Webinar - CRM Features Walkthrough

Last Modified on 03/12/2021 4:10 pm EST

View on YouTube

Email sending is disabled by default during the 30 day trial period. Contact us at support@ordertime.com and we can verify your identity to enable this feature in your trial sandbox.

Webinar Notes:

Order Time - CRM Features Walkthrough

- **Download the slides from today's presentation HERE**
- **Types of Activities**
  - **Can be created on a Customer / Order / Etc in the Open Activities Tab**
  - **Can also be created on the Home Screen, Create New Drop-down, or Activities List**
  - **Task**
  - **Event**
  - **Email**
  - **Log**
  - **Custom Types can be created in Settings > Profile Lists > Activity Type**
  - **Activity Types: https://help.ordertime.com/help/activity-type**

- Activity Statuses
    - Open
    - Closed
    - Pending
    - Not Required
    - These can be edited in Settings > Profile Lists > Activity Status
    - Activity Status Editing: https://help.ordertime.com/help/general-profile-list-settings
- Settings > Company Preferences > Activities
    - You can set the default Alarm Time Span
- Events
    - Can be created on an Order or on the Home Screen
    - They have a Start and End Date
    - They close automatically when the time transpires, don't need to be closed like an open activity
    - Adding New Events and Tasks: https://help.ordertime.com/help/draft---activities-event-and-task
- You can see the full schedule from the Calendar on the Home Screen
- Logs
    - Notes on a Customer are shared on QuickBooks
    - If you use the Activity History Tab on a Customer, you can click the Add Log button
    - This will lock in a specific Log on that Customer's history
    - Emails and Logs: https://help.ordertime.com/help/managing-events-and-tasks-from-a-details-page
- Emails
    - Creating an Email and sending it to a Customer creates a log of that email in the Activity History
    - To find the Email Templates
        - Settings > Email Templates
        - Make sure to check out the video once it is up, it shows you how to drag a token into an email template to pull information into your marketing emails.
        - More about Email Templates: https://help.ordertime.com/help/email-templates
- Custom Fields can be added that appear when creating Activities / Events / Logs
- Leads are Customers that haven't been added to a Sale yet
    - Adding Leads: https://help.ordertime.com/help/generate-leads
    - Leads sync to QuickBooks when they become Customers
    - Lead Statuses can be edited under Settings > Profile Lists > Lead Status
    - You can view your Lead List from any page by clicking the Open Full List Drop-down and clicking the Leads list
    - Customer types can be edited under Settings > Profile Lists > Customer Types
        - You can edit Customer Types with Price Levels!
    - Leads can be restricted so that only your Sales Reps have access to

see the current Leads
        - Check out your Roles under Settings > Roles
        - Setting up Roles: https://help.ordertime.com/help/user-roles
- Addresses
    - Under any Customer you can click the Addresses Tab and Add a New Address under their record
    - Editing Customer Addresses: https://help.ordertime.com/help/edit-customer-address
    - You can select a different Tax Code / Tax Item for each address
    - Each Customer Address can be associated to a warehouse location that you would Ship from
- Contacts
    - Each Customer can be associated with multiple Contacts
    - You can add Contacts to a Customer under the Contacts Tab
    - You can make them the Primary from this screen as well
    - You can also manage your Contacts from the Open Full List Drop-down by selecting the Contacts list
    - Vendors can now have Contacts as well!
- Quotes
    - To learn more about Document Statuses: https://help.ordertime.com/help/document-status
    - Quotes can have multiple statuses to deem them as Closed Won / Closed Lost / Processing etc.
    - You can create a Quote from a Lead or within the Quotes List from the Open Full List Drop Down
    - You can filter the Quotes by Status on the Quotes List to just see the deals that you're currently working with or the ones that have been Won recently.
    - Emails from a Quote will automatically attach the Quote as a PDF
    - Once it reaches the correct status, the Convert button appears at the top-left. Then it can become a Sales Order with the Customer attached.
- Alerts
    - Alerts are Automated Tasks created based on actions done in the system
    - You can create Alerts in Settings > Alerts
    - Setting up a System Alert: https://help.ordertime.com/help/alerts
    - You can set up User Groups in Settings > Profile Lists > User Groups
        - User Groups can be set to receive an Alert when a certain status on a document has been changed.
- Credit Hold
    - On a Customer you can put them on credit hold by going to Edit > Payments Tab > Check the Hold Orders checkbox and Save
    - This will keep the Sales Orders from being pushed past a certain status due to the Hold on them
- Under certain terms like Pay on Order your Sales Orders can be held until the Customer has made a full Payment
- We will be adding a Batch Action to the Activities so that you can

change multiple Activities at once

- **Past Webinars**
  - **Head here to see all Past Webinars: https://help.ordertime.com/help/past-webinars**
  - **Today's webinar will be up in a few days!**

- **Review Us!**
  - **QuickBooks App Store**
    - **Click on Reviews and then the button that says Write a Review**
  - **Capterra Reviews**
    - **This takes you directly to the review form**
    - **You can even login with LinkedIn**

For sales inquiries email: kimk@numbercruncher.com

Toll Free 866-278-6243 X 335

Direct Line 954-302-6335

If you have any questions you'd like answered or topics for future webinars, send them to me at michael@ordertime.com

As always, direct support-related queries to: support@ordertime.com