SalesProGo™ Set up

Hello again, this is Tom Wood with Epicor Software corporation with Faraz Sayal and SalesProGo.

And we want to talk about SalesProGo and setting up the product.

With no further ado, I would like to bring Faraz into this conversation.

OK, Faraz, Tell us a little bit about setup.

Thank you very much Tom. Here we're back into the login screen. Once we log into the CRM...

We will now review how to setup the initial CRM deployment once we have it up and running.

The first thing that we recommend for our customers to do is to set up Locations.

Locations is your different storage branches, distribution center under the same company.

This is primarily all being done to set up the employee accounts within the CRM, so as employee accounts are populated, we need to know which default location they need to be tied to.

You customers end up getting tied to their purchasing default location as well, so this all comes in together by creating your location records within the CRM.

On the desktop is where you can add, update, and delete your location record.

On your mobile interface, you have access to only view your different locations.

You can click on the address to launch your map app on your phone or tablet. You can click on the phone number to dial it. That's how it's presented on the mobile version.

On here, to create a location is very straight forward.

We'll put in a location name, usually our customers tend to type in the name of the city where the branch is located, a location ID, we can select a primary contact within the company and tie that person to the location.

We can then put in the contact phone number, fax number, status, and physical address for the location.

Once that's done, the location record gets created.

Here we can see that the location is presented under location, the number of employees tied to that location and the status of that location.

For the system, the next option we have is Departments.

Departments is a company hierarchy, if you will.

The idea with Departments is to create an organization chart that can be elaborate or straight forward.

Doesn't have to be written in stone.

In this particular demo instance in the CRM, we've only created an executive department and we have 29 employees tied to it.

If we wanted to add an additional department under executive, it's as simple as adding a new department, giving it a title, let's call it sales, and put it under Executive.

And then the department gets created under Executive. This is again being done to organize your employees from within the company, and is not necessarily restricted to sales.

It could be back office, purchasing, or anybody you want to have access to the CRM.

It could be set up under different departments within the setup.

It also helps with releasing some of the other information within the company, which we'll talk about primarily within the documents tool.

Once you've got your locations and departments set up, you'll move onto setting up the employees within the company.

The employee page has some additional options here. I can search for employees within the company by name, by the location, by the departments their linked to, by their status, if they are a sales rep, and what is their rep number.

If I were look for all the sales rep within my company, we only have one, and that's Tom Wood set up as a Sales Rep.

Reset your search at any time. You can load 10, 25, or 50 employees per page.

When you set that, that is the record count that will show up going forward for your personal accounts.

If you always want to see 25 records on a page. Employees on a page, that is what you will see going forward.

Adding an employee is very straightforward. You can start with the employee first name, last name, email address, and their initial password that you'll set for them, employee number if applicable.

Contact information, Office number with extension, Home phone number and Mobile phone number if you want to add those.

Anything that is mandatory is marked with a little red asterisk.

So this is base employee contact/account info.

Here we have the employee setup, so this is a current employee. You can have a current employee or a on contract employee.

Once an employee is created, and they've left the company, if they've resigned, or if they've been terminated, it is highly recommended to come in here and change their status.

Resigned will terminate their login, so if that particular employee is logged in from anywhere,

any number of devices, they will automatically be logged out and locked out of the system immediately.

So, that's a little bit of maintenance that would be required for the employees once these employee records are in the system.

You can link an employee to a department, so we will add an employee to sales, we will set them up as an employee or manager of that department.

We will specify if they are a Sales Rep. Checking this box is important for Sales Rep accounts.

It will give them only access to customers that belong to their Sales Rep Numbers, so that's how permissioning is controlled.

In terms of how many customers and what type of customers you are allowed to see accessing the system.

Below that, we will tie that employee to one of our stores, because they do report one particular store or the head office, if you will.

So here, take Austin Distribution as an example.

And we can set them up to have access by location to customers.

What this design is for is branch staff, so they can only see customers that belong to their particular branch.

It is also designed for regional designers or people overseeing multiple branches within the company.

You can choose somebody that has access to two stores within your setup and give them customer by location access.

So they'll only see customers that belong to those 1, 2, 3, 4 locations out of your entire setup.

If you don't check either of them, this particular employee will see the full customer list when they log into the system.

That is how we have set up how many different types of customer records you can see

within the CRM, as you access it as an employee of the company.

Below all of this, we have a permissions scheme table. This is how you determine what employees are able to do

with every single feature, so if we look at employees as an example.

we want this particular user to be able to access the employee list.

They can create employee, they can update employees, and they can view employee records.

So we can control down to a click what a person in the company can do.

Now if this gets to be too much, we have setup schemes.

This is what the Executive Scheme looks like, which pretty much gives them full control of all the features within the system.

You have full control of setting ups schemes yourself, and we're here to help you do that as well if needed.

And by simply choosing an existing scheme, allows you not to have to click on all these options,

but allows these employees to have a certain format as to how and which features they access within the system.

You can also set it, so that the employees can change their password everyday if you want it, every 14 days, 30 days, and so on.

This is a security measure, some of our clients have asked that they want their employees to change their passwords on a regular basis.

Most of them set it to 60 days.

What this will do, it will prompt the employee every 60 day to update their password, they can't use a password they've already used.

It's a security add on, it's available for you to use it. If you don't want to use it, you can leave it blank.

We will now look at an existing employee, so we will search for Tom.

So we have Tom Wood, Tom Webb, and anybody with Tom in their name will pop up.

And this is how Tom is set up, and this is the type of access that you want to give the rest of the company, so they can use the employee tool as a view only, so they can look up employee information.

You've got Tom's Email, Office number, Mobile Number, and just how they're set up within the system.

And if we look at the Update view of Tom, so that we can see that Tom is set up as a Sales Rep with Rep Number 10 and 15.

These can be alphanumeric. We have customers that use AB102, or what have you, Sales Rep Numbers.

And you can attach multiple Sales Rep Numbers to an employee, so when Tom logs into the CRM, Tom is going to see any customer that is linked to Rep Number 10 or 15.

If we let Tom go, we can change his status right now, and update this Account.

As soon as we do this, wherever Tom is and whatever device he is logged in from, he will be automatically logged out.

At any given point, if that wasn't the case, and we wanted to just log him out anyways, we could do a force log out against Tom's account.

We can also see that the last time Tom was active was on November 19th.

Looking at the Desktop version of the CRM on the Home Page.

So we can track a little bit of activity from the employees as well as to what and where they're using the CRM within this setup.

Now if there are a large number of employees that we need to worry about, please know that there are under customer data...

There are tools to do imports, and there is a way to import employees within the system.

You simply download an Employee Template file.

It's very straight forward, asks for employee first name, last name, email address, and so on.

This way we can do a mass upload of multiple employee accounts within the CRM.

Once they’re done, we can configure their access and permission setup or what have you, after the fact.

So that is how you would set up your CRM initially with the base information about your company, your locations, set up some departments, get your employee accounts created and setup their permissions, and off you go!

Thank you very much!

Thank you Faraz.

I wanted to make sure that this was just a recording for the setup of SalesProGo, the next video in the series will be Documents and Supplies.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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