



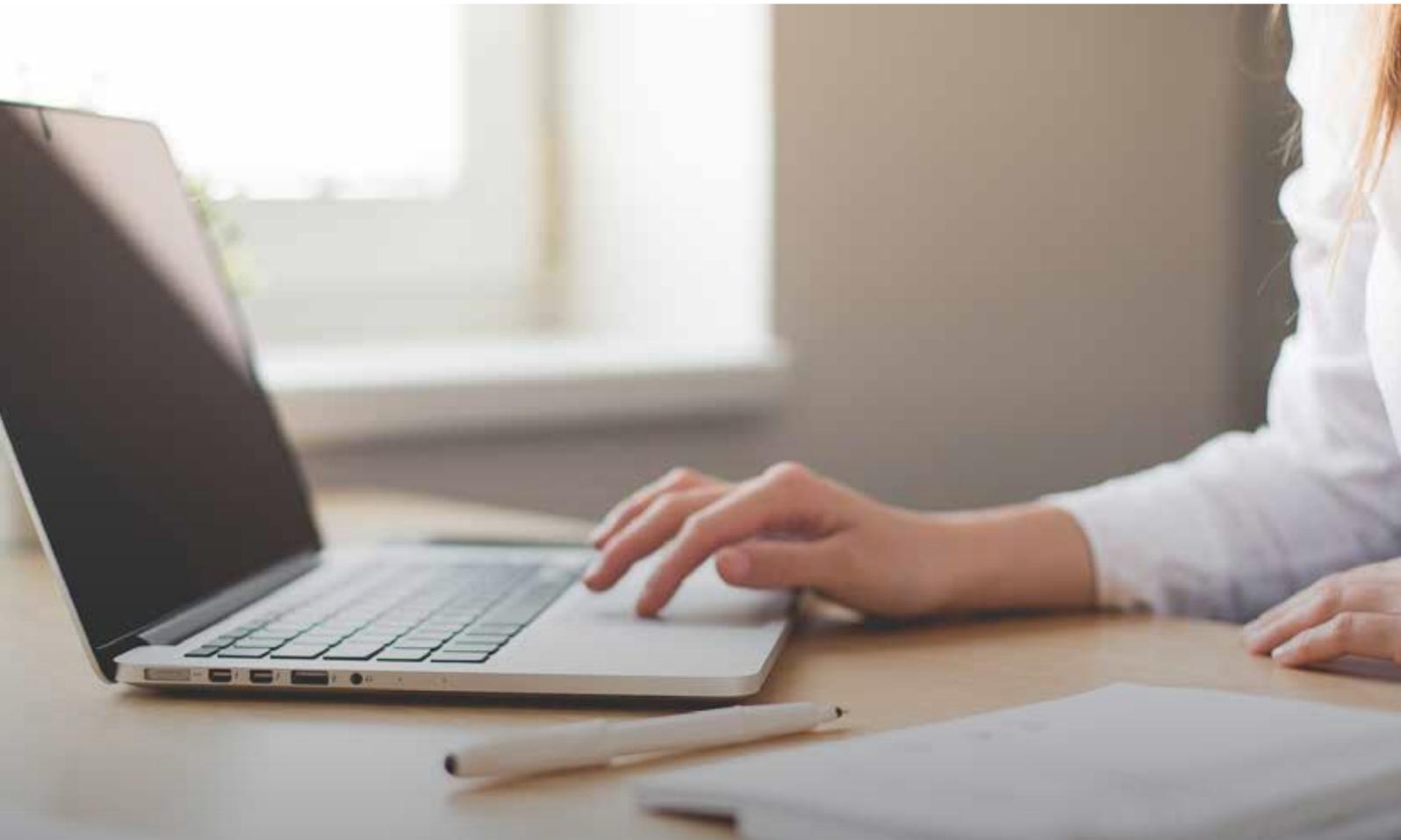
Workbooks.com



MORE THAN CRM,  
*Workbooks is a platform  
to manage your business*

# *Introduction to* WORKBOOKS CRM

Workbooks provides an affordable, feature-rich and cloud-based Customer Relationship Management (CRM) solution that enables small and mid-market organisations to efficiently acquire, convert and retain customers, at a cost significantly lower than the other major CRM vendors.



Workbooks helps marketing departments run campaigns and generate more quality leads; it enables sales team to work more effectively, better identify opportunities, close more deals and grow revenue; it empowers customer support teams to deliver exceptional service and drive customer satisfaction; and it extends beyond sales, marketing and customer support to include order management, fulfilment, invoicing, supplier management and integration with other business systems.

Workbooks joins up the entire organisation around data and processes, promoting teamwork and collaboration. It provides a single 360 view of customers and the information is accessible anytime, anywhere. Productivity is increased, operations are streamlined, insightful decisions are made and the business is better equipped to differentiate against the competition.



Our customers typically use Workbooks solutions for:



CONTACT  
MANAGEMENT



MARKETING  
AUTOMATION



SALES FORCE  
AUTOMATION



ORDER  
FULFILMENT



CUSTOMER SERVICE/  
SUPPORT

## The Workbooks Platform



MARKETING  
AUTOMATION



WEB  
DESKTOP



MICROSOFT  
OUTLOOK



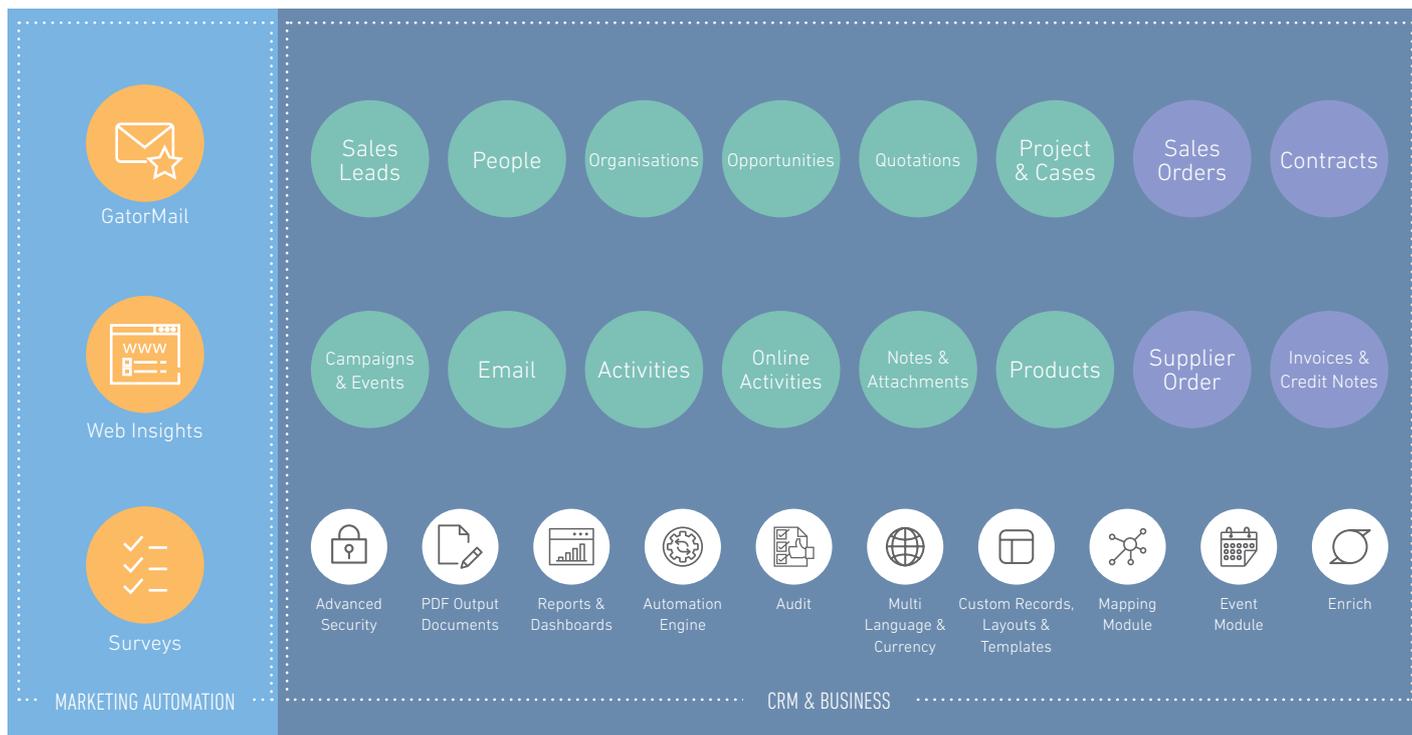
WORKBOOKS  
MOBILE



CUSTOM  
WEB APPS



CUSTOM  
MOBILE APPS





# CONTACT MANAGEMENT

Workbooks CRM allows you to track the Organisations and People you deal with and record Activities, Notes and Email against the right records providing a complete view of your interactions. It allows you to manage Suppliers and Partners alongside Customers, Prospects and even Competitors giving you a clearer picture of your ecosystem.

## Let's have a look at the different types of records in Workbooks:

### Organisations:

An Organisation can be a prospect, a customer, a supplier, a partner, a competitor or a combination of any/all of these. An Organisation record within Workbooks CRM enables you to record and keep track of all the interactions you (and your colleagues) have with other Organisations.

### People:

A Person can be a prospect, a customer, a supplier, a partner, an advisor or a contractor, or a combination of any/all of these. A Person record within Workbooks enables you to record and keep track of all the interactions you (and your colleagues) have with other People. On these records, you can store information such as Job Title, Employer, Telephone etc., and the Workbooks user to whom the person record is assigned.

### Leads:

Leads are used to record details of a person and/or organisation who you have not yet qualified as being a 'real' prospect.

### Activities:

Actions (tasks) carried out in relation to records on Workbooks such as a Phone call, Meeting, or To-do. Creating Activities in Workbooks enables you to track and record the interactions you have with People, Leads and Organisations. You can schedule an Activity to take place in the future, specifying the date that the Activity should take place and/or you can document an Activity that has already taken place.

### Email:

Workbooks enables you to send emails directly to your business contacts and record these emails against the relevant records so that you have a history of your communication.

### Notes:

Information relating to a Workbooks' record, which is not recorded in any other specific field or place. Workbooks enables you to record Notes and attach files to a whole range of records, including: People, Organisations, Leads, Opportunities, Products, Campaigns, Cases & Transaction Documents.

You can create three types of Notes:

1. Free-type information about the record
2. A standardised Note that uses a template with placeholders that are replaced with values from the parent record
3. One that includes a link to a URL and displays the contents of that URL in the body of the Note

### Suppliers:

An Organisation that supplies your organisation with goods or services. Workbooks also allows you to record supplier relationships between organisations other than your own. Workbooks allows you to create relationships between an Organisation/Person and your Own Organisation.

### Customers:

A customer is an Organisation or Person with whom you have transacted business. Workbooks allows you to create relationships between an Organisation/Person and your Own Organisation.





# MARKETING AUTOMATION

Workbooks CRM helps you run campaigns and generate more quality leads. You can segment and target more effectively, capture and manage leads, create dashboards and real time reports and manage campaigns.

We give you the tools you need to execute your marketing strategy and measure ROI.

Marketers are able to leverage powerful tools to execute Marketing Campaigns including:

- Reporting tools to segment data for effective targeting
- Our Web2Lead functionally captures leads automatically from your website
- [Lead management](#) and tracking to distribute leads to the sales teams
- Integration with Google Adwords & Analytics
- Email & Email Templates from within Workbooks CRM also available
- [Campaign Management](#) to track results and measure marketing ROI

Want more marketing functionality? Workbooks offer Marketing Automation capabilities, fully integrated with the core CRM platform to help increase efficiency and impact, drive greater productivity and provide even greater insight:

#### **Workbooks GatorMail**

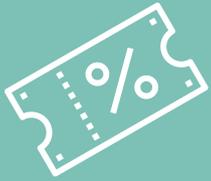
An advanced email marketing tool to easily and efficiently target your audience with highly relevant and personalised email messages.

#### **Workbooks Web Insights**

A web analytics tool to identify anonymous website visitors.

For more information on our advanced Marketing Automation capabilities, please contact us on [success@workbooks.com](mailto:success@workbooks.com) or give us a call on 0118 30 30 100.





# SALES FORCE AUTOMATION

Workbooks CRM enables your sales team to work more effectively, to better identify opportunities, manage pipeline, close more deals and grow revenue.

Sales teams benefit from having easy to use, but effective sales management tools, including:

## Opportunity Management:

Manage sales opportunities, improve conversation rates, drive best practice across your sales team and grow revenue. With a CRM system underpinning your sales execution, you can ensure that your Sales people share a common methodology, understand where their prospects are in the sales process and address their needs effectively - ultimately increasing closure rates.

## Forecasting and Reporting tools:

Forecasting is a prediction of what sales will be achieved within a given period. Sales Forecasts display your estimated sale income for a given time period, based upon the Opportunity stage and the close date you've allocated to each of your Opportunities.

## Quotations:

A Quotation is a document that provides you and your prospective customer with details of the goods and/or services they would like to order, including quantities, prices and terms. You can produce professional quotations based on a Product Book which supports Pricing Schemes.

For more information, click [here](#).



# ORDER FULFILLMENT

**Using Workbooks Transaction Documents, you can create and track your entire sales order and fulfilment process.**

Workbooks allows you to create Orders, Invoices, Credit Notes and Supplier Orders. These records are referred to as **Transaction Documents** which can be quickly and easily converted into PDF format in order to send to Prospects, Customers and Suppliers.

For more information, click [here](#).





# CUSTOMER SERVICE/SUPPORT

**Workbooks CRM empowers you to deliver exceptional customer service. The Workbooks Case Management system allows you to integrate your support teams with the rest of the business.**

Using Cases, support teams can log tickets, assign cases to Queues (a group of users) and Users, set priorities and track the progress of a case.

## **Cases:**

Details are logged against a specific case number to track customers' queries or problems. Workbooks enables you to log customer support Cases, giving priority to urgent Cases and tracking the progress of all Cases.

Our Case Management System also allows you to:

- Associate People and Organisations and define their relationship with the Case.
- Lookup customer Contracts to check eligibility for support.
- Record emails against a Case.
- Use **Email Templates** to respond quickly to common questions and update customers about Case progress.
- Store **Notes** and **Activities**.
- View Case history.
- Link other Related Items such as Orders, Invoices or Opportunities.
- Watch Cases that aren't assigned to you, so you can view how a Case is progressing.
- Classify the Case resolution type in the Resolution Information section. You can then run Reports by Resolution Status to build up your understanding of your customers' problems.
- Allow customers to raise a Case from your Website using **Web2Case**.

**For more information, click [here](#).**



Let's get you  
**STARTED...**



## HOW TO SET YOUR PREFERENCE

**Workbooks has been designed to be easy to run, with minimal need for changes to the Configuration settings.**

Workbooks provides you with a 4-step Quick Start Wizard to help you get started. This Wizard will re-appear every time you log in to Workbooks until it has been completed. Similarly, if you create a new database (either an empty database or a copy of one for which the Quick Start Wizard hasn't been completed), you'll see the Wizard. The Wizard guides you through the initial configuration process including:

- Confirm your Own Organisation's name and address
- Choose your tax regime and currency
- Enter your sales tax and company registration numbers
- Enter your first accounting periods





**So first thing first, take the time to set up your Preferences. You can always modify the settings later.**

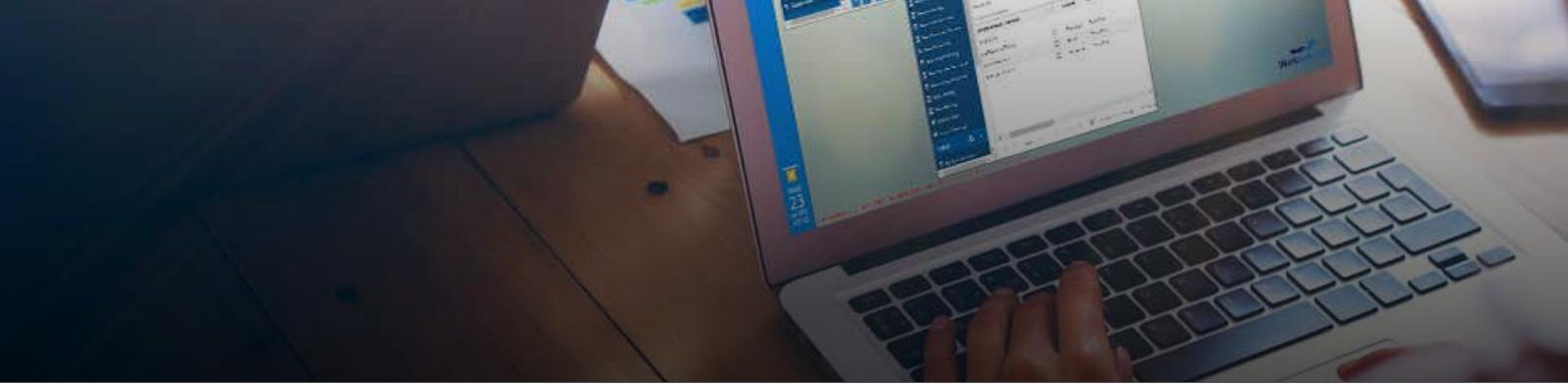
**Within Preferences you can:**

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- Nominate a default [Own Organisation](#) or [Default Transaction Currency](#)
- Choose how many rows of data to display on a page
- Specify how many [Recent Items](#) to keep
- Format the Desktop Interface to control how many windows you can have open at any one time
- Set up telephone integration with your VOIP software
- Configure your [Notifications and Reminders](#) so that they default to working the way that you prefer
- Choose a [Default Language](#) if you have the [Multi Language](#) extension
- Set the appropriate [Time zone](#) for the geographic region in which you operate and the format of the date/time, e.g. DD/MM/YY
- Control the visibility of [Welcome Messages](#)
- Control the 'Quick Search' functionality
- Choose to allow [Workbooks](#) to automatically populate the [Country](#) on a record with the [Country](#) of your [Own Organisation](#)
- Change your [Password](#)
- Create [API keys](#) to allow you to integrate [Workbooks](#) with external systems
- Control your [Pinned Windows](#)
- Control your [Email connection](#)
- Set one or more [Email Signatures](#), which can be applied to emails sent from within [Workbooks](#)
- Configure [Workbooks](#) to store emails sent from an external email client by setting up your [Dropbox](#)
- Check on your [Workbooks Exchange Server Sync](#) settings and synchronisations

For more information on how to set your preferences click [here](#).





## Records you can modify:

### Own Organisations:

An Own Organisation record is used to identify the relationships that exist between your Organisation and other records in Workbooks. It enables you to identify your employees and customers as well as identifying prospects, partners and competitors.

### Transaction currency:

As part of the Workbooks configuration, each of the Own Organisations should be set up with a home currency and a list of permitted foreign currencies.

### **Home Currency:**

This is the currency on which the financial management of an Own Organisation is based. The home or base currency is normally the same as that of the country in which the Own Organisation is registered.

### **Foreign Currency:**

This is any currency which is not the home currency of the Own Organisation.

### Notifications and reminders:

Notification about records that have been assigned either to you or to a queue to which you are subscribed. Workbooks can deliver desktop popups or emails or a combination of both and depending on whether you are logged in or not.

### Welcome messages:

Workbooks includes the ability to compile and distribute messages to specified groups of users within your database, you can learn how to create and display these in our knowledge base.

### Password:

You can control some of the settings that affect all of your Users, including your Password Policies and Languages.

### Pinned windows:

When you log in to Workbooks, the Workbooks User Interface will be displayed. Here you will see the Welcome Message, Bulletin messages or Notifications you have received, a link to our Training Videos page, records and/or Landing Pages you have marked as pinned to launch when logging in, and any Desktop Shortcuts you have created.

### **Email signatures:**

In common with other email software, you can set up Email Signatures within Workbooks.

### Email Signatures can:

- Include pictures (your company logo, for example)
- Be typed directly into the body of an email or be pasted in in HTML format
- Be defined as the Default signature to apply automatically to any email you create in Workbooks
- Be combined with Email Templates to make the template look as though it's specific to an individual

### Workbooks exchange server sync:

Workbooks can communicate directly with Microsoft's Exchange Server. This allows the synchronisation of information between Workbooks and our customer's Exchange servers. This is an alternative to the Workbooks Outlook Connector, allowing compatibility with all of the Exchange clients. For more information contact [success@workbooks.com](mailto:success@workbooks.com).



# GO ONE STEP FURTHER: WORKBOOKS SYS ADMIN

Workbooks has been designed to be easy to run, with minimal need for changes to the Configuration settings.

Once you have confidence in using the system, you can take one step further and start looking at system admin functionalities such as:

- Manage your Users, including creating new Users and User Groups
- Manage security, including **Permissions** and **Capabilities**; Password Policy; limiting access to a specified set of IP addresses, and controlling access to **Databases**
- Manage **Email Server** settings
- Manage **Documents and Templates**
- Customise the appearance of Workbooks records using **Picklists**, **Custom Fields** and **Custom Form Layouts**
- Automate processes using Workbooks Automation



## Permissions:

All individual records (objects) in Workbooks have a set of Sharing Permissions which control who can view and modify that record. When you create a new record, the Permissions it is given are a function of the Sharing Policies and Mandatory permissions in place at that time.



## Capabilities:

Capabilities govern which parts of the Workbooks environment a user can access.



## Email server:

Workbooks can send email that comes "from" the sending User. This means that any replies will go back to the User's email client Inbox.



## Document and templates:

Document Templates are used to create PDF output documents in Workbooks. These are used to create 'final' print-ready documents.



## Picklists:

You can create as many new Picklists as you require but remember that the same Picklist can be used for more than one field so you might be able to reuse an existing one



## Custom fields:

Data field that can be added to the standard fields within Workbooks by a user with System Administrator capabilities. Custom Fields can be created on most Record Types in Workbooks to enable you to store information on your Workbooks database that is relevant to your business.



# Importing data into WORKBOOKS

You can import data into Workbooks from a CSV (Comma Separated Value) file. CSV files are a standard way of exchanging data between systems.

Workbooks Import tool is extremely powerful and allows you to carry out various types of import, for example:

- Carry out a 'simple' import of new data of just one record type, such as importing new Organisations or new Sales Leads or new Products.
- Import new records and 'link' them to existing records on your database. For example, you might want to import new People records and link them to existing Organisation records (because the person is employed by that Organisation), or you might want to import Activities (Tasks or Meetings) that are linked to existing People records.
- Extend the type of import you are carrying out so that you can import more than one record type at the same time. For example, you can import new People records with associated Activities, at the same time.
- Update the fields on existing records. Data that has been taken out of Workbooks for cleansing can be imported and the amended data overwrites the existing information. When using the update mode you can choose between simply updating existing records, or updating existing records AND creating new records, where there is not currently an existing record.

More information click [here](#).



Each import type is based on a specific record type. Below is a list of the types of records that Workbooks can import:



#### **Preparing your data:**

Before trying to import anything into Workbooks we strongly advise that you take the time to review your data and to check its quality and accuracy.



#### **Compulsory fields:**

When importing new records there are certain fields that are compulsory. If you don't populate these fields your import will fail. The fields required differ according to the type of records you're importing. The link below has a table of all compulsory fields



#### **Import template:**

Import templates can be generated from Workbooks to help you import your data



#### **Import wizard:**

Your import should run smoothly if you have prepared the import data and work through the Import Wizard systematically



# Get insight - INTRODUCTION TO REPORTING

**Workbooks provides an extremely powerful and flexible reporting engine which allows you to extract information from your database in the way that best suits your business.**

There are four components to reporting in Workbooks:

## 1. Reports

Reports display a collection of information from the records in your Workbooks system. You can create simple reports to list a set of fields, being returned in the form of columns and rows, much like a spreadsheet. Or you can build a summary report which summarises information, and groups information together. You can use formulae such as totals, counts or averages.

Remember, by default, reports don't have any criteria, which means all records of that record type will be displayed e.g. All Opportunities in the database will be displayed. Add Criteria to return just the records of interest.

Using Workbooks you can also join together records of different types, allowing you to create reports which contain fields from both record types. For example, you could create a report from the People record listing the persons name and email address and then using criteria, limit that report to only include People who have Director in their job title. In addition, you could join to their employer's Organisation record and include the Revenue from the organisation record.

Finally, you could also apply criteria to the Revenue field to only select Organisations with revenues of £5m or more. This allows you to build a report of all people in your database whose job title includes the word 'Director' that work for organisations with revenues of more than £5m.

For more information on Reporting, click [here](#).

For training videos click [here](#).

## 2. Views

It's important to note that reports have multiple views:

- **Details view -**  
This view essentially lists all the data you need to see, perform calculations on, summarise or group by.
- **Summary views -**  
Summary views are created from the Details view. Consider an Opportunities report. You can group by the Assigned to field, then Split the data by Stage. This report gives you a breakdown of what opportunities each sales person is working on, and what Stage the opportunities are at. It's a classic Sales Pipeline report.

## 3. Charts

Once you have built a report you can build a chart from that report. Workbooks supports the following types of charts: Pie, Bar Charts, Line Charts & Dials (dials are similar to a gauge).

Find more information [here](#).

## 4. Dashboards

Dashboards are graphical 'snapshots' of information from your database given to you in real-time, they give holistic visibility of your business; they show you selected reports in an easy to reach manner and are laid out in a way that enables you to monitor the data at a glance.

Dashboards enable you to bring together management information from different reports and charts in a central place. You can create as many dashboards as you require and share them with colleagues and you can drill down through the dashboard to the underlying report data.