based on a merge template. Almost any kind of related (based on the context on which the button appear) data can be merged into the document.

 Create e-mail

Analog to the "Create Word" button, but here we will use a template based on Microsoft Outlook to create the e-mail.

 Upload

Select and upload/store any document as part of a Document Activity linked to the context on which the button appear.

The ToDo list

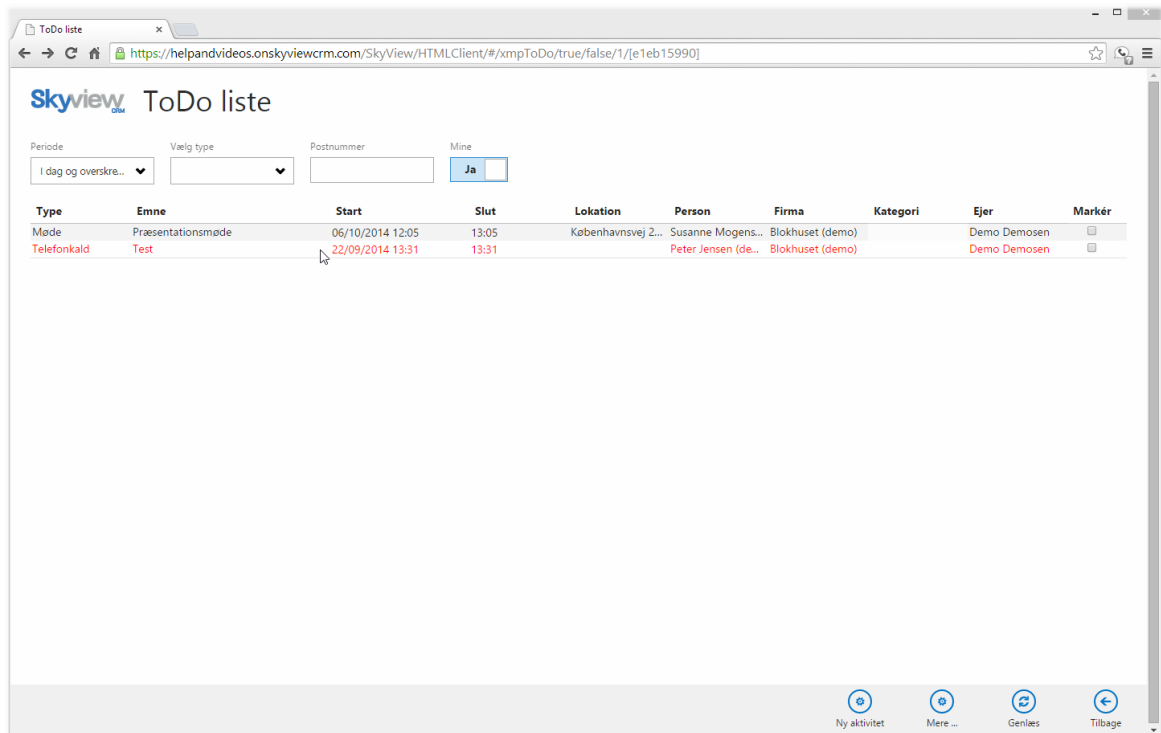
Part



5

5 The ToDo list

On the Home Page click the "ToDo list" button:



In this list you will see all planned (not completed) activities. Filtered by "Mine" only activities having you as a participant will be shown.

You may also create new activities from the ToDo list. Doing so will however create an "empty" activity - linked to nothing, and you will have to select the relevant company/contact/... within the activity screen. As an alternative you may find it more efficient to create activities from the context in which they are to exist. As an example from a Contact person or from an Opportunity

Activities in the ToDo list will open by click. Activities still open will by default open for edit. Activities of type Note, Internal document and Personal will always open for direct edit.

Using the ToDo list you will never forget appointments or other important jobs to do.

Calendar

Part



6

6 Calendar

Home Page | Calendar will bring you to your calendar:

The screenshot shows the SkyView CRM calendar interface. At the top left, it says 'Skyview Kalender'. Below that, there are links for 'Min kalender' and 'Gruppekalendar'. The current date range is '6 - 12. okt 2014'. The calendar is displayed in a weekly view with columns for each day from Monday to Sunday. The time slots range from 6:00 to 18:00. A meeting titled '12:30 - Opdragning' is scheduled for Tuesday, October 7th, from 12:30 to 14:00. A presentation titled '15:00 - 16:00 Præsentationsmøde' is scheduled for Monday, October 6th, from 15:00 to 16:00. The interface includes navigation buttons for 'Dag', 'Uge', 'Måned', and 'Idag', and a date range '6 - 12. okt 2014'. At the bottom right, there are buttons for 'Genlæs' and 'Tilbage'.

Here you see the calendar in work week view, but you can choose day and month as well.

Any activity can be opened by click. If you let the cursor hover atop an activity, details from the activity will show as hint.

A new meeting activity can be created by clicking or dragging an empty area in the calendar.

If you have opted for the Exchange sync, this calendar will be kept in sync with your Outlook calendar.

A Goup Calendar view is also available. The group calendar view is not directly editable.

Infotags

Part

7

7 Infotags

Infotags is information stickers (or labels) you can put on anything in SkyViewCRM and thereby making it easy to find or select items later.

Infotags are selected from pick-lists designed by you individually for the item types. Item types can be:

- Activities
- Companies
- Contact persons
- Projects
- Opportunities
- Contracts
- Campaigns

An Infotag can be labeled as Inactive in the sense that it can be used to select items - but that it cannot be applied to new items. This may come handy if (as an example) you have an Infotag "IT-Exhibition 2013" to mark contacts that you met during this exhibition.

Later on you may have a need for selecting those contacts, but you can mark the Infotag as Inactive to ensure that it is not applied to new contacts later on.

Other examples:

"Subscription Yearly", "Subscription Monthly", "Medico 2014", "Uses outsourcing", "Ads in Magazines", "TV commercials", "Newsletter" etc.

Correspondingly for other entity types:

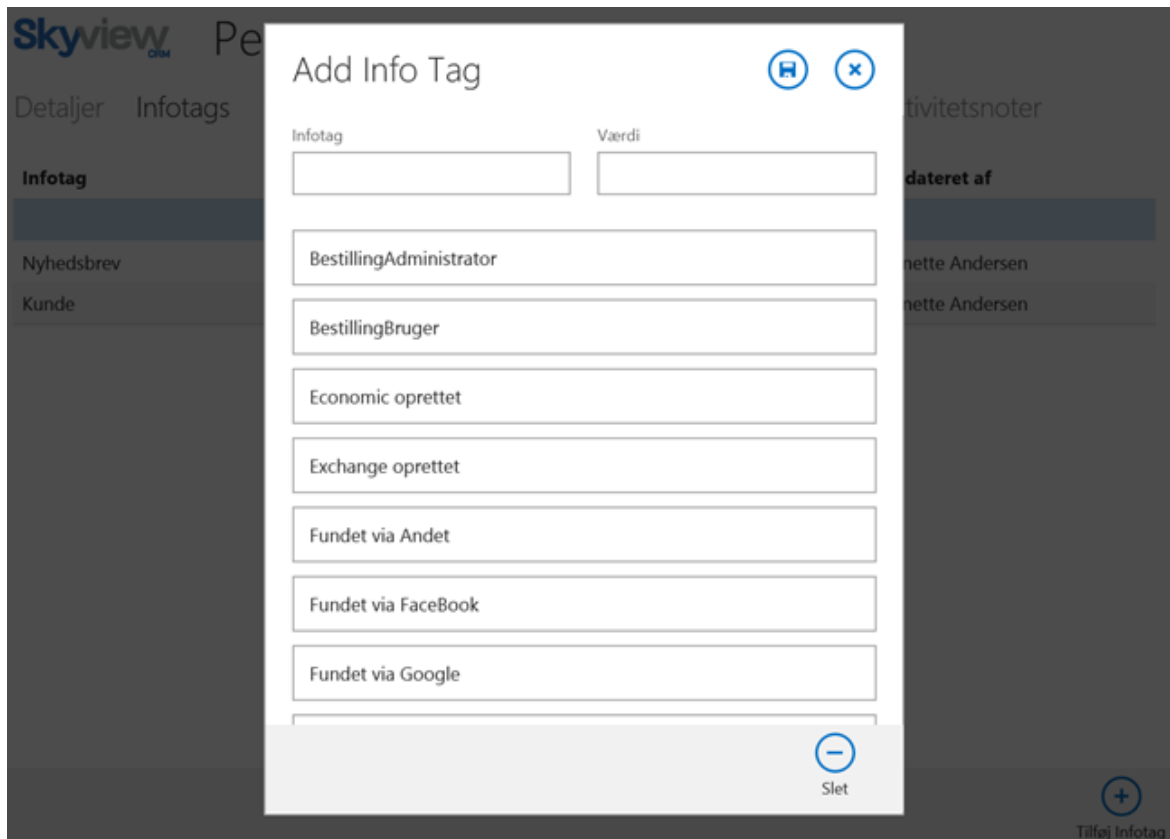
- Contact person: "Christmas card", "Christmas lunch", "Soccer", Golf"
- Project: "Pre analysis"
- Activity: "Service", "Customer Question", "Warranty"

Often you will use Infotags to mark contact persons that may qualify for one or more campaigns.

Use

Infotags can be applied to contacts (and other entity types) in various ways. Here are some examples:

1. If the current screen is a contact person then click the tab Infotag and then the button "Add Infotag". Select the Infotag from the pick list and the Save.



2. Choose "Contact persons" in the main menu and make a list of contacts by one or more criteria. In this list you may select any set of contacts, click the button "More" and then click "Add Info Tag to selected contacts".

Skyview CRM Personer

Navn Mine Ja Titel Firmanavn Ejer

Infotag

Fornavn	Efternavn	Kaldena	Titel	Firma	Jobfunk	E-mail- adresse	Telefon direkte	Telefon mobil	Ansv.	Markér
Anders	And			Firma...	Sevices...				Peter G...	<input type="checkbox"/>
Anders...	And		Fru	Firma...			123456...		Peter G...	<input checked="" type="checkbox"/>
Annette	Anders...			DTM In...		aa@dt...			Peter G...	<input type="checkbox"/>
Bjørn	Berthe...			Art Gal...					Peter G...	<input type="checkbox"/>
Poul	Bigspe...			Fat cat	CEO	pg@dt...	234768...		Peter G...	<input checked="" type="checkbox"/>
Henrik	Bøg			Måske...	CEO				Peter G...	<input checked="" type="checkbox"/>
Lotte	Christi...	L-C	CSO	A Kapit...	CSO	lc@kap...			Peter G...	<input type="checkbox"/>
	e			Firma...					Peter G...	<input type="checkbox"/>
Anders	Fiskem...			Sildeko...		pg@dt...	123456...	098765...	Peter G...	<input type="checkbox"/>
Annette	Grønd...	AA	Fr.	Grønd...	Manag...	annett...			Peter G...	<input type="checkbox"/>
Peter	Grønd...	PG	CEO	DTM In...	Manag...	pg@dt...			Peter G...	<input type="checkbox"/>
Peter	Grønd...			Store s...	CEO	pg@dt...			Peter G...	<input type="checkbox"/>
Hans	Hansen			Art Gal...					Peter G...	<input type="checkbox"/>
Palle	Hurtig...			Hurtig...	Manag...	pg@dt...			Peter G...	<input type="checkbox"/>
Brian	Knudsen		CEO	Firma...	Manag...	p@d.dk		234567...	Peter G...	<input type="checkbox"/>
Børge	Knudsen		Adm. d...	A Kapit...		bk@ka...			Peter G...	<input type="checkbox"/>
Palle	Langsom			Hurtig...					Peter G...	<input type="checkbox"/>
Lars	Lastopt...			Sildeko...					Peter G...	<input type="checkbox"/>
Niels	Nielsen			Nordea					Peter G...	<input type="checkbox"/>
Peter	Nielsen		CEO	Grønd...	CEO	peter...		401345...	Peter G...	<input type="checkbox"/>
Peter	Pan			Test sra						
Søren	Sælger		Salgsdi...	SkyVie...						
Joachim	Von And		rigmand							
Joachim	Von And		Tegnes...	Firma...		joachi...	2			

Hjælp Tilføj Tilbage

Search

Part



8

8 Search

Very often you will find data ready in the context they appear. Activities will show in your ToDo list and your calendar. Or they may show related to the company you are viewing. This is so because all data in SkyViewCRM is connected (linked): Contact persons are related to their employing company. Activities are related to the participating contacts. Or to the Quote that was sent by the activity.

At other times you may need to search for specific items (companies, contact persons, projects, ...). This is done by the search screens:

[Search for companies](#)

[Search for contact persons](#)

[Search for projects](#)

Search for companies

The search screen "Companies" is selected from the Home Page. This list will initially be empty, but any search criteria entered will result in showing all companies corresponding to the criteria.

Firma	Afdeling	Gade1	Postnummer	By	Telefon	Mail	Web	Prioritet	Land	KAM	Prim relation	Sek relation	Primær kontakt	Markér
Blokhuset (demo)	Teknisk afd.	Københavns...	3460	Birkerød	+45 45899899				Denmark	Demo Demo...	Kunde		Peter Jensen...	<input type="checkbox"/>
Gardinfirmaet A/S (demo)	Salg	Bellemosen 27	1200	København K	+45 45895899				Denmark	Demo Demo...	Kunde		Anne Anders...	<input type="checkbox"/>
Jernmanden IS (demo)	Salg	Frederiksgad...	1200	København K	+45 45895899				Denmark	Demo Demo...	Kunde		Anne Jørgen...	<input type="checkbox"/>
Lampedusakompagniet IS (d...	Salg	Kongevejen ...	1200	København K	+45 45895899				Denmark	Demo Demo...	Kunde		Jens Mikkels...	<input type="checkbox"/>
Måneskinshuset A/S (demo)	Salg	Jægersborgv...	1200	København K	+45 45895899				Denmark	Demo Demo...	Kunde		Jørgen Eiler (...)	<input type="checkbox"/>
Telemarketingbureauet KS (...)	Salg	Herredsvejen...	1200	København K	+45 45895899				Denmark	Demo Demo...	Kunde			<input type="checkbox"/>
Trykkeriet A/S (demo)	Salg	Juelsvej 77	1200	København K	+45 45895899				Denmark	Demo Demo...	Kunde		Melissa Sune...	<input type="checkbox"/>
Trætoppen ApS (demo)	Salg	Roskildevej 27	1200	København K	+45 45895899				Denmark	Demo Demo...	Kunde		Søren Peters...	<input type="checkbox"/>
Tæppehuset ApS (demo)	Salg	Jørnevej 33	1200	København K	+45 45895899				Denmark	Demo Demo...	Kunde			<input type="checkbox"/>
Østasiatisk Ølkompani AS (...)	Salg	Kongens Nyt...	1200	København K	+45 45895899				Denmark	Demo Demo...	Kunde		Bent Boldtse...	<input type="checkbox"/>

Companies in the list can be viewed by clicking the row.

Search for contact persons

The list "Contact persons" is selected on the home page. Initially the list is empty, but enter any criteria and the resulting persons are shown.

Fornavn	Efternavn	Kaldenavn	Titel	Firma	Jobfunktion	E-mail-adresse1	Telefon direkte	Telefon mobil	Ansv.	Marker
Anne	Andersen (demo)		Salgschef	Gardinfirmaet A/S (d...			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Charlotte	Boilesen (demo)		CEO	Trykkeriet A/S (demo)			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Bent	Boldtsen (demo)		CEO	Østasiatisk Oikempa...			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Jørgen	Eiler (demo)		Business Manag	Måneskinshuset A/S...			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Gitte	Elling (demo)		Area Sales	Blokhuset (demo)			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Peter	Jensen (demo)		CEO	Blokhuset (demo)			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Erling	Jepsen (demo)		Area Sales	Blokhuset (demo)			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Anne	Jørgensen (demo)		Konsulent	Jernmanden IS (dem...			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Jette	Mehlsen (demo)		CEO	Trætoppen ApS (de...			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Jens	Mikkelsen (demo)		Indkøbschef	Lampedusakompag...			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Susanne	Mogensen (demo)		Salgsdirektør	Blokhuset (demo)			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Søren	Petersen (demo)		Marketingdirektør	Trætoppen ApS (de...			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Melissa	Sunesen (demo)		Salgskonsulent	Trykkeriet A/S (demo)			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Børge	Sørensen (demo)		Salgschef	Blokhuset (demo)			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>
Astrid	Virk (demo)		Indkøbsdirektør	Blokhuset (demo)			+45 65657876	+45 88998877	Demo Demosen	<input type="checkbox"/>

Search Opportunities

Open Quotes

Projects

The list "Projects" is selected on your home page. Use this list to search for projects by criteria.

Emne	Firma	Person	Projekttype	Projektansvarlig	Afsluttet
Forundersøgelse (demo)	Blokhuset (demo)	Erling Jepsen (demo)	Forundersøgelse	Demo Demosen	Lukket
Implementering (demo)	Blokhuset (demo)	Børge Sørensen (demo)	Implementering	Demo Demosen	Åben

Base data

Part



9

9 Base data

Data for the base entities are shown and edited in tailored screens. One screen for viewing data on a specific company. And another screen for editing data on the same company.

- Read Views are for viewing data and for adding related data to the item.
Example: View data on a contact person - and add a new activity for calling this contact.
- Edit Views are for editing base data.
Example: Edit the e-mail-address for the contact person.

Company edit

The screenshot shows the 'Redigér Firma' (Edit Company) interface. The browser address bar indicates the URL: [https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/EditCompany/guid'cd379a7c-3981-47f4-bba5-daf536e71ff2'/\[bb94efe12\]](https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/EditCompany/guid'cd379a7c-3981-47f4-bba5-daf536e71ff2'/[bb94efe12]). The page title is 'Redigér Firma'. Below the title, there are tabs for 'Detaljer' and 'Mere ...'. The form is organized into several sections:

- Company Name:** 'Firma' field contains 'Blokhuset (demo)'. 'KAM' field is empty.
- Address:** 'Afdeling' is 'Teknisk afd.', 'Gade1' is 'Københavnsvvej 23', 'Gade2' and 'Gade3' are empty.
- Postcode and City:** 'Postnummer' is '3460', 'By' is 'Birkerød', 'Stat' is empty.
- Country:** 'Land' is 'Denmark'.
- Contacts:** 'Prim relation' is 'Demo Demosen', 'Sek relation' is 'Kunde', 'Primær kontakt' is 'Peter Jensen (demo)', 'Moterselskab' is 'Søg'.
- Phone and Fax:** 'Telefon' is '+45 45899899', 'Fax' is empty.
- Other Fields:** 'Omsætning' is '10,000', 'Ansatte' is '40', 'Kundenummer' and 'Potentiale' are empty.

At the bottom of the screen, there is a navigation bar with icons for 'Nyt aktivitet', 'Opret Word', 'Opret e-mail', 'Upload', and 'Slet'.

Company view

Skyview Blokhuset (demo)

Detaljer Personer Organisation Infotags Salgsmuligheder Kampagner NACE Projekter Aktivitetsnoter

Firma **Blokhuset (demo)** KAM Demo Demosen Telefon +45 45899899
 Afdeling Teknisk afd. Prim relation Kunde Fax
 Gade1 Københavnsvej 23 Sek relation Mail
 Gade2 Potentiale Web
 Gade3 Primær kontakt Peter Jensen (demo) Besøgsadresse
 Postnummer 3460 Moderselskab Omsætning Ansatte
 By Birkerød Prioritet Importnøgle
 Stat CVR
 Land Danmark Kundennummer
 Noter

Aktiviteter

Start	Type	Emne	Ejer	Person	Projekt	Afslutte
07-10-2014 12:30:00	Telefonkald	Opfølgning	Demo Demosen	Susanne Mogensen (demo)		<input type="checkbox"/>
06-10-2014 15:00:00	Møde	Præsentationsmøde	Demo Demosen	Susanne Mogensen (demo)		<input type="checkbox"/>
04-10-2014 09:58:17	Telefonkald	Introduktion	Demo Demosen	Susanne Mogensen (demo)		<input checked="" type="checkbox"/>
22-09-2014 13:31:00	Telefonkald	Test	Demo Demosen	Peter Jensen (demo)		<input checked="" type="checkbox"/>

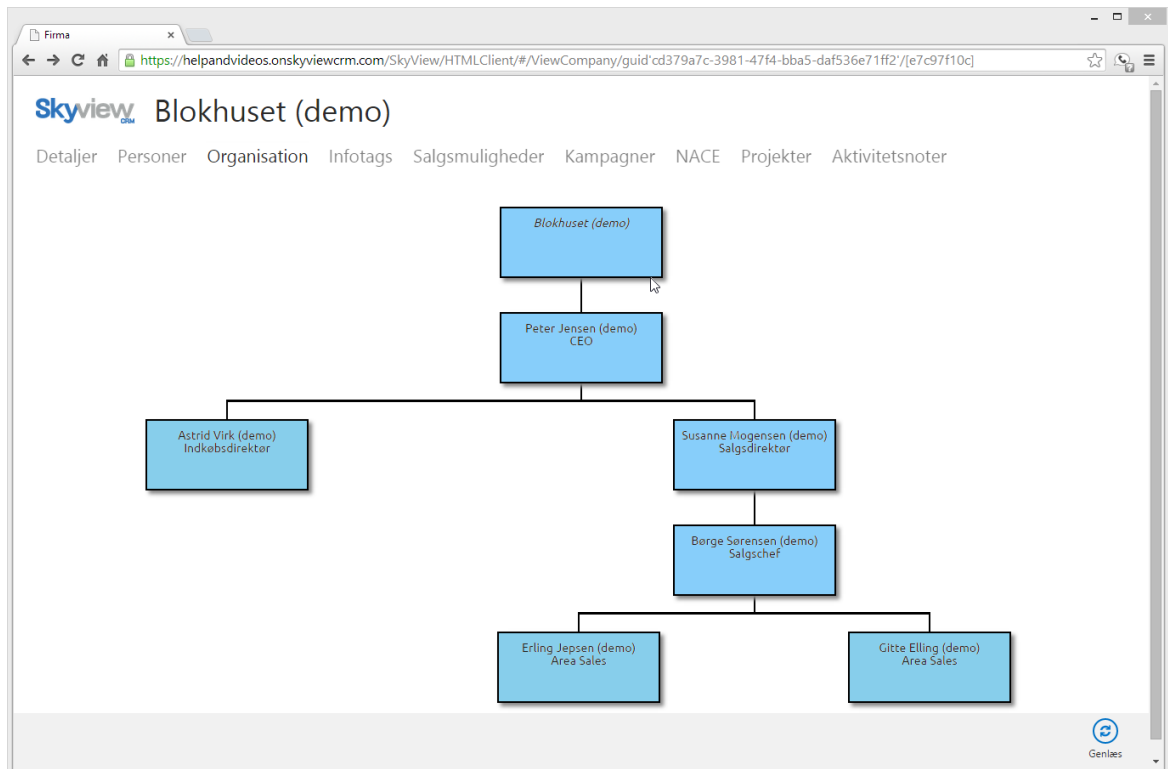
Redigér Ny aktivitet Opret Word Opret e-mail Upload Kort Vis vej Tilbage

Skyview Blokhuset (demo)

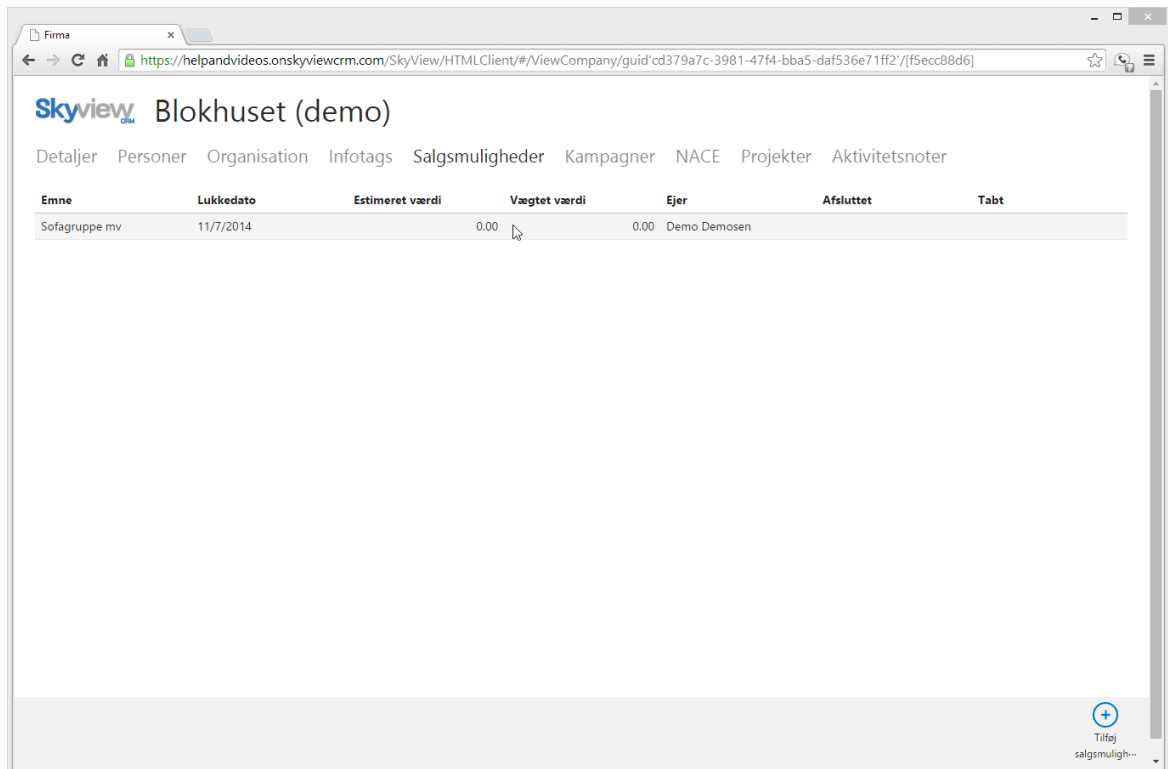
Detaljer Personer Organisation Infotags Salgsmuligheder Kampagner NACE Projekter Aktivitetsnoter

Fornavn	Efternavn	Titel	Chef	Ansv.
Astrid	Virik (demo)	Indkøbsdirektør	Peter Jensen (demo)	Demo Demosen
Peter	Jensen (demo)	CEO		Demo Demosen
Susanne	Mogensen (demo)	Salgsdirektør	Peter Jensen (demo)	Demo Demosen
Erling	Jepsen (demo)	Area Sales	Børge Sørensen (demo)	Demo Demosen
Gitte	Elling (demo)	Area Sales	Børge Sørensen (demo)	Demo Demosen
Børge	Sørensen (demo)	Salgschef	Susanne Mogensen (demo)	Demo Demosen

Ny person



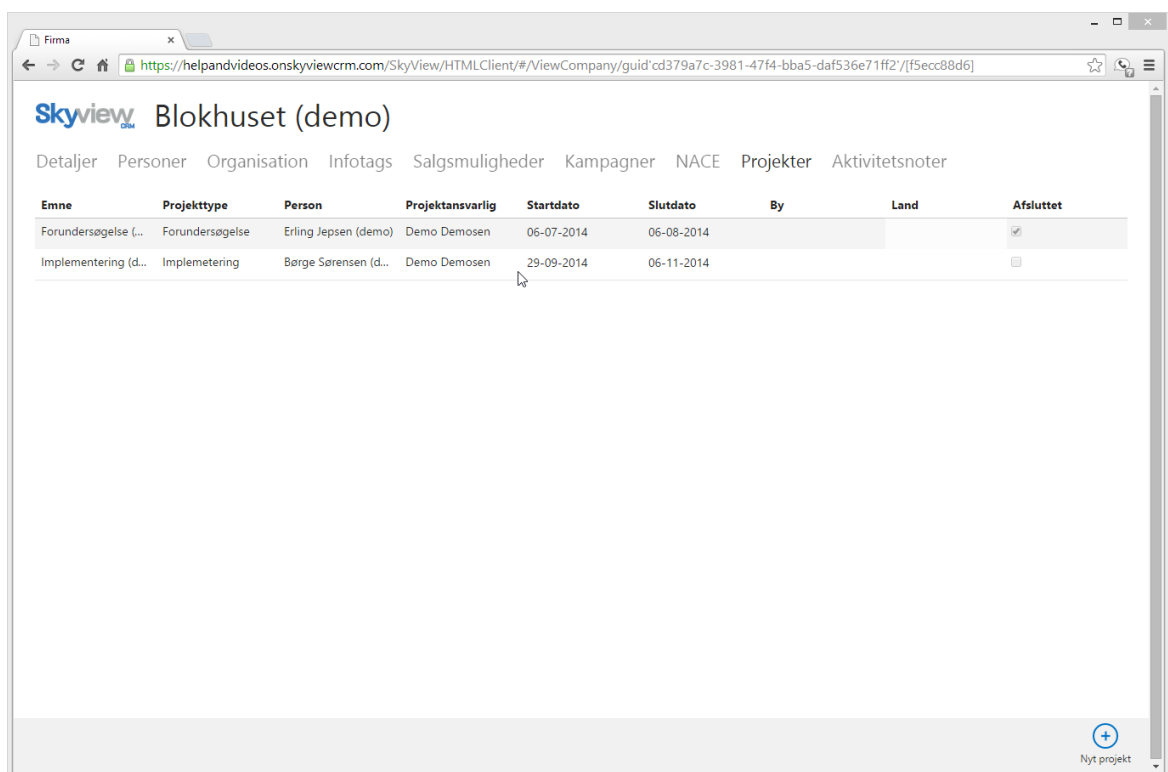
Infotag	Værdi	Opdateret	Opdateret af
Messe.2012		07-10-2014 11:53:31	Demo Demosen
Korrespondance.Prislister		07-10-2014 11:53:27	Demo Demosen



The screenshot shows a web browser window with the URL <https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/ViewCompany/guid'cd379a7c-3981-47f4-bba5-daf536e71ff2'/{f5ecc88d6}>. The page title is "Skyview Blokhuset (demo)". Below the title are navigation tabs: "Detaljer", "Personer", "Organisation", "Infotags", "Salgsmuligheder", "Kampagner", "NACE", "Projekter", and "Aktivitetsnoter". The "Salgsmuligheder" tab is active, displaying a table with the following data:

Emne	Lukkedato	Estimeret værdi	Vægtet værdi	Ejer	Afsluttet	Tabt
Sofagrube mv	11/7/2014	0.00	0.00	Demo Demosen		

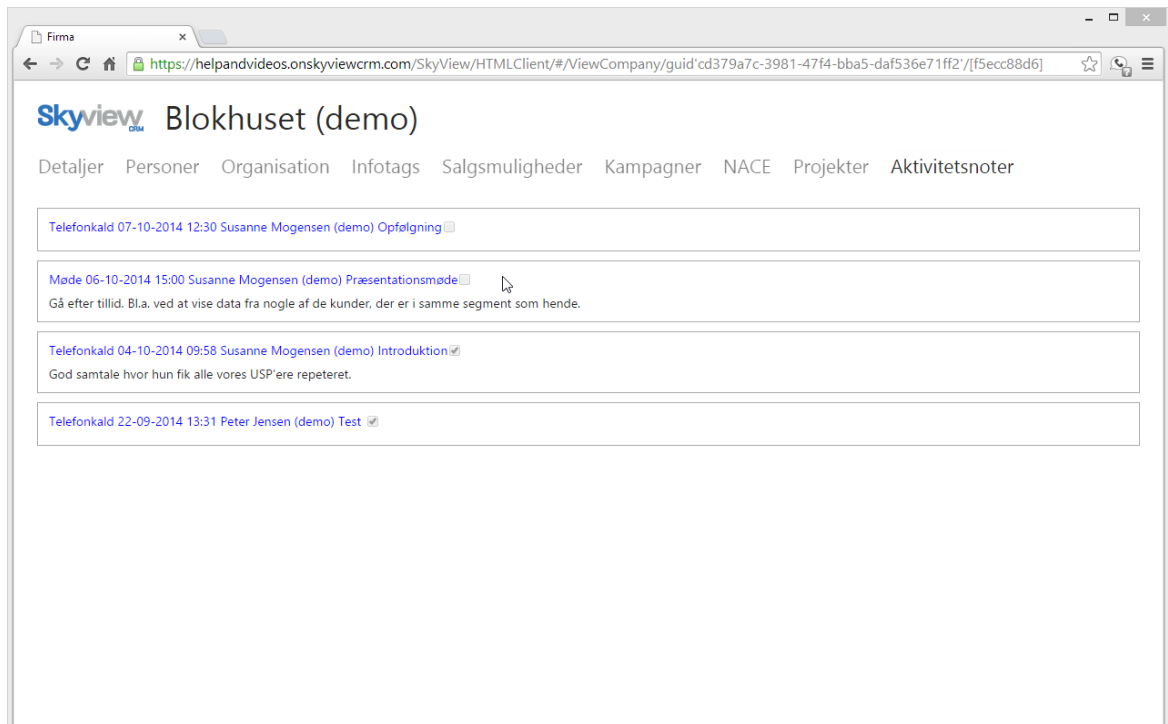
At the bottom right of the interface, there is a button with a plus sign and the text "Tilføj salgsmuligh..." (Add sales opportunity...).



The screenshot shows the same web browser window as above, but with the "Projekter" tab selected. The page title remains "Skyview Blokhuset (demo)". The navigation tabs are the same. The "Projekter" tab is active, displaying a table with the following data:

Emne	Projekttype	Person	Projektansvarlig	Startdato	Slutdato	By	Land	Afsluttet
Forundersøgelse (...)	Forundersøgelse	Erling Jepsen (demo)	Demo Demosen	06-07-2014	06-08-2014			<input checked="" type="checkbox"/>
Implementering (d...)	Implementering	Børge Sørensen (d...)	Demo Demosen	29-09-2014	06-11-2014			<input type="checkbox"/>

At the bottom right of the interface, there is a button with a plus sign and the text "Nyt projekt" (New project).



The screenshot shows a web browser window with the URL [https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/ViewCompany/guid'cd379a7c-3981-47f4-bba5-daf536e71ff2/\[f5ecc88d6\]](https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/ViewCompany/guid'cd379a7c-3981-47f4-bba5-daf536e71ff2/[f5ecc88d6]). The page title is "Skyview Blokhuset (demo)". Below the title is a navigation menu with the following items: "Detaljer", "Personer", "Organisation", "Infotags", "Salgsmuligheder", "Kampagner", "NACE", "Projekter", and "Aktivitetsnoter".

The main content area displays a list of activities:

- Telefonkald 07-10-2014 12:30 Susanne Mogensen (demo) Opfølgning
- Møde 06-10-2014 15:00 Susanne Mogensen (demo) Præsentationsmøde
Gå efter tillid. Bl.a. ved at vise data fra nogle af de kunder, der er i samme segment som hende.
- Telefonkald 04-10-2014 09:58 Susanne Mogensen (demo) Introduktion
God samtale hvor hun fik alle vores USP'ere repeteret.
- Telefonkald 22-09-2014 13:31 Peter Jensen (demo) Test

Contact edit

Edit Contact

https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/EditContact/guid'2a460b83-ad43-4573-9bda-697d8a01a74a'/{da82a132d}

Redigér Person

Fornavn	<input type="text" value="Peter"/>	Ansv.	<input type="text" value="Demo Demosen"/>	Telefon direkte	<input type="text" value="+45 65657876"/>
Efternavn	<input type="text" value="Jensen (demo)"/>	Køn	<input type="text"/>	Telefon mobil	<input type="text" value="+45 88998877"/>
Kaldenavn	<input type="text"/>	CPR	<input type="text"/>	Telefon privat	<input type="text"/>
Titel	<input type="text" value="CEO"/>	Gade1	<input type="text"/>	E-mail-adresse1	<input type="text"/>
Titulering	<input type="text"/>	Gade2	<input type="text"/>	E-mail-adresse2	<input type="text"/>
Firma	<input type="text" value="Blokhuset (demo)"/>	Gade3	<input type="text"/>	E-mail personlig	<input type="text"/>
Jobfunktion	<input type="text" value="Søg"/>	Postnummer	<input type="text"/>	Skype Id	<input type="text"/>
Personrolle	<input type="text" value="Søg"/>	By	<input type="text"/>		
Chef	<input type="text" value="Søg"/>	Stat	<input type="text"/>		
		Land	<input type="text" value="Søg"/>		

Noter

Ny aktivitet Opret Word Opret e-mail Upload Slet

Contact view

View Contact

https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/ViewContact/guid'2a460b83-ad43-4573-9bda-697d8a01a74a'/[abed3ead5]

Skyview CRM Person

Detaljer Infotags Salgsmuligheder Foto Kampagner Projekter Aktivitetsnoter

Fornavn	Peter	Ansv.	Demo Demosen	Telefon direkte	+45 65657876
Efternavn	Jensen (demo)	Køn		Telefon mobil	+45 88998877
Kaldenavn		CPR		Telefon privat	
Titel	CEO	Gade1		E-mail-adresse1	
Titulering		Gade2		E-mail-adresse2	
Firma	Blokhuset (demo)	Gade3		E-mail personlig	
Jobfunktion		By		Skype Id	
Chef		Postnummer			
		Stat			
		Land			

Noter

Start	Type	Emne	Salgsmulighed	Firma	Lokation	Projekt	Ejer	Afslu
9/22/2014 1:31:00 PM	Telefonkald	Test		Blokhuset (demo)			Demo Demosen	<input checked="" type="checkbox"/>

Redigér Ny aktivitet Opret Word Opret e-mail Upload Genlæs Tilbage

View Contact x

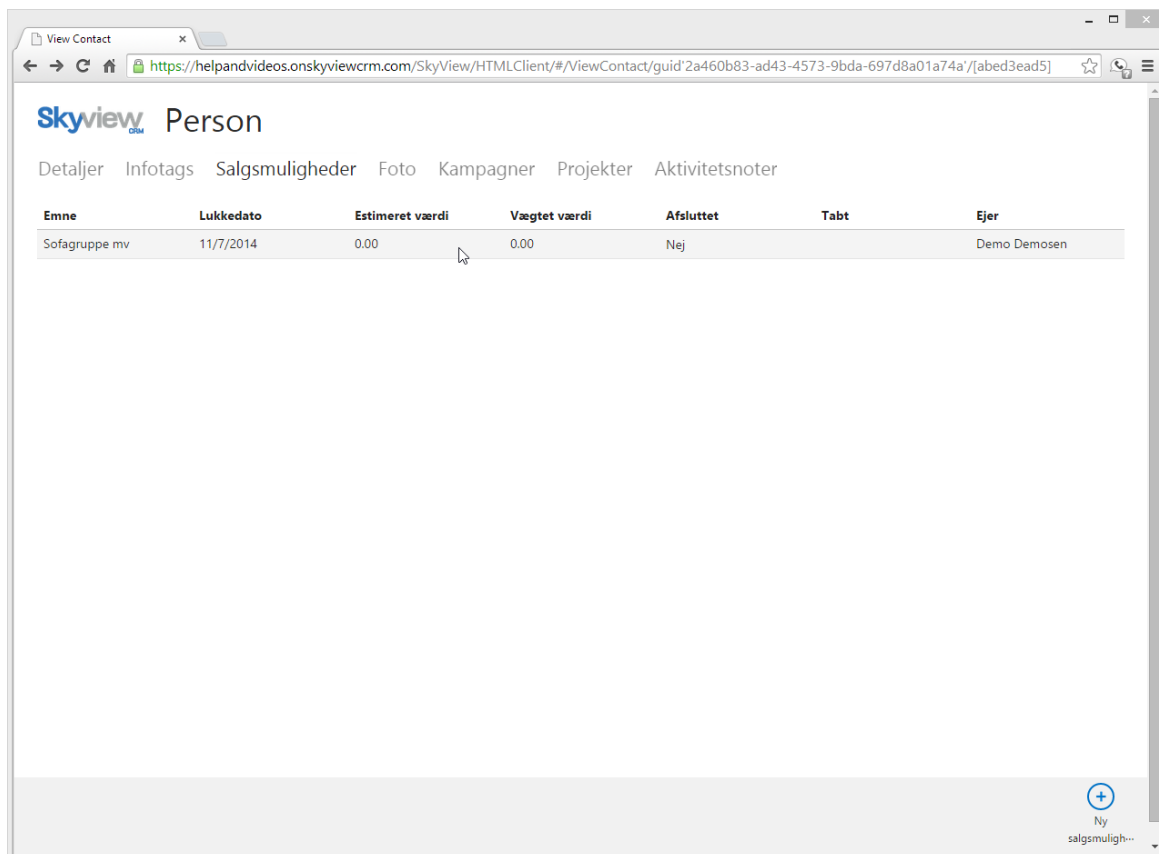
← → ↻ 🏠 [https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/ViewContact/guid'2a460b83-ad43-4573-9bda-697d8a01a74a'/\[abed3ead5\]](https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/ViewContact/guid'2a460b83-ad43-4573-9bda-697d8a01a74a'/[abed3ead5]) ☆ 🔍 ☰

Skyview Person

Detaljer Infotags Salgsmuligheder Foto Kampagner Projekter Aktivitetsnoter

Infotag	Værdi	Opdateret	Opdateret af
Jul.Kort (demo)		10/6/2014 9:58:17 AM	Demo Demosen

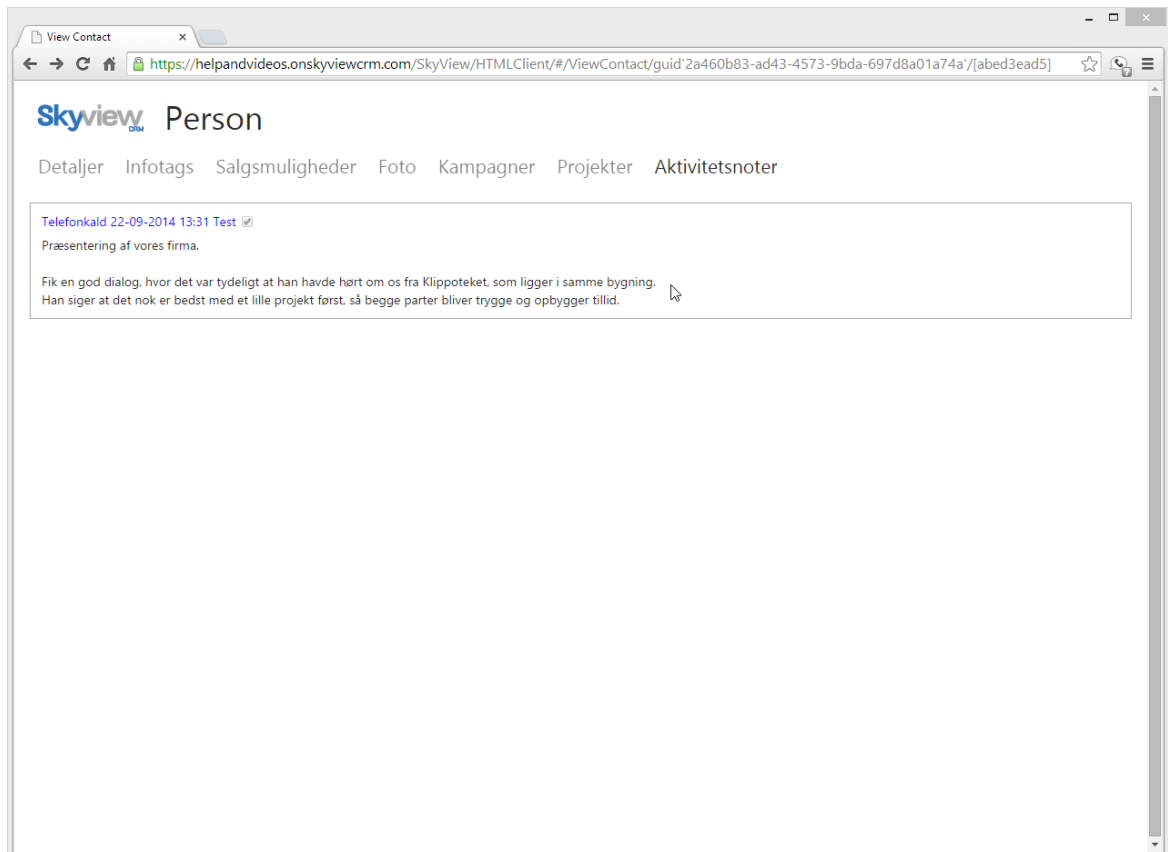
+ Tilføj Infotag



The screenshot displays a web browser window with the URL [https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/ViewContact/guid'2a460b83-ad43-4573-9bda-697d8a01a74a'/\[abed3ead5\]](https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/ViewContact/guid'2a460b83-ad43-4573-9bda-697d8a01a74a'/[abed3ead5]). The page title is "Skyview CRM Person". Below the title, there are navigation tabs: "Detaljer", "Infotags", "Salgsmuligheder", "Foto", "Kampagner", "Projekter", and "Aktivitetsnoter". A table with the following data is visible:

Emne	Lukkedato	Estimeret værdi	Vægtet værdi	Afsluttet	Tabt	Ejer
Sofagruppe mv	11/7/2014	0.00	0.00	Nej		Demo Demosen

In the bottom right corner, there is a button with a plus sign and the text "Ny salgsmuligh..." (New sales opportunity...).



View Contact x

← → ↻ 📄 [https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/ViewContact/guid'2a460b83-ad43-4573-9bda-697d8a01a74a'/\[abed3ead5\]](https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/ViewContact/guid'2a460b83-ad43-4573-9bda-697d8a01a74a'/[abed3ead5]) ☆ 🔍 ☰

Skyview Person

Detaljer Infotags Salgsmuligheder Foto Kampagner Projekter **Aktivitetsnoter**

Telefonkald 22-09-2014 13:31 Test ✓

Præsentering af vores firma.

Fik en god dialog, hvor det var tydeligt at han havde hørt om os fra Klippoteket, som ligger i samme bygning. Han siger at det nok er bedst med et lille projekt først, så begge parter bliver trygge og opbygger tillid.

Activities

Part

10

10 Activities

Phone call

E-mail

Letter

Meeting

Internal Note

Internal Document

Mail Merge

Part




11

11 Mail Merge

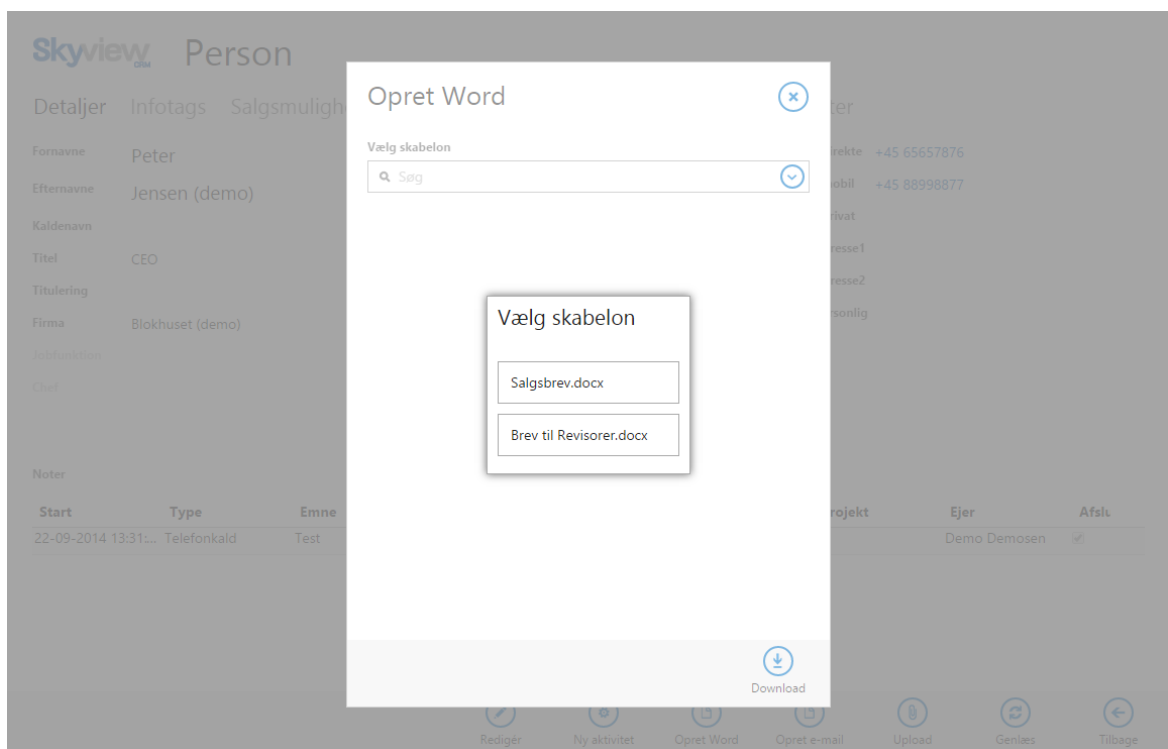
- Mail Merge to Microsoft Word
- Mail Merge to Outlook
- Mail Merge Fields

Mail Merge to Word

SkyViewCRM is capable of merging data into Word document based on your templates. All the work is done by the cloud servers - all you have to do is open the resulting word document.

The merge can be initiated from all screens having a button  labeled Word. The data fields ready for merging depends on the context from where you are using the function. More data in the context enables merging more data into word. Often an activity is the best place to initiate a mail merge from. This is so because the activity (asides from activity data like start and location) also links to company data, to contact person data as well as possibly project and opportunity/quote.

Click the Word button and a dialog for choosing the template shows:



Choose the template and click the Download button:

tempfile (1).docx (Kompatibilitetstilstand) - Word

FILER HJEM INDSÆT DESIGN SIDELAYOUT REFERENCER FORSENDELSER GENNEMSE VIS Jens TEST

Calibri (Brødtekst) 11

F K U abc X₂ X² Aa A A Typografier Redigering

Udklipsholder Skrifttype Afsnit Typografier

Skyview CRM

CEO Peter Jensen (demo)
 Blokhuset (demo)
 Københavnsvej 23
 3460 Birkerød

Birkerød, den 10. oktober 2014

Kære Peter Jensen (demo) ,

Skab en vind-vind situation mellem SkyViewCRM og e-economic!

Har din revisor automatisk adgang til dine tal, så det er nemt at afslutte årsregnskabet?

Økonomisystemet ser bagud! ☹ CRM-systemet ser fremad! ☺

For at der overhovedet skal være omsætningstal i økonomisystemet, er det vigtigt, der er styr på, hvad marketing- og salg arbejder med. Det glemmes tit, fordi Skat puster én i nakken, så man altid opgraderer og betaler og betaler for at shine økonomisystemet op, medens man tit glemmer, at den eneste grund til, man overhovedet har et økonomisystem er, at en sælger har gennemført et salg.

I mange virksomheder får sælgerne ikke lov til at arbejde med et system, der passer til DERES hverdag, og kan lette DERES liv.

Jo bedre styr, der er på kunderne – og de potentielle kunder, f.eks.: Hvor ofte skal hver enkelt kunde og potentielle kunde kontaktes om hvad?

- Hvornår skal en salgsmulighed lægges ind?
 - Hvordan skal vurderes hvilken sandsynlighed, der er for at lukke en ordre - skal man f.eks. have fat i "manden med den gyldne pen" for at der overhovedet kan være tale om 90% sandsynlighed?
 - Hvor stor kan denne ordre blive

SIDE 1 AF 7 664 ORD ENGELSK (USA) 100 %

Thats it! The document is ready with all relevant data filled in already.

For instructions on how to create the templates look [here](#).

Mail Mege to Outlook

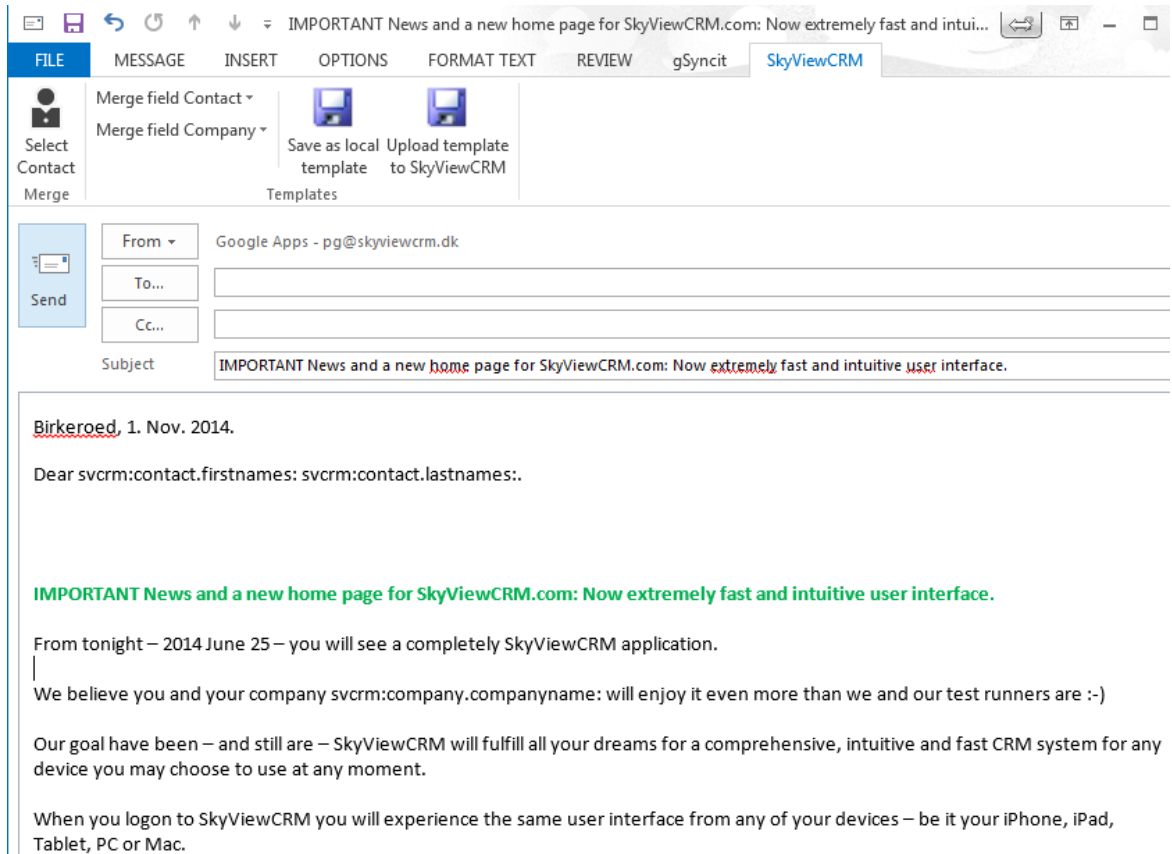
Create e-mail template

Choose to create a new e-mail. Create your mail with pictures and text and insert fields from your

SkyViewCRM data base to personalize the mail. You can ie. Insert the contact persons First and Last name or any of the other shown fields from the "Merge Fields" drop down boxes.

The screenshot shows an email client window with a mail merge dropdown menu open. The menu lists various fields for merging into the email body. The email body contains a message about SkyViewCRM, including a subject line, a salutation, and several paragraphs of text. The dropdown menu is currently open, showing a list of fields such as CompanyName, Address1Department, Address1Street1, Address1Street2, Address1Street3, Address1Zip, Address1City, Address1State, Address1Country, Address2Department, Address2Street1, Address2Street2, Address2Street3, Address2Zip, Address2City, Address2State, Address2Country, Phone, Fax, Mail, VAT, WEB, EAN, BankAccount, CustomerKey, and DebtorGroup. The email body text includes: "IMPORTANT News and a new home page for SkyViewCRM.com: Now extremely fast and intuitive use", "Dear sv", "Birkerc", "From t", "We bel", "Our go device", "When v Tablet,", "any screen will show in less than a second", "is on one single screen", "y not need to read the HELP manual at all", and "Examples from the new screen design:". The email client interface includes a menu bar with options like FILE, MESSAGE, INSERT, OPTIONS, FORMAT TEXT, REVIEW, gSyncit, and SkyViewCRM. There are also icons for "Select Contact Merge" and "Send".

Example where the first name, last name and Company name are used. When you have finished creating you mail, please remember to check and correct spelling errors. If there are words unfamiliar to the dictionary please add the “new” words as valid words by right clicking on the word and select add to dictionary. You are only able to save templates with “no errors” !






When finished and satisfied you can save the mail in two places – either locally in your own Outlook by choosing “Save as a local template” or in SkyViewCRM by choosing “Upload template to SkyViewCRM”.

If you save your template locally, only you are able to use it – while uploading the template to SkyViewCRM gives your colleagues the option to reuse the template you created.

To reuse a template – simply “download template”.

0 [Icons] [Dropdown]

FILE HOME SEND / RECEIVE FOLDER VIEW ADD-INS gSyncit SkyViewCRM

 Open Template Templates	 Download Template Templates	 Campaign Sendout Campaign	Upload contacts Add SkyView Fields Show/hide SkyViewCRM Various	Position
---	---	---	--	----------

▲ Favorites

- Inbox **1016**
- Sent Items **37**

< All Unread

! [Icons]	FROM	SUBJECT
▲	Date: Today	

Campaigns

Part

12

12 Campaigns

Enter topic text here.

E-mail Campaign

A very efficient way of communication with many contacts is by using a campaign in SkyViewCRM. There are several ways to add contacts to the target group of a campaign - here you will see one:

It's based on Info tags and we assume that you have added a suitable Info tag til all the contacts you want to take part of the campaign.

Now create the Campaign.

Edit Campaign



Details Script

<p>Subject</p> <input type="text" value="Test Campaign PG"/>	<p>Owner</p> <input type="text" value="Peter Grøndahl"/>			
<p>Is Running</p> <input type="checkbox"/> No	<p>Default Attention</p> <input type="text"/>			
<p>RollOut Date</p> <table border="1"> <tr> <td>Nov</td> <td>10 - Mon</td> <td>2014</td> </tr> </table>	Nov	10 - Mon	2014	<p>EMail Subject</p> <input type="text"/>
Nov	10 - Mon	2014		
<p>Complete Date</p> <table border="1"> <tr> <td>MM</td> <td>DD</td> <td>YYYY</td> </tr> </table>	MM	DD	YYYY	<p>Completed</p> <input type="checkbox"/> No
MM	DD	YYYY		
<p>Notes</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"> <p>Test campaign for help</p> </div>				

After saving the Campaign by hitting the disc in the upper right corner, choose the menu "add/remove contacts". By choosing the Info tag you will use for this campaign, you can list the population you want to participate in this campaign.

Kampagne

Detaljer Målgruppe Tildeling Script Tilføj/fjern firmaer Tilføj/fjern kontaktpersoner

Person titel Personfunktion InfoTag kontakt Kontaktpersonansvarlig

Postnummer starter med Firma Land Omsætning fra Omsætning til

Antal ansatte fra Antal ansatte til NACE

KAM Har e-mail

resultater af kriterier. Klik på de nederste knapper for at tilføje eller fjerne resultater fra kampagnens målgruppe.

Fornavn	Efternavn	Titel	Jobfunktion	Firma	E-mail	Telefon direkte	Telefon privat	Telefon mobil	Ansv.	KAM
Helle	Skatford		Byggefelt S						Søren Rask	Søren Rask
Palle	Langsom		Hurtige Biler...						Peter Grønd...	Peter Grønd...
Jacob	Johnson		Supercyklen...			22345695		20202167		
Flemming	Hellesø		Tapetbrikken			22345689		20202161		
Hanne	Jungshoved		Kærnehuset			22345649		20202121		Bente Flid
Åse	Petersen		Odense Halm						Søren Rask	Søren Rask
Edward	olsen		Nyhavn Rejser						Søren Rask	Søren Rask
Lars-Erik	Larsen		3E elfirma						Søren Rask	Søren Rask
Holger	Wolf		Madrasser A/S			22345694		20202166		
Joan	Fischer		Ny person						Søren Rask	
Joachim	Von And	rigmand	Sølv og Guld...			22345697		20202169		Peter Grønd...
Arthur	Skipper		Rugbrødsfab...							
Cecilia	Christoph		Radiocenter...			22345676		20202148		
Arnt	Smith		Syd-Vestfyns...			22345683		20202155		
Robin	Saager Jako...		Skamby EL A...						Søren Rask	Søren Rask
Yrsa	Pedersen		DEF						Søren Rask	Søren Rask
Torben	Hansen		Tømmerfirm...						Søren Rask	Søren Rask
Kirk	Douglas		Kapitalforval...			22345657		20202129		
Bent	Boldtsen (de...	CEO	Østasiatisk Ø...			+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Hans	Hansen		Art Gallery						Peter Grønd...	Peter Grønd...
Eva	Clausen		Chokoladefa...			22345648		20202120		Søren Rask
Birger	Grøn		Cykelkompa...			22345654		20202126		Bente Flid
Zenia	Petrusen		Zebra Grafik						Demo Demo...	Demo Demo...

Personer Personer

You add these people by pressing the “+ contacts” at the bottom right corner.

Kampagne

Detaljer Målgruppe Tildeling Script Tilføj/fjern firmaer Tilføj/fjern kontaktpersoner

Person titel Personfunktion InfoTag kontakt Kontaktpersonansvarlig

Postnummer starter med Firma Land Omsætning fra Omsætning til

Antal ansatte fra Antal ansatte til Firmrelation NACE

KAM InfoTag firma Har e-mail

7 resultater af kriterier. Klik på de nederste knapper for at tilføje eller fjerne resultater fra kampagnens målgruppe.

Fornavn	Efternavn	Titel	Jobfunktion	Firma	E-mail-adresse1	E-mail-adresse2	E-mail personlig	Telefon direkte	Telefon privat	Telefon mobil	Ansv.	KAM
Bent	Boldtsen (de...	CEO		Østasiatisk Ø...				+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Peter	Jensen (demo)	CEO		Blokhuset (d...				+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Susanne	Mogensen (...)	Salgsdirektør		Blokhuset (d...				+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Charlotte	Boilesen (de...	CEO		Trykkeriet A/...				+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Gitte	Elling (demo)	Area Sales		Blokhuset (d...				+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Jørgen	Eiler (demo)	Business Ma...		Måneskinsh...				+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Anne	Jørgensen (d...	Konsulent		Jermmanden...				+45 65657876		+45 88998877	Demo Demo...	Demo Demo...

Personer Personer

You will have to confirm the addition to the campaign by hitting “ok”.

Kampagne [H] [X]

Detaljer Målgruppe Tildeling Script Tilføj/fjern firmaer Tilføj/fjern kontaktpersoner

Person titel Personfunktion InfoTag kontakt Flyttereceptor Kontaktpersonansvarlig

Postnummer starter med Firma Land Omsætning fra Omsætning til

Antal ansatte fra Antal ansatte til Firmarelation NACE

KAM Har e-mail

Bekræft venligst

Bekræft tilføjelse af 7 kontakter til kampagnen

OK

Annuller

7 resultater af kriterier. Klik på de nederste knapper for at tilføje personer fra kampagnens målgruppe.

Fornavne	Efternavne	Titel	Jobfunktion	Firma	Telefon direkte	Telefon privat	Telefon mobil	Ansv.	KAM
Bent	Boldtsen (de...	CEO		Østasiatisk Ø...	+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Peter	Jensen (demo)	CEO		Blokhuset (d...	+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Susanne	Mogensen (...)	Salgsdirektør		Blokhuset (d...	+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Charlotte	Boilesen (de...	CEO		Trykkeriet A/...	+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Gitte	Elling (demo)	Area Sales		Blokhuset (d...	+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Jørgen	Eiler (demo)	Business Ma...		Måneskinsh...	+45 65657876		+45 88998877	Demo Demo...	Demo Demo...
Anne	Jørgensen (d...	Konsulent		Jernmanden...	+45 65657876		+45 88998877	Demo Demo...	Demo Demo...

+ Personer - Personer

By choosing “Target” you can now see all persons belonging to your campaign.

Kampagne [H] [X]

Detaljer Målgruppe Tildeling Script Tilføj/fjern firmaer Tilføj/fjern kontaktpersoner

Målgruppe

Firma	Person	Attention (standard)	Rørt	Første kald	Kommentarer	Acceptårsag	Afvisningsgrur	Handlingsansv	Seneste handling	Næste kald	Afsluttet
Østasiatisk ØL...	Bent Boldtsen...										Nej
Blokhuset (de...	Susanne Mog...										Nej
Jernmanden L...	Anne Jørgens...										Nej
Blokhuset (de...	Peter Jensen (...)										Nej
Blokhuset (de...	Gitte Elling (d...										Nej
Måneskinshus...	Jørgen Eiler (d...										Nej
Trykkeriet A/S...	Charlotte Boil...										Nej

Excel Flet med Word Slet Genlæs Gem

If you have more people with different Info tags you want to add to your campaign, you can do that by adding each info tag group of people after each other. One contact/person will only participate one time in the campaign, even if the contact are having more of the used info tags attached.

Tele Campaign

Enter topic text here.

Setup

Part

13

13 Setup

Mail Merge Templates

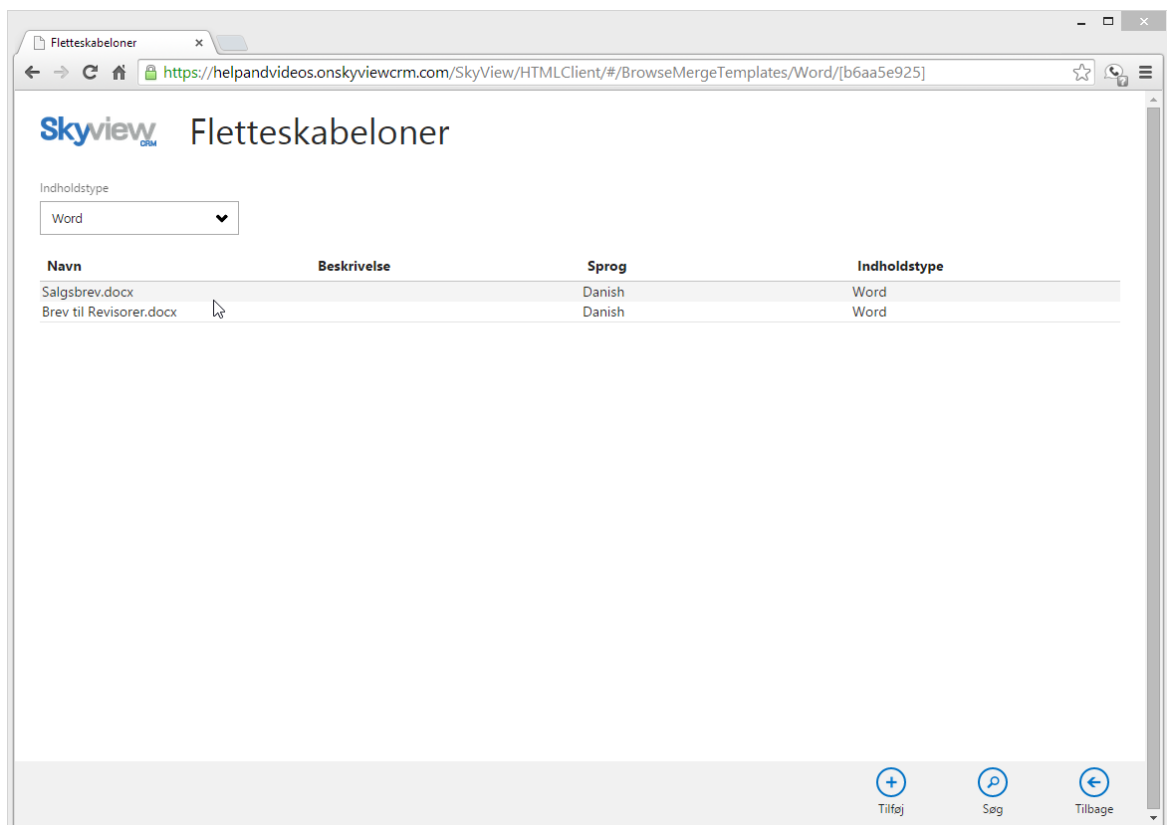
Mail Merge Templates are special documents - either in Word format or in Outlook msg-format - containing text strings corresponding to the [Merge Field names](#) in SkyViewCRM.

If you are using the SkyViewCRM Office AddIn you will access the ribbon within Word or Outlook to allow for inserting these fields.

If you are to create a template manually, you can copy/paste the field names from [here](#).

Having the Merge Fields inserted into your document (Word or Outlook), the template has to be uploaded to SkyViewCRM. Again, if you are using the Office AddIn this can be done by the SkyViewCRM ribbon withing Word or Outlook. Otherwise you will use the functionality within SkyViewCRM itself.

In the main menu choose: More... | Setup | Merge templates.



Now you will be able to edit existing templates or you can create and upload new ones. Select the type of template top left (Word here) and click the Add button.

The screenshot shows a web browser window with the URL [https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/AddEditMergeTemplate/null/\[b246f8fd8\]](https://helpandvideos.onskyviewcrm.com/SkyView/HTMLClient/#/AddEditMergeTemplate/null/[b246f8fd8]). The page title is 'Fletteskabelon'. The form contains the following elements:

- Navn:** A text input field.
- Beskrivelse:** A text input field.
- Sprog:** A dropdown menu currently showing 'Danish'.
- Standardemnetekst:** A text input field.
- Dokument type:** 'Word dokument'.
- Indholdstype:** 'Word'.
- Upload:** A button labeled 'Vælg fil' and a message 'Der er ikke valgt nogen fil'.
- Filstørrelse:** A greyed-out button labeled 'Upload og gem'.

At the bottom right of the page, there are two icons: 'Download fletteskabel--' and 'Slet'.

Now select the merge template file. Having done so you can name the template and lastly click "Upload and save".

If you are uploading an Outlook based template you will have to save this template as a file beforehand. In Outlook - and within the mail template in question - select "Save as..." and choose "msg - unicode".

Important:

Regardless of file type (Word or Outlook) you will have to make sure that the template content is not marked by the Office spell or grammar control (as seen by colored zig-zag lines). To clear this you can use the context menu "Add to dictionary" or "Ignore here".

If you upload and use Merge Templates containing spell or grammar markings, the fields in question will not be merged.

Mail Merge Fields

For reference this is a complete list of Mail Merge Fields to add to Word or Outlook templates.

Company	Contact	Current User
0companycompanyname0	0contactfirstnames0	0userfirstnames0
0	0contactlastnames0	0userlastnames0

0companyaddress1department0 0companyaddress1street10 0companyaddress1street20 0companyaddress1street30 0companyaddress1zip0 0companyaddress1city0 0companyaddress1city0 0companyaddress1state0 0companyaddress1country0 0companyaddress2department0 0companyaddress2street10 0companyaddress2street20 0companyaddress2street30 0companyaddress2zip0 0companyaddress2city0 0companyaddress2state0 0companyaddress2country0 0companyphone0 0companyfax0 0companymail0 0companyvat0 0companyweb0 0companyean0 0companybankaccount0 0companycustomerkey0 0companydebtorgroup0 0companyaux10 0companyaux20 0companyaux30 0companyaux40 0companyaux50	0contactfriendlyname0 0contacttitle0 0contactsalutation0 0contactphonedirect0 0contactphonemobile0 0contactphonehome0 0contactemailaddress10 0contactemailaddress20 0contactemailaddresspersonal0 0contactbusinessaddressstate0 0contactbusinessaddressstreet10 0contactbusinessaddressstreet20 0contactbusinessaddressstreet30 0contactbusinessaddresszip0 0contactbusinessaddresscity0 0contactcontactfunction0 0contactean0 0contactssn0 0contactspouse0 0contactaux10 0contactaux20 0contactaux30 0contactaux40 0contactaux50	0userfriendlyname0 0userjobtitle0 0useremailaddress10 0useremailaddress20 0userphonemobile0 0userphonedirect0 0userfaxdirect0 0userunitname0 0userstreet10 0userstreet20 0userstreet30 0userzip0 0usercity0 0userstate0 0userservat0
Activity	Quote	Quote Line (inserts in a table row)
0activitysubject0 0activitydescription0 0activitystart0 0activityfinish0 0activitylocation0	0quotesubject0 0quotebodytext0 0quotevalidfrom0 0quotevalidto0 0quotepricesum0	0quotelineidentifier0 0quotelinedescription0 0quotelinelongdescription0 0 0quotelineprice0

0activityaux10	0quotepricenetsum0	0quotelinequantity0
0activityaux20	0quotetaxsum0	0quotelinediscount0
0activityaux30	0quotediscountsum0	0quotelinediscountasper cent0
0activityaux40		0quotelinepricenet0
0activityaux50		0quotelinetax0
		0quotelineunitprice0
		0quotelineunitpriceorigin0
		0quotelinecurrency0

Info Tags

Pick lists for Info Tags is opened by Home page | More ... | Setup | Info Tags

SkyviewSM Infotag plukkelister

Aktiviteter Firmaer Personer Projekter Salgsmuligheder Kontrakter Kampagner

Tekst

Er aktiv

Ingen elementer



Tilføj Infotag



Tilbage

Start by selection the entity on which you are to add or edit Info Tags. Here we have selected Contact Persons:

Skyview CRM Infotag plukkelister

Aktiviteter Firmaer Personer Projekter Salgsmuligheder Kontrakter Kampagner

Tekst	Er aktiv
Fundet via Andet	Ja
Exchange oprettet	Ja
Nyhedsbrev frameldt	Ja
Kunde	Ja
Nyhedsbrev	Ja
BestillingBruger	Ja
Tidligere kunde	Ja
Fundet via Ven/kollega	Ja
Fundet via SkyViewCRM kunde	Ja
Fundet via Google	Ja
Telefondemo afholdt	Ja
Economic oprettet	Ja
BestillingAdministrator	Ja
Fundet via LinkedIn	Ja
Fundet via FaceBook	Ja
TESTER	Ja



Tilføj Infotag



Gem

Click "Add Info Tag":



Enter a suitable name for the Info Tag and click Save.

If you mark the Info Tag as Inactive, the Info Tag cannot be applied to Contact Persons anymore.

E-economic

If you have obtained the SkyViewCRM option "E-economic integration" you start by setting up the integration to best suit your needs.

The settings are found by menu **Start menu | More ... | Setup | E-economic settings**

The screenshot shows a web browser window with the URL <https://nsd.onskyviewcrm.com/SkyV>. The page is titled "E-economic Settings" and has a "Lookup Values" tab. The settings are as follows:

- Enabled:** Yes
- Enter Token:**
- Get Token:**
- Synchronize Debtors:** Yes
- Debtor Groups For Sync:**
- Allow Create Debtor:** No
- Auto Create Debtor Number:** Yes
- Default Debtor Group:**
- Edit Debtor From CRM:** Yes
- Synchronize Products:** No
- Products Default Availability:** Yes
- Allow Create Order:** No
- Order Create Level:**
- Synchronise Invoices:** Yes
- Only with CRMOrigin:** No

All fields are to be used:

- Enabled** Set to Yes if the integration is active (This alone will not do it. You also have to add the E-economic option to your SkyViewCRM license.)
- Enter token** Here you will paste in the text string (token), given to you from e-economic. (To get this token you can press the designated button "Get token" and follow directions). This field will show up empty when you save the screen once you save the settings as the token is stored encrypted and cannot be made visible again.
- Synchronize debtors** Whether debtors in e-economic should create/update companies in SkyViewCRM. The key field is Customer Key. Base data - as well as financial stats - are transferred from e-economic to SkyViewCRM on a daily basis.
- Debtor Groups For Sync** Leave empty or enter a comma separated list of debtor group numbers. Only debtors belonging to groups listed here will be synchronized with SkyViewCRM. If you leave the field empty debtors of all groups will be synchronized. To find out the assigned numbers in your e-economic installation you can open e-economic and check. Or you can click the tab named Lookup Values. (This latter option requires that your token is entered and saved as it involves CRM connecting to your e-economic)
- Allow Create Debtor** Whether a company in SkyViewCRM - without a corresponding debtor in e-economic - should be able to trigger the creation of a new debtor in e-economic. This is a prerequisite for being able to take in orders on customers not yet known to e-economic.
- Auto Create** Recommended value = Yes. E-economic is capable of assigning new debtors the

Debtor Number	next available number and as such ensure that each debtor gets a unique debtor number. If you set this field to No, you will yourself have to ensure that you enter suitable debtor numbers everytime you create a new debtor from SkyViewCRM.
Default Debtor Group	Enter the number of the e-conomic debtor group that you want to assign to debtors created from SkyViewCRM by default.
Edit Debtor From CRM	Whether a user of SkyViewCRM should be allowed to edit a debtor in e-conomic via the SkyViewCRM user interface.
Synchronize products	Whether the product catalog in e-conomic should synchronize with the product catalog in SkyViewCRM. This is a prerequisite for order intake in SkyViewCRM as else we would not know the price etc.
Products Default Availability	When new products are imported to SkyViewCRM as part of the synchronization this field value will determine whether the product will be selectable when configuring a Sales Opportunity. (As part of the Product List Setup in SkyViewCRM you can change this later on for each product)
Allow Create Order	Whether order intake in SkyViewCRM should be allowed.
Order Create Level	Select the item type to create in e-conomic as a result of an order intake in SkyViewCRM: <ul style="list-style-type: none"> • Quote • Order • Invoice (not booked) • Booked invoice <p>These possibilities will in ascending order require that all data is correct and verified before the order is taken. As an example "Booked invoice" will require that a debtor with e-mail address and all invoice line products are filled in. Otherwise the invoice cannot be processed and mailed by e-conomic.</p> <p>If you are uncertain of this, please select a lower level of integration (could be "Order") and do the actual booking in e-conomic when data is verified.</p>
Synchronize Invoices	Whether invoices (headers and lines) are to be transferred to SkyViewCRM.
Only With CRM Origin	Set to Yes if only orders/quotes/invoices that origins from Quotes created in SkyViewCRM should be imported to SkyViewCRM as part of the synchronization process.

Import

Part

14

14 Import

Enter topic text here.

SkyViewCRM and Microsoft Office

Part

15

15 SkyViewCRM and Microsoft Office

Use SkyViewCRM within the Microsoft Office environment. (Outlook, Excel, Word and Exchange)

SkyViewCRM – your data is ready to use. From any place.



Whether you use own or hosted MS Exchange Server, SkyViewCRM can automatically:

- archive received and send mails and relate them to the right companies and persons
- synchronise appointments
- synchronise "ToDo's"
- synchronise contacts

Within Outlook you can:

- have a dedicated SkyViewCRM window
- search for and use email addresses from SkyViewCRM
- create standard email templates with merge fields
- manually track and archive emails in the right places (company and contact wise)

Within Word you can:

- create word templates with merge fields
- save a word document in the right place for archiving (person/company)



As a SkyViewCRM user you can access your data from any of your devices: PC, Mac, iPad, iPhone, Android tablet, Android phone, Windows phone and Blackberry – You will never again miss important information.

From your device you can perform any CRM task you like

- create or update company and contact info,
- create or update activities, projects, proposals, info tags and ...

As employee you have always a quick overview of your tasks (ToDo's), projects, possibilities and proposals. You have easy access to your results compared to budget including pipeline overview.

Within Excel you can:

- import data into SkyViewCRM – use it for transit from another CRM system or your manual system
- create your own reports, graphs, pivot tables based on the predefined ones – ie. get an overview of your pipeline versus budget or get a graph showing the efforts done by visualizing number of meetings, number of phone calls and number of proposals



As the manager you will have the overview of the pipeline versus budget/actual and the linked effort done – from your relevant perspective: company, department and person wise. You can easily follow and track who do archive which results based on which effort.

To benefit the most of your new CRM from SkyViewCRM, you better get the integration between your SkyViewCRM and Microsoft Office – Outlook, Excel and Word – up running.

You need to use one of the newest releases – either Microsoft Office 2010 or Microsoft Office 2013.

From within Outlook you can:

- Create email templates and seek contact information in real time with your SkyViewCRM system for merging into your mails.
- Decide to "track" an email – meaning SkyViewCRM will archive the email in the right place with reference to the sender.
- Open a window and have the entire SkyViewCRM system embedded.

From within Word you can:

- Write letters – templates and reuse templates with real time merge information from SkyViewCRM – ie. company name, address, contact name, proposals with articles and a lot

more.

Excel can be used for:

- Import data into SkyViewCRM – use it for transit from another CRM system or your manual system J
- Create your own reports, graphs, pivot tables based on the predefined ones – ie. get an overview of your pipeline versus budget or get a graph showing the efforts done by visualizing number of meetings, number of phone calls and number of proposals

Installation af Office AddIn

Først skal du hente SkyViewCRM "Add-in" til Microsoft Office

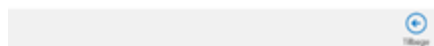
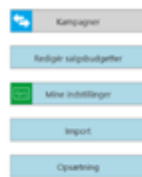
Inden du henter Add-inen skal du lukke OutLook, Excel og Word – ellers kan vi ikke installere din SkyViewCRM "Add-in".

For at hente SkyViewCRM "Add-in" skal du først:



Trykke på knappen "Mere"

Skyviewx Hjem mere...



Derpå skal du vælge "Mine indstillinger"

Mine indstillinger



Basisinformation Exchange

Fornavn
Peter

Efternavn
Grøndahl

Kølnavn
Peter

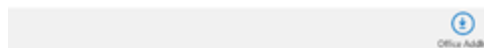
Jobtitel
Partner

E-mail adresse1
pg@skyviewcrm.com

E-mail adresse2
peter@grondahl.com

Telefon mobil
40134513

Telefon privat

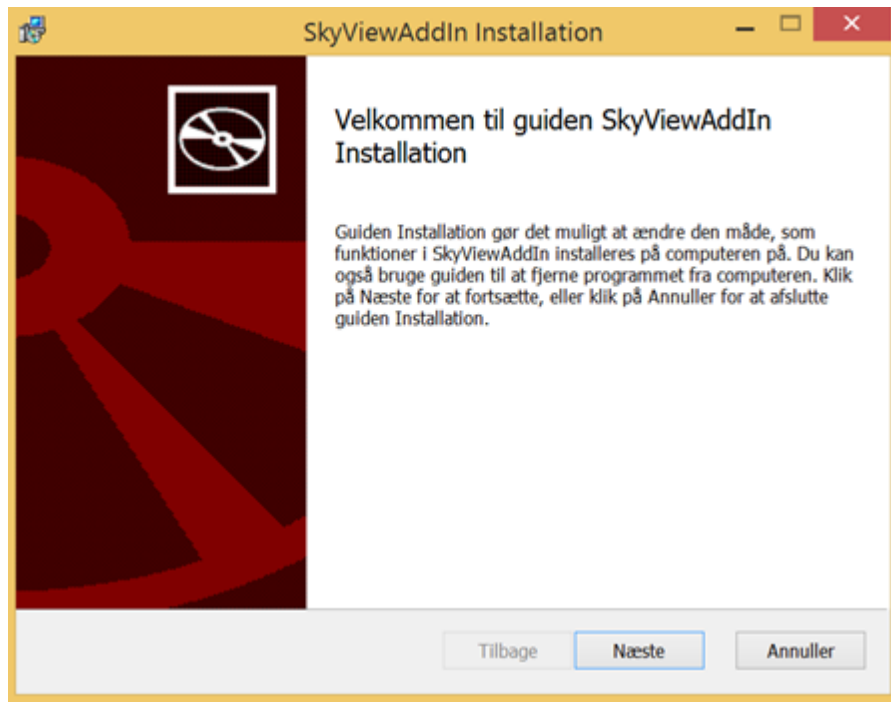


Under "Mine indstillinger" med basisinformationen fremme trykker du på ikonet i nederste højre hjørne – "Office AddIn".

Du får nu hentet SkyViewCRM "Add-in" som du så skal "køre".



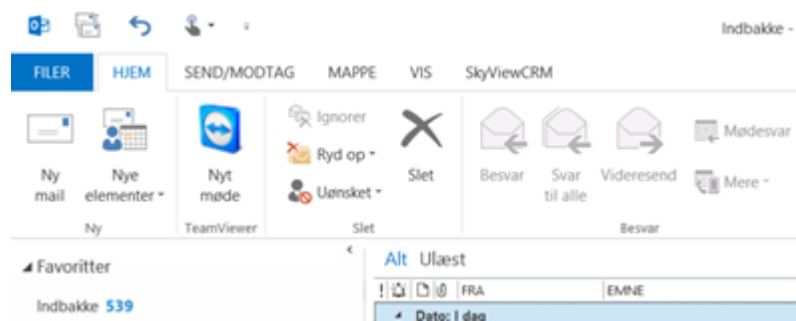
Herefter følger du blot vejledningen:



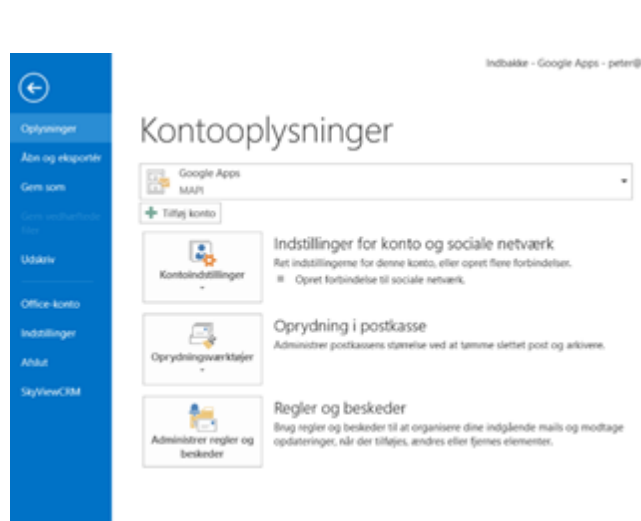
Opsætning af Office AddIn

Forbind SkyViewCRM med Microsoft Office Add-in – Word, Excel, Outlook.

Først skal du fortælle Outlook, hvilken SkyViewCRM du anvender, og det gør du ved at vælge fanen "FILER" i din Outlook

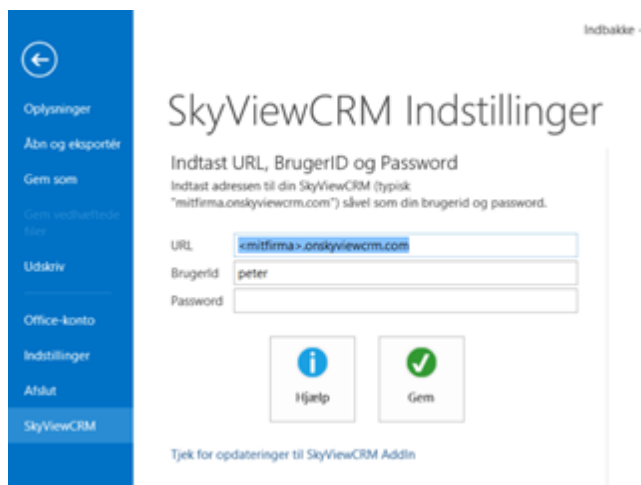


Dernæst vælger du fanen "SkyViewCRM"



Du indtaster nu dit firmas SkyViewCRM navn i feltet "URL" – eks. "ditfirma.onskyviewcrm.com". Efterfølgende indtaster du dit brugernavn og kodeord/Password, som du bruger til at logge på SkyViewCRM.

Tryk på "SAVE" og du har forbundet SkyViewCRM "Add-in" i din Outlook med din SkyViewCRM konto.



Du behøver ikke at checke for SkyViewCRM opdateringer – det vil ske automatisk, hver gang du starter Outlook.

SkyView med Exchange

Forbind SkyViewCRM med din Microsoft Exchange konto.

Hvis din mailserver er en Microsoft Exchange Server kan du forbinde SkyViewCRM med din Microsoft Exchange Server.

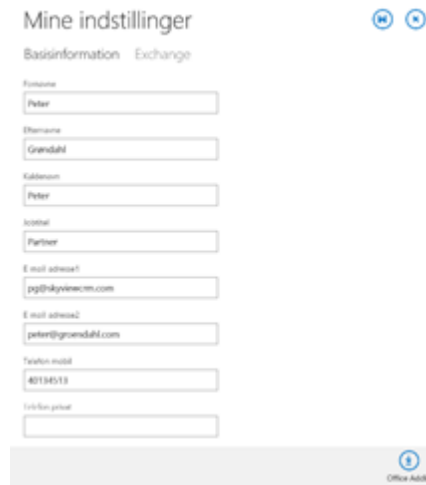
Du skal anvende en MS Exchange Server, der har et åbent interface (spørg din IT mand eller prøv) – enten det er Microsofts Office 365, dit firmas egen server installation eller en installation du har ude i byen (hosted Exchange), men som stadig er jeres egen.



Du finder muligheden for at fortælle SkyViewCRM om Jeres Exchange Server på følgende måde: Tryk på knappen "Mere" i hovedmenuen



Tryk på "Mine indstillinger"



Herefter når du basisinformationen og nu vælger du "Exchange"



1. Indtast din e-mail adresse i feltet "Exchange-konto (bruger-id)" og indtast dit dertilhørende password/kodeord i feltet "Indtast Exchange-konto password"
2. Afkryds/tryk på "JA" ud for "Brug Exchange" samt de øvrige felter du ønsker skal træde i funktion – "Synkroniser e-mails" etc.
3. Synkroniser e-mails betyder: dine ind- og udgående mails bliver automatisk (ca. hvert 15. minut) arkiveret under de personer hvis e-mail fremgår af felterne "til" og "CC".
4. Synkroniser Kalender betyder: dine aftaler vises og udveksles mellem SkyViewCRM og din Outlook/Exchange kalender.
5. Gem tilknyttede filer betyder at vedhæftede filer gemmes separat under de personer e-mailen er

sendt til i SkyViewCRM.

6. Vis aftale-tekst i CRM betyder at man ikke blot kan se at du har en aftale men også at man se teksten i aftalen.
7. Gem e-mail som dokument betyder at din mail gemmes i standard mail-format så du altid kan åbne mailen igen.
8. Tryk "Gem" ved at trykke på disketten øverst til højre. SkyViewCRM udfylder "Exchange Url" samt fjerner dit kodeord fra visningen.
9. Du kan teste sammenkoblingen ved at trykke på "Test". Er sammenkoblingen i orden får du en bekræftende e-mail. Er der problemer får du en e-mail, der gør opmærksom på problemet.

SkyViewCRM i Word

Hvordan bruger du SkyViewCRM inde fra Word

I fanen SkyViewCRM finder du 3 grupper:

Filer: tryk på disketten hvis du har startet Word inde fra SkyViewCRM og ønsker at gemme word-dokumentet under den aktivitet du var i gang med eller det dokument du var i gang med.

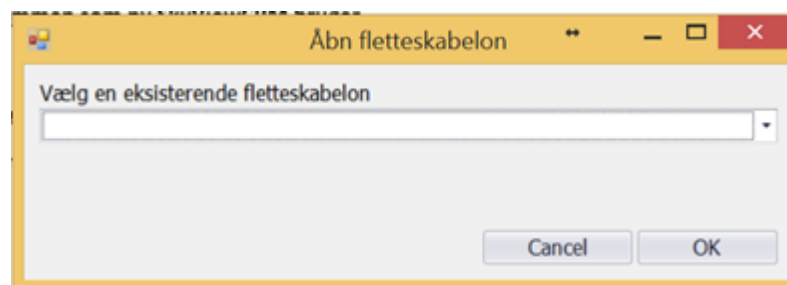
Hvis du ønsker at skabe et dokument, som du kan genbruge og hvori du gerne vil have Word til at hente information fra SkyViewCRM kan du indsætte flette felter og gemme det som en ny skabelon eller du kan fremfinde en eksisterende skabelon, som du kan rette i eller benytte som udgangspunkt for at danne et nyt flette dokument.

Indsæt flettefelter: i denne gruppering finder du de felter Word kan hente fra SkyViewCRMrrr

Fletteskabelon: tryk her for at gemme en ny flette skabelon eller hente en gammel.



Hvis du henter en gammel skabelon kan du vælge fra følgende menu:



Når du enten har valgt en gammel skabelon som udgangspunkt for en ny eller du vil skabe en ny kunne resultatet se således ud:

SkyView CRM

svcrm:company.companyname:
svcrm:company.address1department:
svcrm:company.address1street1:
svcrm:company.address1street2:
svcrm:company.address1street3:
svcrm:company.address1zip: svcrm:company.address1city:
svcrm:company.address1state:
svcrm:company.address1country:

Birkerød, den 1.10.2014

Vedr.: Velkommen som ny SkyViewCRM bruger

Kære svcrm:contact.firstnames: svcrm:contact.lastnames:

Vi vedlægger her en kortfattet introduktion til SkyViewCRM så du hurtigt kan begynde at bruge systemet.

Hjertelig velkommen ønskes du af

svcrm:user.firstnames:,
svcrm:user.jobtitle:

PS: Ring mig på svcrm:user.phonedirect: hvis du har brug for hjælp eller send mig en e-mail på svcrm:user.emailaddress1:

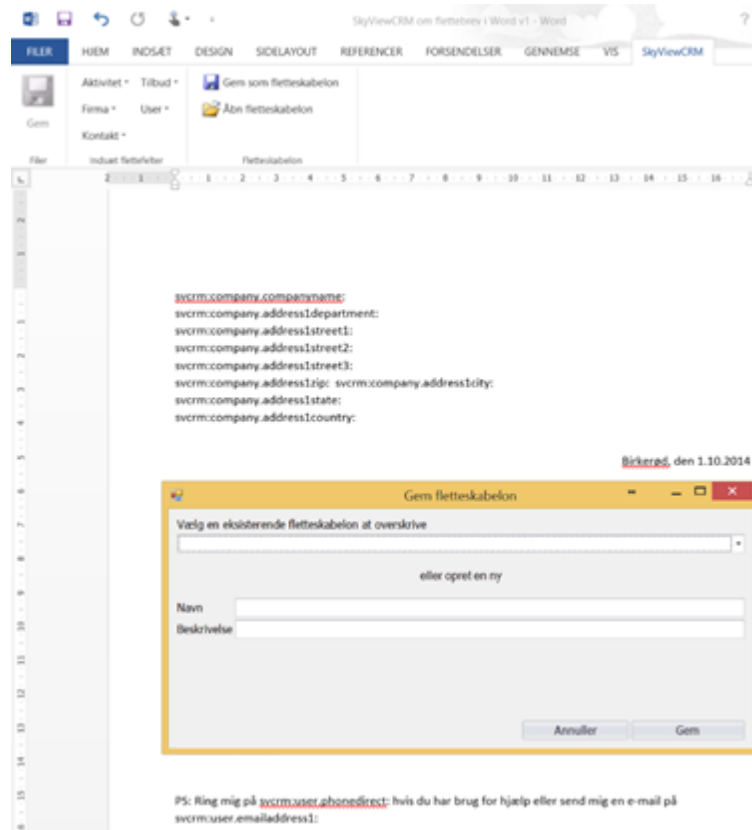
Blokken 17, 1.
3460 Birkerød

Mob. +45 4013 xxxx

pg@skyviewcrm.com
www.skyviewcrm.dk

SIDE 1 AF 1 62 ORD ENGELSK (USA) 100 %

Herefter kan du så gemme din skabelon ved tryk på "Gem som fletteskabelon" og så vælge om du vil overskrive en eksisterende eller skabe en ny fletteskabelon. Inden du gemmer skal du lige huske at højre klikke på alle "stavefej" og enten rette stavefejlen eller tryk på "føj til ordbog". Specielt skal du føje alle flettefelter til ordbogen.



Hvis du er startet fra SkyViewCRM med at have udvalgt en person du vil skrive et brev til trykker du på "Opret Word"

Skyview CRM Person

Detaljer Infotags Salgsmuligheder Foto Kampagner Projekter Aktivitetsnoter

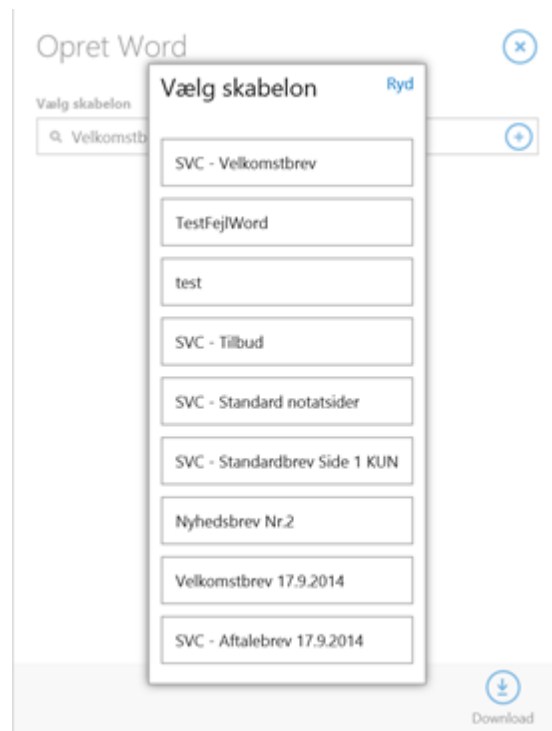
Fornavn	Anders	Ansv.	Peter Grøndahl	Telefon direkte	12345678
Efternavn	Fiskemand	Køn		Telefon mobil	09876543
Kaldenavn		CPR		Telefon privat	
Titel		Gade1		E-mail-adresse1	af@sild.dk
Titulering		Gade2		E-mail-adresse2	
Firma	Sildekompagniet Esbjerg	Gade3		E-mail personlig	
Jobfunktion		By		Skype Id	
Chef		Postnummer			
		Stat			
		Land			

Noter

Start	Type	Emne	Salgsmuligheder	Firma	Lokation	Projekt	Ejer	Afs
10-02-2014...	Telefonkald	Re: Diskuter...		Sildekompa...			Peter Grønd...	<input type="checkbox"/>
10-02-2014...	Møde	Enter Subject		Sildekompa...			Peter Grønd...	<input type="checkbox"/>
10-02-2014...	Telefonkald	Re: Diskuter...		Sildekompa...			Peter Grønd...	<input type="checkbox"/>
10-02-2014...	Møde	Diskutere sil...		Sildekompa...	Auktionshall...		Peter Grønd...	<input type="checkbox"/>
09-02-2014...	Møde	fiskemøde 2			hos Anders		Peter Grønd...	<input type="checkbox"/>
07-02-2014...	Telefonkald	Enter Subject		Sildekompa...			Peter Grønd...	<input type="checkbox"/>
20-01-2014...	Brev	Testbrev til f...		Sildekompa...			Peter Grønd...	<input type="checkbox"/>
20-01-2014...	Email	Hilsen fra L-C		Sildekompa...			Peter Grønd...	<input type="checkbox"/>
20-01-2014...	Brev	Invitation til...	Fforvaltning...	Sildekompa...			Peter Grønd...	<input type="checkbox"/>
20-01-2014...	Telefonkald	Ringte for o...	Fforvaltning...	Sildekompa...			Peter Grønd...	<input type="checkbox"/>

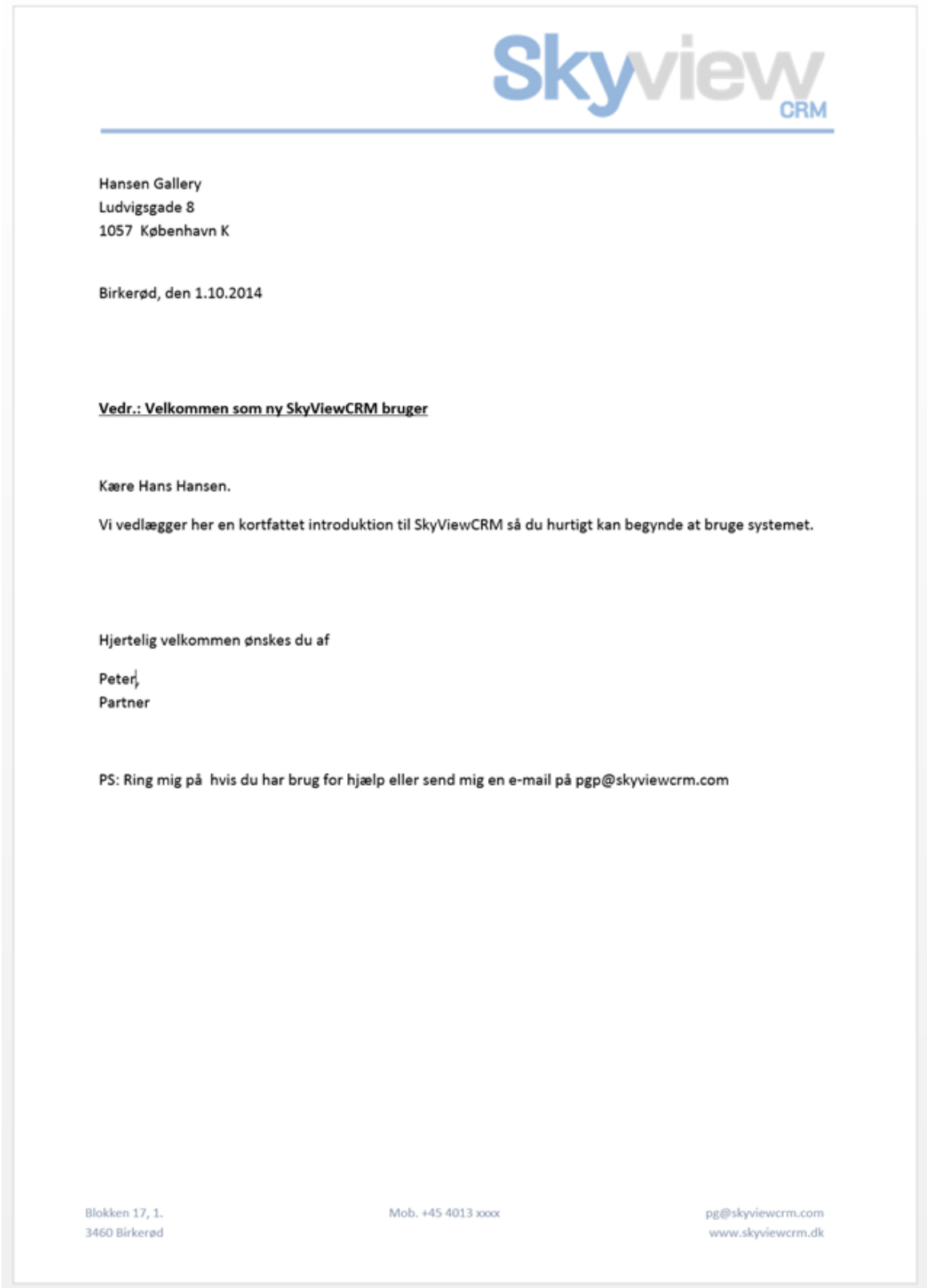


Så skal du vælge hvilken skabelon du vil bruge



Hvorefter du trykker på "Download" og så skal svare "Åbn" på sikkerhedsspørgsmålet

Hvorefter dit brev er klart til brug når du trykker på "Aktiver redigering"



Nu kan du udskrive brevet og du kan også uploade det til det firma eller den kontakt det er skabt fra.

Hvis brevet er skabt fra en aktivitet, kan AddIn'en gemme det blot ved at klikke på "Gem"-knappen i SkyViewCRM fanen.



Workflows

Part

16

16 Workflows

Send an e-mail campaign

How to send an e-mail to many people – and create and use a campaign for it.

Before sending an e-mail to many people, you must create a mail template and select a campaign, containing the chosen people.

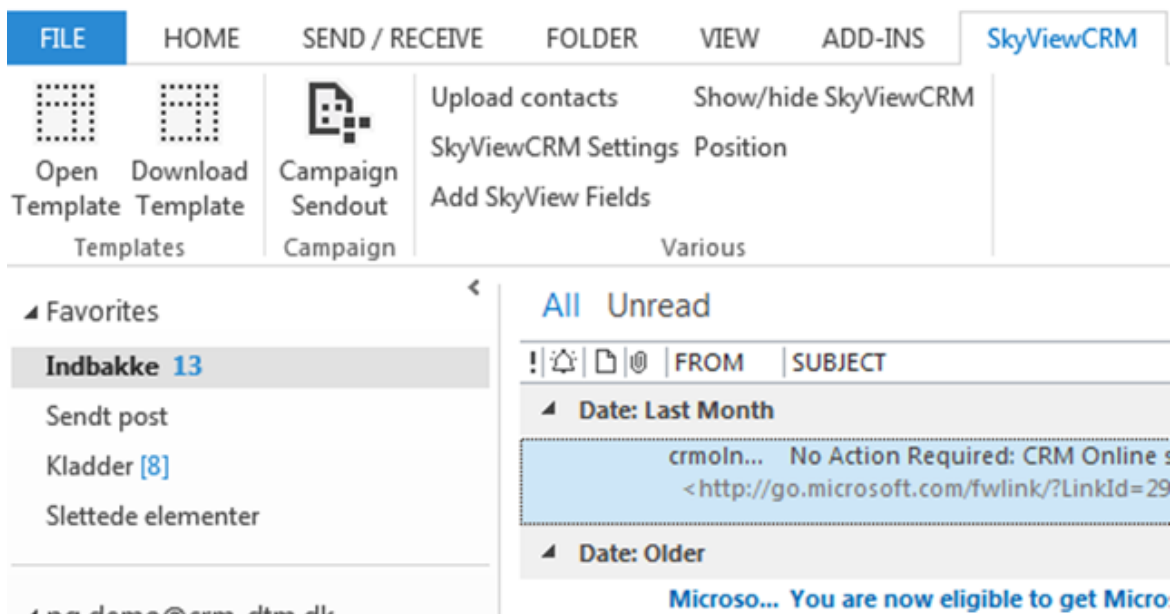
Then you within Outlook choose a campaign, holding the people you are going to mail. You also choose the mail template you will use for the campaign.

Step 1: [Create an Outlook template](#)

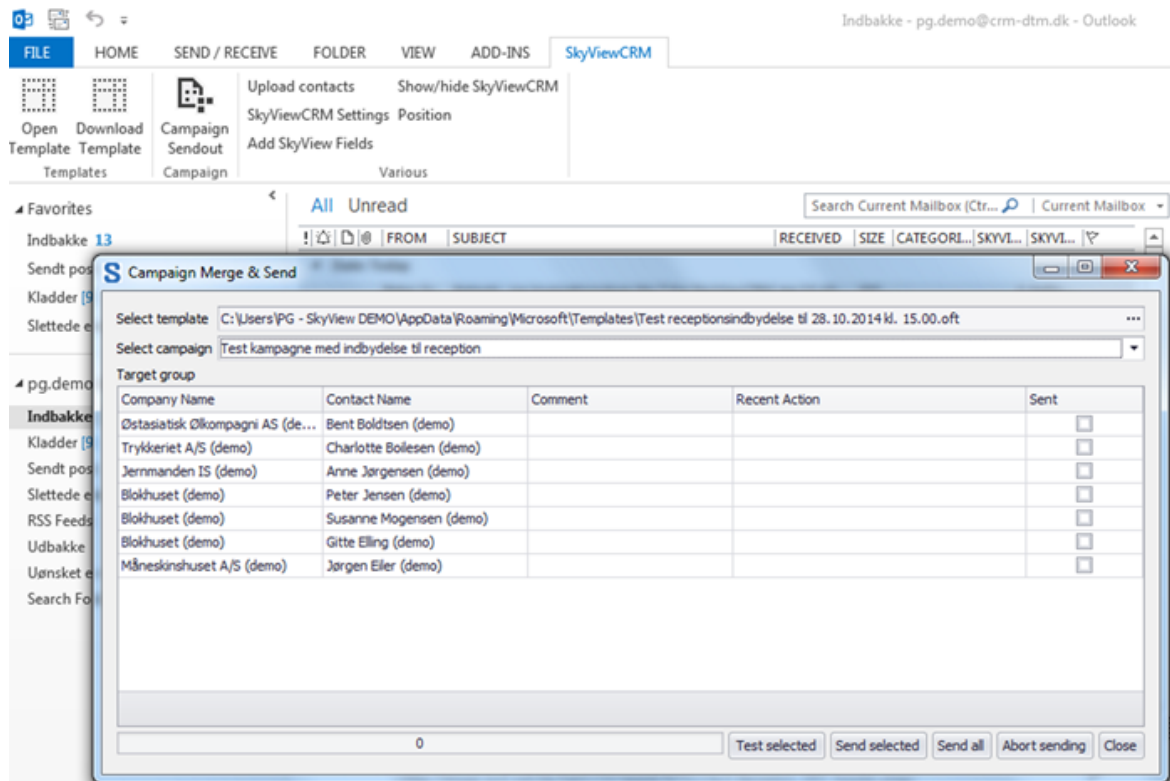
Step 2: [Create a Campaign](#)

Step 3: **Send mails out using Outlook**

Choose “Campaign sendout” from the SkyViewCRM tab.

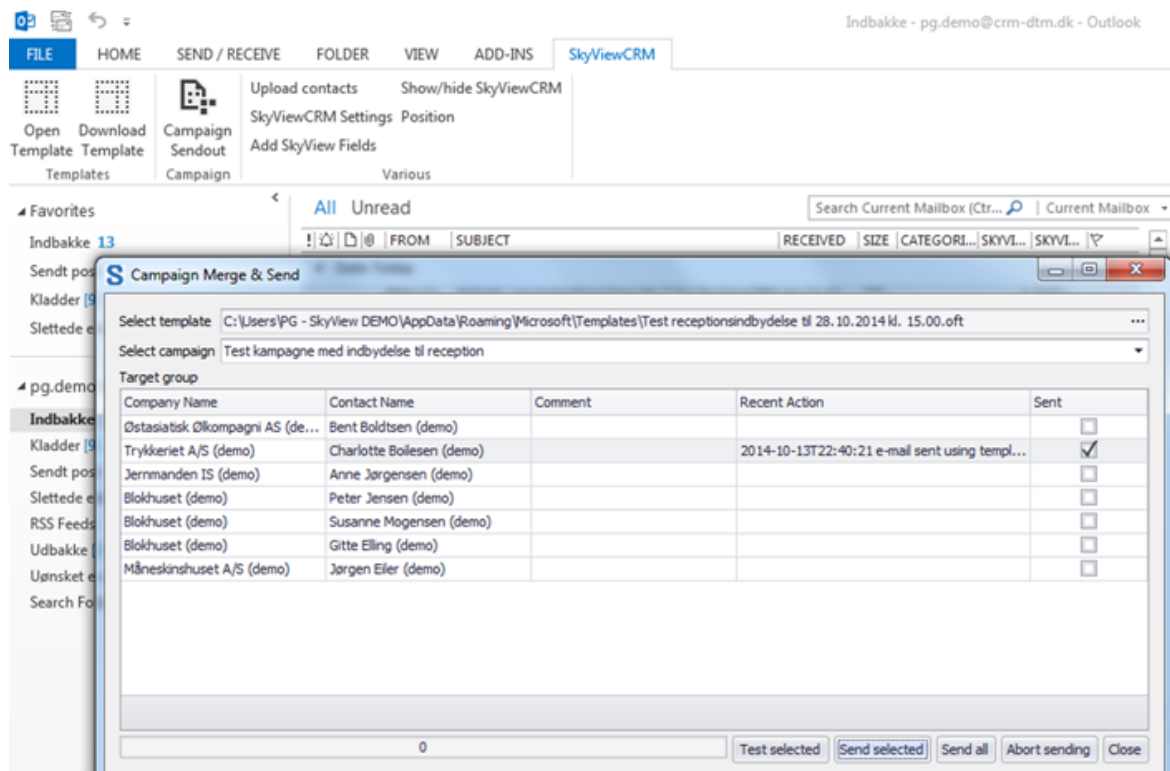


You need to use a local template for the moment – so please download a template from SkyViewCRM and save it locally, if you are not using a local template. In the “Campaign Merge and Send window, you must select your template and the campaign.



Test your template

By clicking and selecting one of the contacts listed, you are able to mail the template to your self. The template will be filled out as if it where send to the selected person.



You can select one or more mails from the campaign and send those out or you can send out mails to all campaign participants.



Contact

Part

17

17 Contact



SkyViewCRM ApS
Blokken 17
DK-3460 Birkerød
Denmark

www.skyviewcrm.com
info@skyviewcrm.com

[SkyViewCRM TeamView Client for Windows](#)
[SkyViewCRM TeamView Client for OSX](#)

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