MYOB Exo CRM

User Guide

2020.2

myob

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Exo Business CRM

Use Exo Business CRM to keep track of:

- Activities
- Contacts
- Companies
- Opportunities
- Sales Team Budgets
- Marketing Campaigns

You can also:

- Set up pricing and discounting details.
- Create Sales Orders.
- Edit Sales Orders if they have the status **Not Processed**, **Quotation**, **Standing Order**, or **Layby**.
- Create and edit stock items, including One-Off Stock items.
- Use Bills of Materials.
- Use the serial number and batch number searching and tracking functions.

> **Note:** You cannot process Sales Orders, supply stock, or raise invoices from Exo Business CRM.

The Exo Business CRM interface makes extensive use of Dashboard widgets, enabling you to tailor the interface to each user's needs.

Outlook Integration
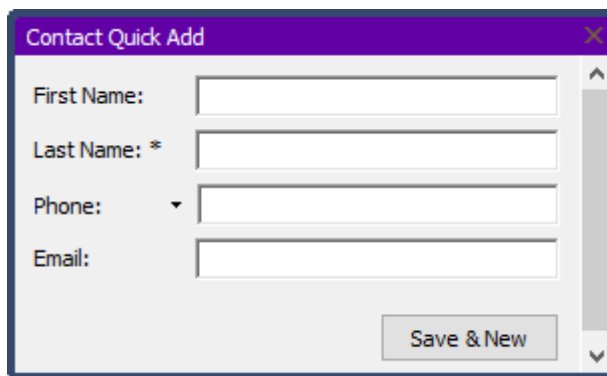
Exo Business CRM integrates with Microsoft Outlook for the two-way synchronisation of Contacts and Activities. If Outlook is not installed, all integration functions are disabled.

> **Note:** Synchronisation with Microsoft Exchange Server is not supported.

Quick Add Widgets

You can use Quick Add functions to create Activities, Companies, Contacts, and Opportunities. You can open records and complete them later.

Quick Add functions are available as Dashboard widgets and as standalone windows:

Licensing

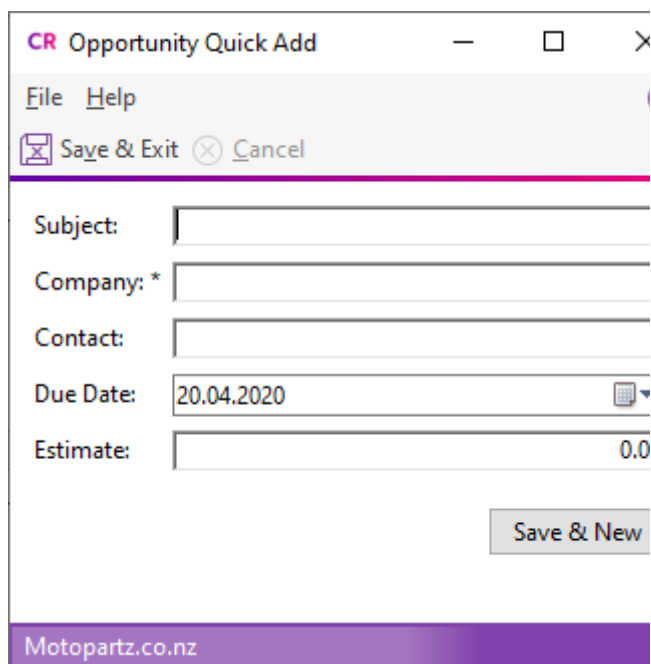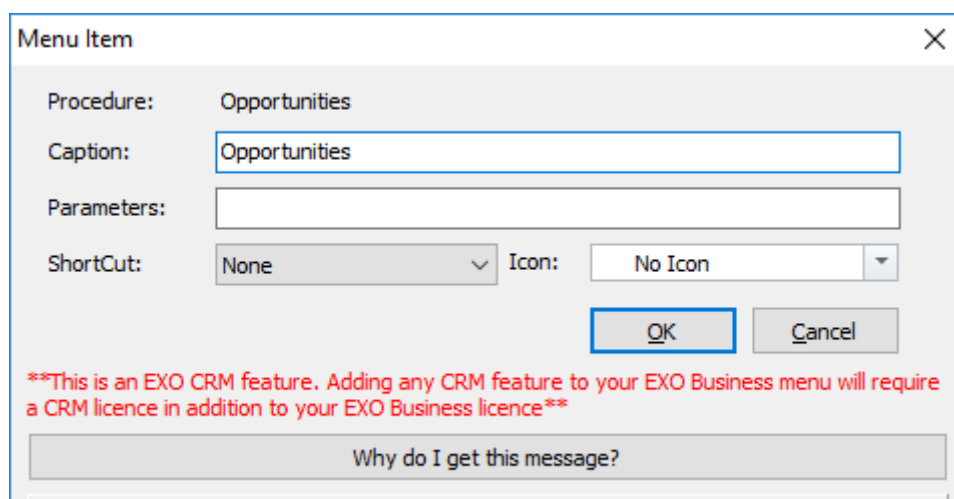The Exo Business CRM module requires separate licences to run. You use one CRM licence when you log into Exo Business CRM.

You can add CRM features, such as creating and editing Opportunities, to menus in Exo Business Core. When you do that, CRM-specific functions are enabled throughout Exo Business — for example, the **Opportunities** tab is enabled in the Debtors and Creditors windows. Authorised users can manage the end-to-end process in Exo Business without switching between the core and CRM modules. However, doing so uses a core licence *and* a CRM licence.

If an employee starts Exo Business Core module and CRM features have been added but a CRM licence is not available, they can quit or run Exo Business with all CRM features disabled.

CRM-specific menu items are marked in the Menu Designer, to avoid users inadvertently using CRM licences by mistakenly adding CRM function to a core menu:

My Day

The My Day view displays when you start Exo Business CRM. It provides an overview of the any upcoming Activities and Opportunities.
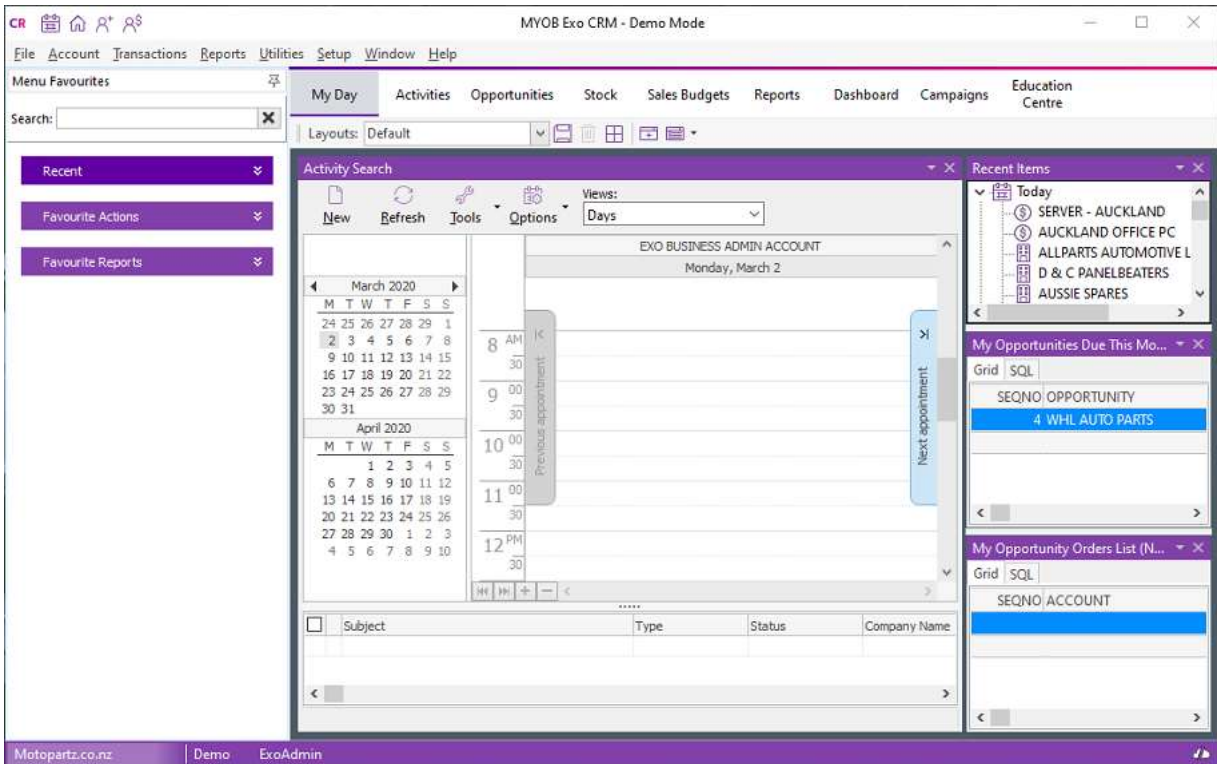
Additional tabs contain workflow menus and widgets that relate to all areas of Exo Business CRM.

All tabs use Dashboard widgets to display data.

Companies

The Companies view in Exo Business CRM displays all Debtors, Creditors, and Non Accounts in one list. Debtors are green, Creditors are red, and Non Accounts are black.
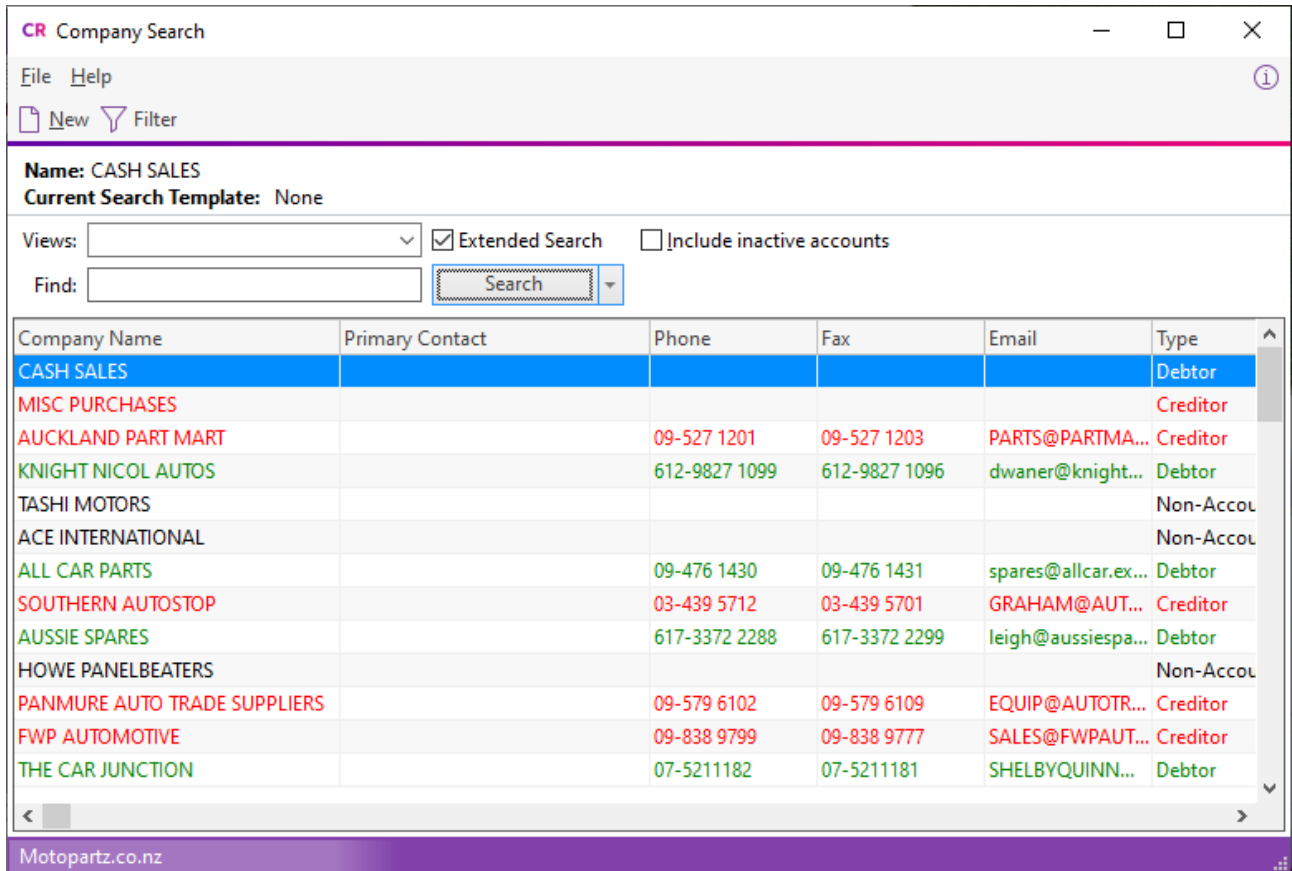
<div style="background-color:green">
Note: The Companies view can also be a separate window and a Dashboard widget that you can add to Exo Business CRM.
</div>

Enter search terms and click **Search** to filter the list of companies. You can also select a view from the **Views** dropdown list to filter the list of companies.

These details display for each company:

Detail	Description
Company Name	The name of the account.
Primary Contact	The name of the account's default Contact, if one was selected on the account's **Contacts** tab.
Phone **Fax** **Email**	The contact details for the account.
Type	The type of account: • Debtor • Creditor • Non Account

Available Functions

Double click on a company to open its record.

Click the **New** button to create a Non Account record, which you can convert to a Debtor or Creditor later.

Right click on a company to:

- Send an email to the company
- Create an Opportunity for the company
- Create an activity for the company

Contacts

Use the **Contacts** tab on the Debtors, Creditors, and Non Accounts screens to create contacts and assign them to accounts. You can also set up contacts independently of accounts from the Contacts window.

You can also maintain a record of how each Contact first heard about your business: newspaper, television, yellow pages or any other and determine the effectiveness of an advertising medium for your future campaigns.
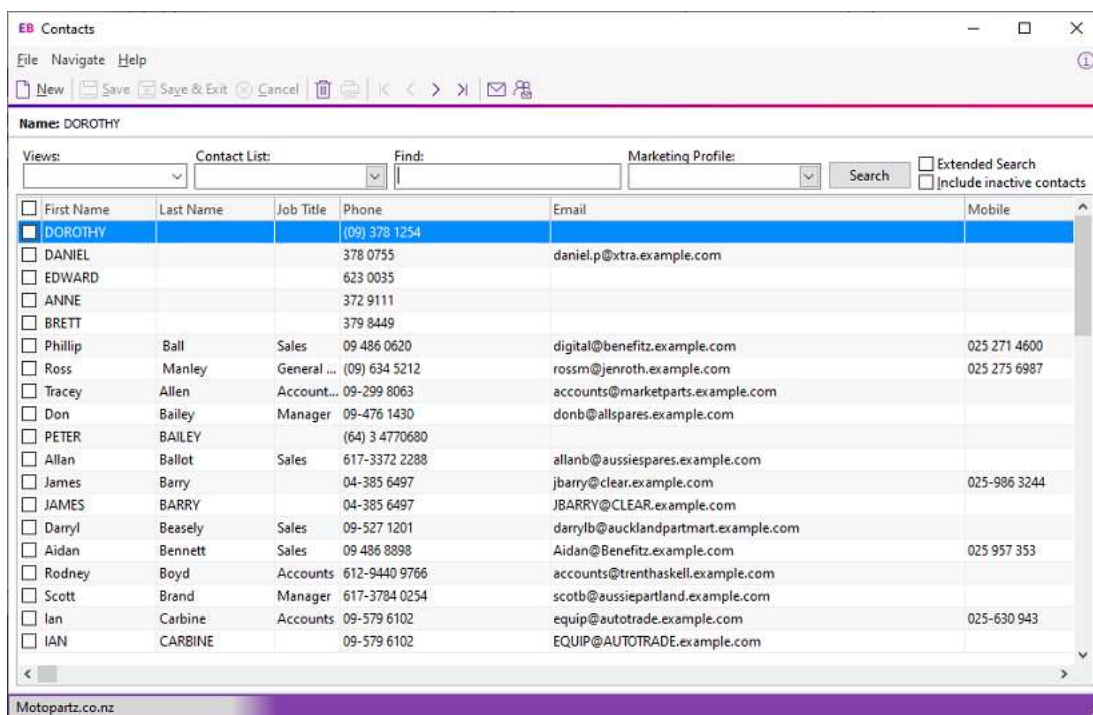
The **Details** and **Marketing** tabs contain information about your Contact. Use the **Notes** field on the **Details** tab to make brief notes about the debtor or Contact listed here.

You can form relationships between contacts and Debtors, Creditors, Non Accounts, and staff.

You can also add the **Extra Fields** tab with related information about the contact like their credit card number, birthday, and hobbies.

Contacts in Exo Business CRM

The Contacts screen in Exo Business CRM lists all of your Contacts.

Synchronising Contacts

You can export the details of Contact records to Microsoft Outlook by selecting:

- One or more Contacts on the Contacts Search widget and choosing **Selected Items > Export to Outlook** from the right-click menu, or

- **Export Contacts to Outlook** from the **Tools** dropdown of the Contacts Search Dashboard widget.

> **Note:** You can only export individual Contacts if the **Sync with Outlook** option is selected on the **Details tab of the Contacts window**.

When you export Contacts:

- New Contacts in Exo Business are exported to Outlook.

- Existing Contacts that have been modified in Exo Business are updated in Outlook.

When exporting Contacts, the details of Contacts in Exo Business overwrite the details of the corresponding Contacts in Outlook.

> **Note:** The **synchronisation options for Activities** also apply to Contacts.

Contacts Master

You can view all account Contacts in the Contacts Master window. Open the window by selecting **Contacts** from the **Account** menu.

> **Note:** To view the Contacts associated with an account, click the **Contacts tab**.
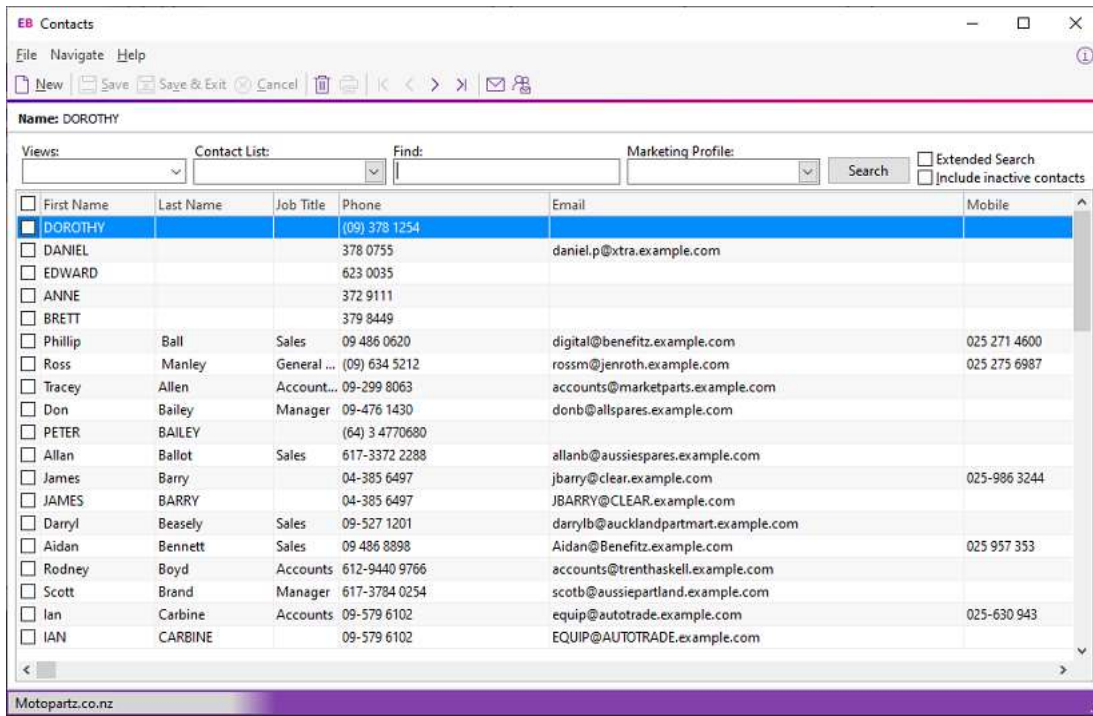
The Contacts master window displays these details for all Contacts:

Field	Description
First and Last Name	The contact's first and last names.
Job Title	The contact's job title.
Phone	The contact's primary landline phone number.
Email	The contact's email address.
Mobile	The contact's primary mobile phone number.
Company Name	The company name for the Contact. This defaults to the company (Debtor, Creditor or Non Account) selected when you created the Contact.

- Search for a Contact by entering search terms in the **Search Key** field and clicking the **Search** button.
- You can filter the list of Contacts by Contact List. You can select multiple classes.
- You can filter the list of Contacts by Marketing Class. You can select multiple classes.

- Double click on a Contact to edit it, or click the **New** button to create a Contact.

- Click the ✉ button to send an email to the selected Contact(s).

- Click the ⧉ button to create and send a Clarity merge letter to the selected Contact(s).

Right click on a Contact to:

- **Send Email** - Send an email to the Contact. This option is not available if the contact doesn't have an email address.

- **New Opportunity** - Create an Opportunity for the Contact.

- **New Activity** - Create an Activity for the Contact.

- **Selected Items > Export to Outlook** - Export the details of all selected Contacts to Microsoft Outlook. This option is only available if Exo Business CRM is licensed.

- **Selected Items > Merge Letter with List** - Create a merge letter to send to the selected Contacts.

- **Selected Items > Add to Contact List** - Select a Contact List to which to add the Contact . This option is only available if Exo Business CRM is licensed.

Contacts Tab

The **Contacts** tab on the Debtor, Creditor, and Non Account screens displays details of the account's associated Contacts.

You can add Contacts to the account, set the default Contact for the account, and create and remove other Contacts associated with the account.

You can email a Contact from this window, or create a mail merge letter to them.

Field Descriptions

Field	Description
Title	The contact's job title.
Salutation	The contact's salutation — for example, Mr, Mrs, or Dr.
First and Last Name	The contact's first and last name.
Direct Phone	The contact's primary landline phone number.
Mobile	The contact's primary mobile phone number.
Direct Fax	The contact's fax number.
Email	The contact's email address.
Home Phone	The contact's home phone number.

To edit a Contact, double click on the Contact's name.

Contacts Tab Toolbar Buttons

The **Contacts** tab is read only. To create or change Contact information, select an option from the **Actions** menu:

- Create a Contact.

- Set the selected Contact as the default Contact for this account.

- Associate an existing Contact with this account.

- Remove the Contact association.

- Send an email to the selected Contact.

- Create and send a Clarity merge letter to the selected Contact.

Adding a Contact

Click the **New Contact** button to add a Contact.

> Note: Before adding a contact, <u>search for that contact</u> as they might already have a record.

Entering Contacts for an Account

You can create new, view, or modify existing Contacts associated with an account.

Account > Creditors or Debtor > {Double Click Account} > (Contacts) > [New Contact]

1. In the Debtor Account Details window or the Creditor Account Details window, click on the **Contacts** tab.

2. Select **New Contact** from the **Actions** menu. The Contacts window opens:

3. Enter details in the fields in this table.

2.

Field	Description
Name	The Contact name can be manually entered here, however it's recommended that you use the name Check Full Name window to enter the details.

	Click on the ellipsis **[...]** button and select the **Salutation**, enter the **First name** and the **Last name**. Click **OK** to enter this full name into the name field.
Company	The company name for the Contact. This defaults to the company (Debtor, Creditor or Non Account) selected when creating this Contact.
Job Title	The job title of the Contact.

Contact Details

Postal and Delivery Address	Click the **Copy** icon in the toolbar to copy details from the selected account. Selecting **Copy company main details** copies the following information to the Contact: • Postal Address • Phone • Fax • Email • Sales person Click the small button next to the Delivery Address to retrieve geolocation details (latitude and longitude) that match the address entered here. An icon on the button displays the status of the match: • - Exo Business hasn't attempted to retrieve details yet. • - details successfully retrieved. Clicking the button again opens your default browser, showing the location on a map. SHIFT+clicking the button will attempt to retrieve location details again. • - an error occurred when attempting to retrieve details. Hovering the mouse over the button will display a popup message indicating why the attempt failed.
Postal Code	Enter the postal code if it is known; if not, click on the ellipsis **[...]** button to search and select a postal code.

Phone Numbers

Email Phone Fax Mobile Home Phone	Complete these fields.

Flags

Active	This option is enabled by default. If this Contact is inactive, deselect this option. Inactive contacts display in grey italics on the search window and on **Contact** tabs.
Sync with Outlook	If this option is enabled, the Contact is synchronised with Outlook whenever a sync is performed.

	If this option is not enabled, the Contact is not included in synchronisation operations.
Opt-Out eMarketing	Select this option if the contact has opted out of electronic marketing communications. You can exclude contacts with this option selected from Contact Lists.
Miscellaneous	
Sales Person	If there is a designated salesperson associated to this debtor or creditor, enter his or her name here.
Advert/Source	Select name of the advertising source through which you received this Contact. If one is not available in the list, click the **Setup** button to create one. In the Setup Advert Types window, click **New** to create a Referral item, then save and exit.
MSN ID **Yahoo** **Skype ID**	If this Contact has account details for these messaging services, enter them here.
Facebook **LinkedIn** **Twitter**	To view social media account information for the Contact, enter their usernames or logon IDs here. **Note:** The LinkedIn ID must be the numerical ID, not a user name. The Facebook ID can be a numerical ID or a Facebook user name, if one has been set up.

3.

4. Click **Save**. A number of additional tabs now appear in the window. Enter Contact information in these tabs.

- **Marketing tab**. Assign the Contact to your marketing classes, or categories, so your marketing campaigns are more targeted to relevant Contacts. Additional Marketing Classes can be setup, when this tab is active a **Setup Marketing Classes** button activates. Click this to configure additional or edit existing marketing classes.

- **Invoices tab.** Lists invoices for which the Contact was the default Contact of the Debtor account.

- **Orders tab**. List any Sales/Purchase Orders associated with the Contact.

- **Notes tab**. Enter notes for the Contact. Use the **New Note** icon on the toolbar to enter a note.

- **History Notes tab**. Enter history notes for the Contact. History notes are notes for which the date and subject are also recorded. Click the **New History Note** icon to create a history note.

- **Docs tab**. Link any documents to the Contact.

- **Accounts tab**. Edit the Debtor or Creditor accounts that the Contact is associated with. For example, a Contact may be the manager of one company, the partner of a manager of another company, the father of a son who works at another company, and so on.

- **Relationships tab**. Lists any other Contacts the Contact has.

- **Activities tab**. Lists any tasks and appointments associated with the Contact.

- **Opportunities tab**. This tab displays when functions from the Exo Business CRM module have been added to the Exo Business core. It lists all Opportunities associated with the Contact.

- **Social tab**. This tab displays information about the Contact from social media services.

5. Click **Save**.

6. To make this new Contact the default Contact for this debtor account, select **Set as Default Contact** from the **Actions** menu.

Once you have set up the debtor Contact, you can also:

- Create a relationship between Contacts.

- Create activities for the Contact.

- Synchronise Contacts with Microsoft Outlook.

> **Note**: If the Contact's address details are the same as those on the debtors account, click the **Copy from Account** button and the details are copied here.

Contact Marketing Classes

On the **Marketing** tab, you can assign the Contact to your marketing classes so your marketing campaigns are better targeted to contacts.
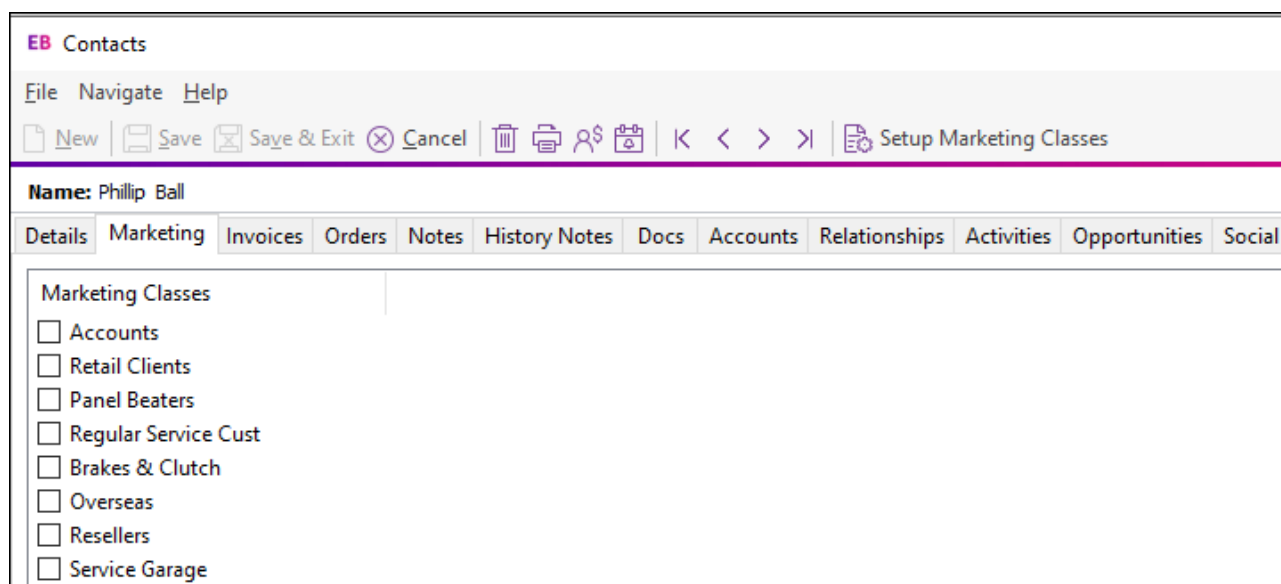
Select the checkboxes for the marketing classes to associate with this contact.

Setting up Marketing Classes

To create additional classes or edit existing ones, click the **Setup Marketing Classes** toolbar button.

Click the **New** button to create a marketing class for the next one in the sequence.
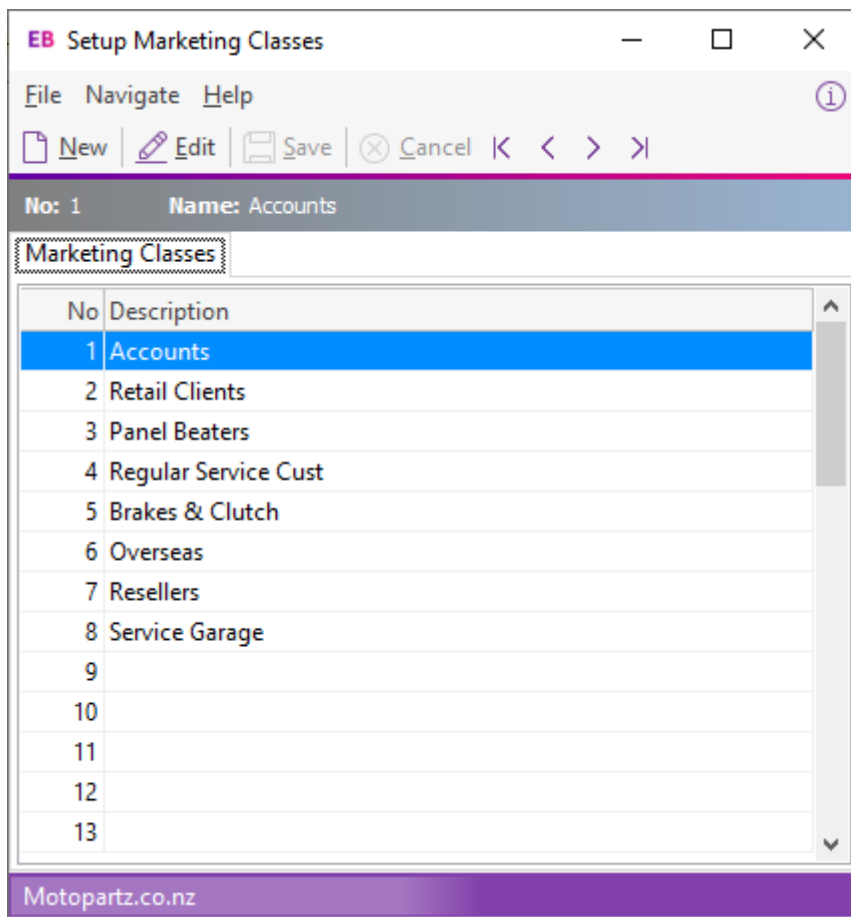
If there are blank classes after last defined class, you should edit them. To edit an existing or blank class, double click on the entry in the list or highlight and click the **Edit** button on the toolbar.

Contact Invoices Tab

This tab lists invoices for which the contact was the default contact of the Debtor/Creditor account.

Contacts Orders Tab

This tab lists the orders associated with the Contact.

> **Note**: You must enable the **Add debtor contact details to transactions** Company-level profile setting in Exo Business Configurator. A salesperson can be associated with **Sales Orders**.

Contact Accounts Tab

This tab displays the Debtor/Creditor accounts that the Contact is associated with. For example, a Contact can be the manager of one company, the partner of a manager of another company, the father of a son who works at another company, and so on.

When you click on the **Contact Accounts** tab, this toolbar displays:
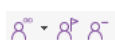
1. Assign the Contact to a Debtor or a Creditor.

2. Set the contact as the default Contact for this debtor.

3. Un-assign the Contact from this account.

Contact Lists

You can set up contact lists to make it easier to send bulk communications to groups of Contacts.

Select **Setup Contact Lists** from the **Setup** menu to open a list of all Contact Lists.

Click **New** to create a Contact List or double click on a Contact List to edit it. You can also right-click on a Contact List and select **Copy this List** to create a list based on the existing one. The **Details** tab displays:

This tab contains these details:

Field	Description
Title	The name of the list.
Notes	Enter additional information about the list in this field.
List Type	Select an option to determine which Contacts a user can choose when building the list on the **List Building Criteria** tab: • Contact - you can select all Contacts. • Company - you can select Contacts that are associated with any type of company account. • Debtor, Creditor - you can select Contacts that are the default Contacts for a Debtor or Creditor account.

- Non Account - you can select Contacts that are associated with a Non Account.

- Debtor Contact, Creditor Contact - you can select Contacts that are associated a Debtor or Creditor account.

- Serviceable Unit - you can select Contacts that are set as the default contact for a Serviceable Unit in Exo Job Costing.

- Subscription - you can select Contacts that are associated with a subscription.

|	
Create Date	The date on which the list was created. This field is read only.
Created By	The name of the staff member who created the list.
Owner	The name of the staff member who is responsible for the list.
Active	If this option is not selected, the list is inactive.
Private	If this option is selected, the staff member can select the list from the **Owner** field. If it's not selected, all staff members can select and use the list.

Click the ⊟ button to hide these details.

Contacts

The bottom half of the **Details** tab displays the details of all Contacts who have been added to the list. Contacts who were added manually are highlighted green. Contacts who were added from the **List Building Criteria** tab are not highlighted.

Double click on a Contact to open the Contacts window to view or edit its details.

Right click on the list to access these options:

- Delete Selected Contacts from List - removes all selected Contacts in the list.
- Delete All Contacts from List - removes all Contacts from the list.

- Selected Contacts Opt-Out of eMarketing - enables the **Opt-Out eMarketing** option for the selected Contacts. If the **Exclude Opt-Out eMarketing** option is selected on the **List Building Criteria** tab, the Contacts are removed from the list automatically.

Adding Contacts to Contact Lists

> If you add a Contact to a list (by any method) or delete one from a list, Exo Business adds an entry to the **History Notes** tab of that Contact.

You can add contacts to a Contact List from the Contacts master screen. Select one or more Contacts, then right-click and select **Selected Items > Add to Contact List**.

You can also click the button to add contacts on the Contact Lists screen. In the search window that opens, select one or more Contacts, then click **Select & Close**.

To select and add multiple Contacts at once, you can build a list on the **List Building Criteria** tab on the Contact Lists window:
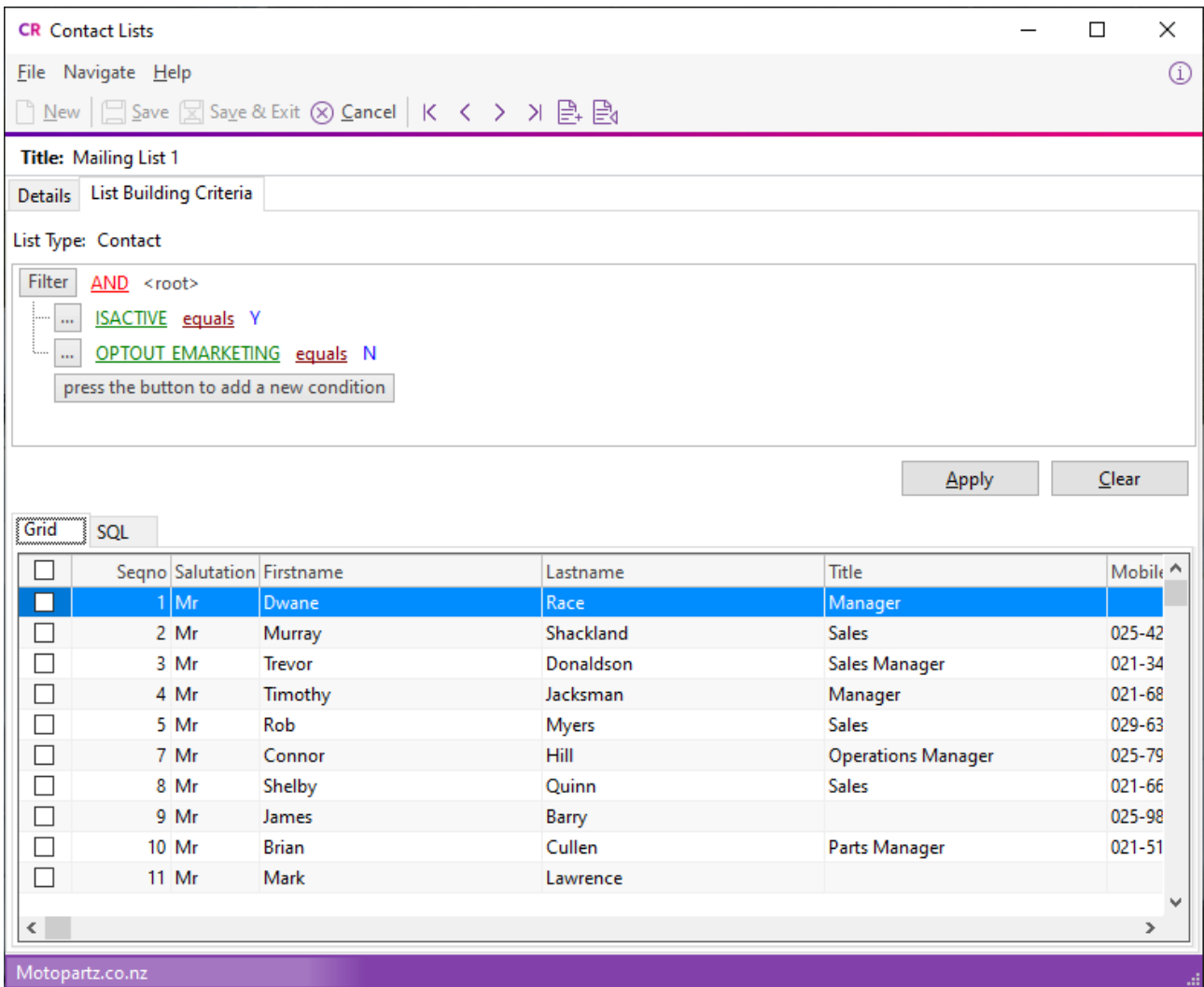
This tab contains an advanced search control. Set filters to specify which Contacts to include on the list, then click **Apply** to populate the **Grid** sub-tab with all Contacts that match the filters.

> **Note:** You can double click on a Contact on the Grid sub-tab to open the Contacts window to view and/or edit its details.

Select all Contacts to add to the list, then right click on a Contact and select:

- 📑 Add Selected Contact to List
- 📑 Add All Contacts to List

> **Note:** You can right click on a Contact List on the Contact Lists search window and select **Refresh this List** to regenerate the list based on the existing list building criteria. This captures changes to Contacts that have been made since the list was last generated.

Selecting Contacts via a SQL Query

For a more advanced way to select Contacts, select the **SQL** sub-tab. This tab displays the SQL query used to populate the filters in the advanced search control:

To customise the advanced search control:

1. Edit the query on the **SQL** sub-tab. For example, you can remove unneeded filters from the advanced search control by deleting them from the query, or add new fields to filter by.
2. Click **Re-Build Filter**.

Clicking the **Preview SQL** button on the **SQL** sub-tab opens a new window showing the SQL query that selects the Contacts in the Contact List:

You can copy the from this window and paste it elsewhere — for example, into a Grid widget or another application.

Manual Mode

Clicking the **Manual SQL Mode** button on the **SQL** sub-tab enables you to edit the SQL statement.

> **Note:** The advanced search control is removed from the tab if you change to Manual SQL Mode. When you put a Contact List is put into Manual SQL Mode and save it, you can't go back to using the advanced search.
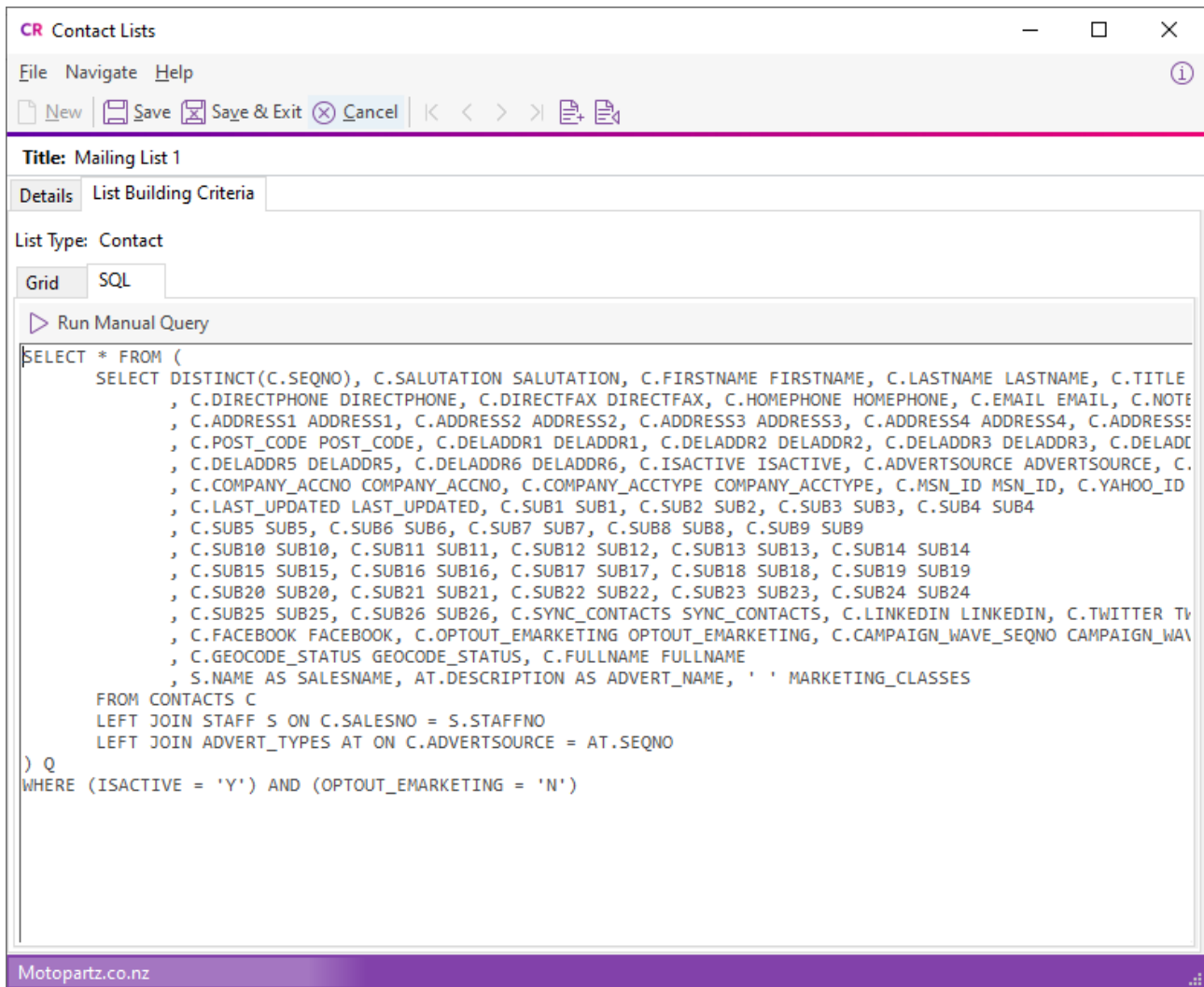
In Manual SQL Mode, enter a SQL statement to specify the Contacts to include in the Contact List and click **Run Manual Query**. The **Grid** sub-tab is populated with the results of the SQL statement.

Emailing Contacts

You can send emails to individual Contacts, groups of Contacts, or all Contacts.

To email Contacts:

1. Select **Account > Contacts**. The Contacts window displays.

2. Select the Contacts to email by:

   - Highlighting a single Contact

   - Holding the CTRL key down, then clicking the Contacts to include in teh email

   - Selecting a marketing class, clicking **Search**, and then selecting all contacts in that marketing class by pressing CTRL + A

   - Selecting all Contacts by pressing CTRL + A

3. Click the **Send Email to List** toolbar button (✉).

4. If you don't have email addresses recorded for all of the selected Contacts, a warning displays. Click **Yes**.

5. A dialog displays asking to hide the CC list in the email. Click **Yes** to hide the email address list.

Activities

Activities

You can set up activities in Exo Business to provide reminders and progress indicators for important events. An activity can be:

- A Task, which is a to-do item that you must complete in a specified time frame.

- An Appointment, which is an event scheduled for a specific time.

You can access activities from:
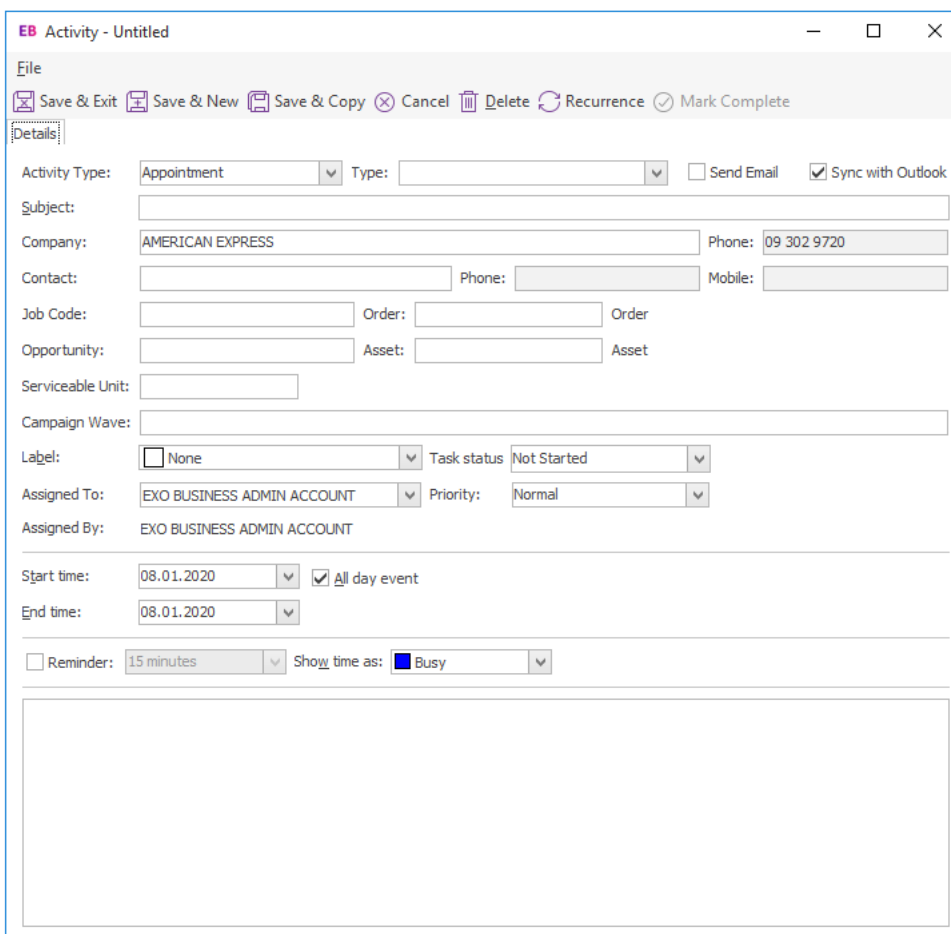
- The **Activities** tabs in the maintenance screens for Contacts, Debtors, Creditors, Non Accounts, and Sales Orders.

- The Activity Search widget, which you can add to the Exo Business business flow menu.

- The Exo Business CRM module.

When using the Exo Business CRM module, activities can be synchronised with Microsoft Outlook. Tasks are converted to Outlook Tasks and Appointments are converted to Outlook Appointments.

Creating an Activity

Click the **New Activity** (📅) toolbar button to create a activity. Or, right click the Activity Search widget's calendar in the time slot in which to create the activity.

The Activity Window

Note: If **Extra Fields** have been set up for Activities, the **Extra Fields** tab is enabled in this window.

Complete these fields.

Field	Description
Activity Type	Select whether the activity is a Task or an Appointment.
Type	This is a user-definable classification for the activity. Select a type from the list, or click **Edit List...** to create a type.
Send Email	Select this option to send an email to all staff members assigned to the task whenever the task is saved. The email is sent to all staff members selected in the **Assigned To** dropdown.
Sync with Outlook	Select this option to synchronise the activity with Outlook whenever a sync is performed.
Subject	Enter a brief description of the activity and its purpose.
Company Contact	You can optionally assign an activity to a Company and/or Contact. If you assign the activity to a company or contact, it displays on the **Activities** tab of that company on the Debtor, Creditor, Non Account, or Contact screen. **Note**: When entering the Company name, use the search option by typing **?** and pressing **TAB**.
Job Code	This field is only available when the Exo Job Costing module is licensed. If the activity was created from a job, that job displays here. You can optionally specify a job to associate with the activity.
Order	If the activity was created from a Sales Order, that order displays here. You can optionally specify a Sales Order to associate with the activity.
Opportunity	This field is only available when the Exo Business CRM module is licensed. If the activity was created from an Opportunity, that Opportunity displays here. You can optionally specify an Opportunity to associate with the activity.
Asset	If the activity is associated with an asset from the Exo Fixed Assets module, the asset displays here. You can optionally specify an asset to associate with the activity.
Serviceable Unit	If the activity was created from a serviceable unit, the unit displays here. You can associate the activity with a unit here.
Campaign Wave	If the Exo Business CRM module is installed, you can associate activities with a campaign wave. **Note:** When creating an activity from the **Details** tab of the Campaigns window, the activity is associated with the first wave of that campaign. When creating an activity from the **Waves** tab, the activity is associated with the selected campaign wave.
Label	Enter a label for the activity. This affects how it displays in calendars.
Priority	A priority (Low, Normal or High) for the activity. Low and High priority tasks are indicated with an icon in calendar.
Status	The Status setting has predefined list entries. You can add to or edit them by selecting the **Edit List...** option.

	For Tasks, clicking the **Mark Complete** toolbar button updates this property to *Completed*.
Assigned To **Assigned By**	The Exo Business Staff members that the activity was assigned to and by.
% Complete	This property applies to Tasks only. Enter the percentage completion by entering a number or using the arrow controls. Clicking the **Mark Complete** toolbar button updates this property to 100%.
Start Time **End Time**	The start and end time for the activity.
All day event	If this is selected, the selections for the time of day disappear as they are no longer valid.
Reminder	If you select this checkbox, Exo Business pops up a reminder after adding a reminder icon. You can enable or disable reminders by selecting the **Enable Reminders** option on the **Tools** menu of the Activity Search window or the Dashboard widget.
Show time as	This property applies to Appointments only. Select how to display the time for this activity on the Task Scheduler: • Free • Tentative • Busy • Out of Office

> **Note:** The relationship between the **Status** and **% Complete** properties is automatically maintained. For example, setting **Status** to *Completed* updates the **% Complete** value to *100*.

Once all properties are configured, click **Save & Exit** on the toolbar to save your changes and close the Activity window. Or, click **Save & New** to save changes to this Activity and reset all fields so that a new Activity can be added.

Activity Recurrence

Click the **Recurrence** button to set an activity as recurring and establish the frequency.
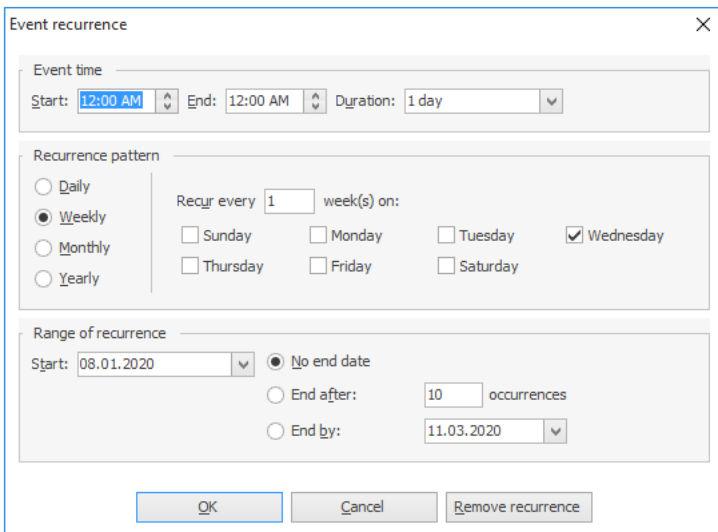
Configure the recurrence options and click **OK** to assign this to the new or edited task. If you are editing a task and no longer need this recurrence to continue, click **Remove recurrence** to remove this from the calendar.

Activities in Exo Business CRM

The Activities view displays all Tasks and Appointments in Exo Business. You can display activities in a simple list or in a calendar.

> **Note:** The Activities view is a separate window or a Dashboard widget that you can add to the Exo Business CRM interface.

List View
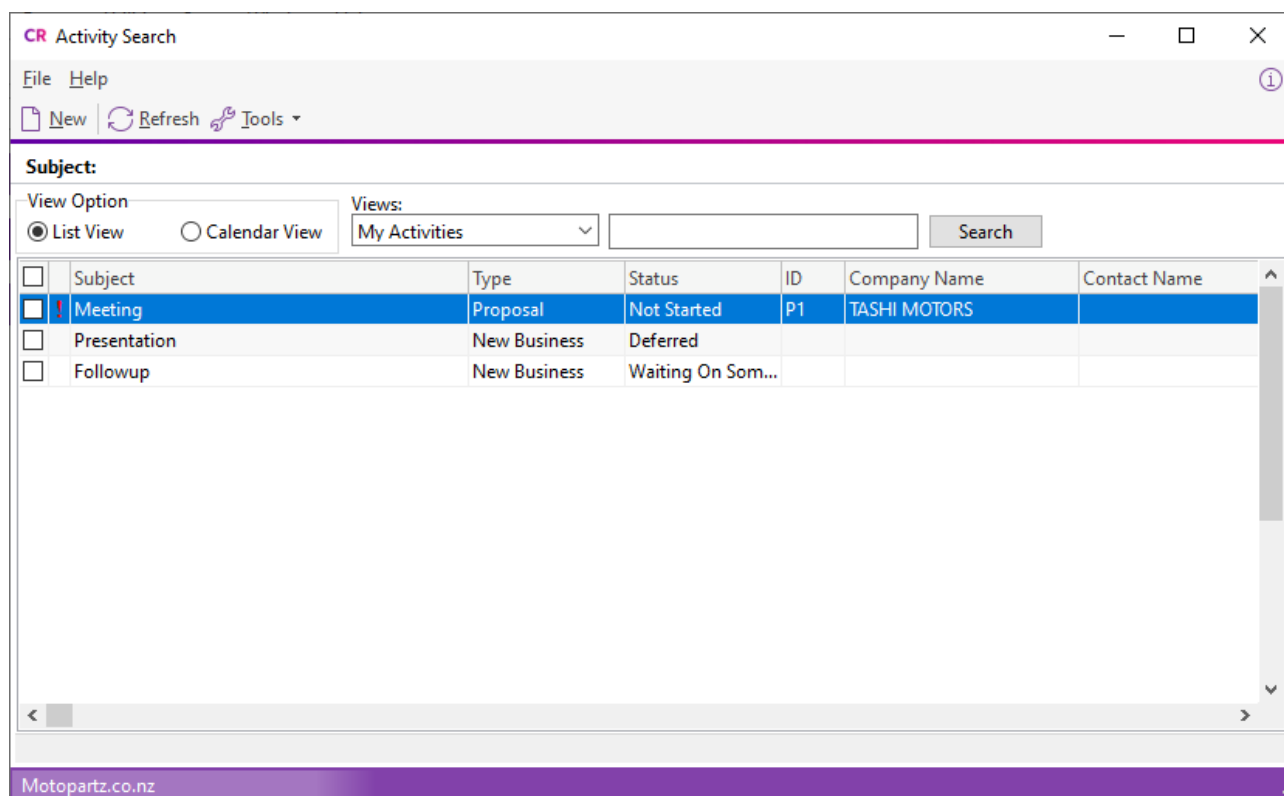
Selecting the **List View** option displays all Tasks and Appointments in a simple list. Tasks are highlighted green. Appointments are not highlighted.

You can select a pre-defined view from the **Views** dropdown to filter the list.

Double click on an activity to edit it.

Click the **New** button to create an activity.

Right click on an activity and select:

- Postpone Tasks - applies to Tasks only. Delays the activity by a specified amount of time.
- Mark as Completed - sets the activity's **Status** to *Completed*.
- Selected Items > Export to Outlook - synchronise the specified activities with Microsoft Outlook.

Calendar View
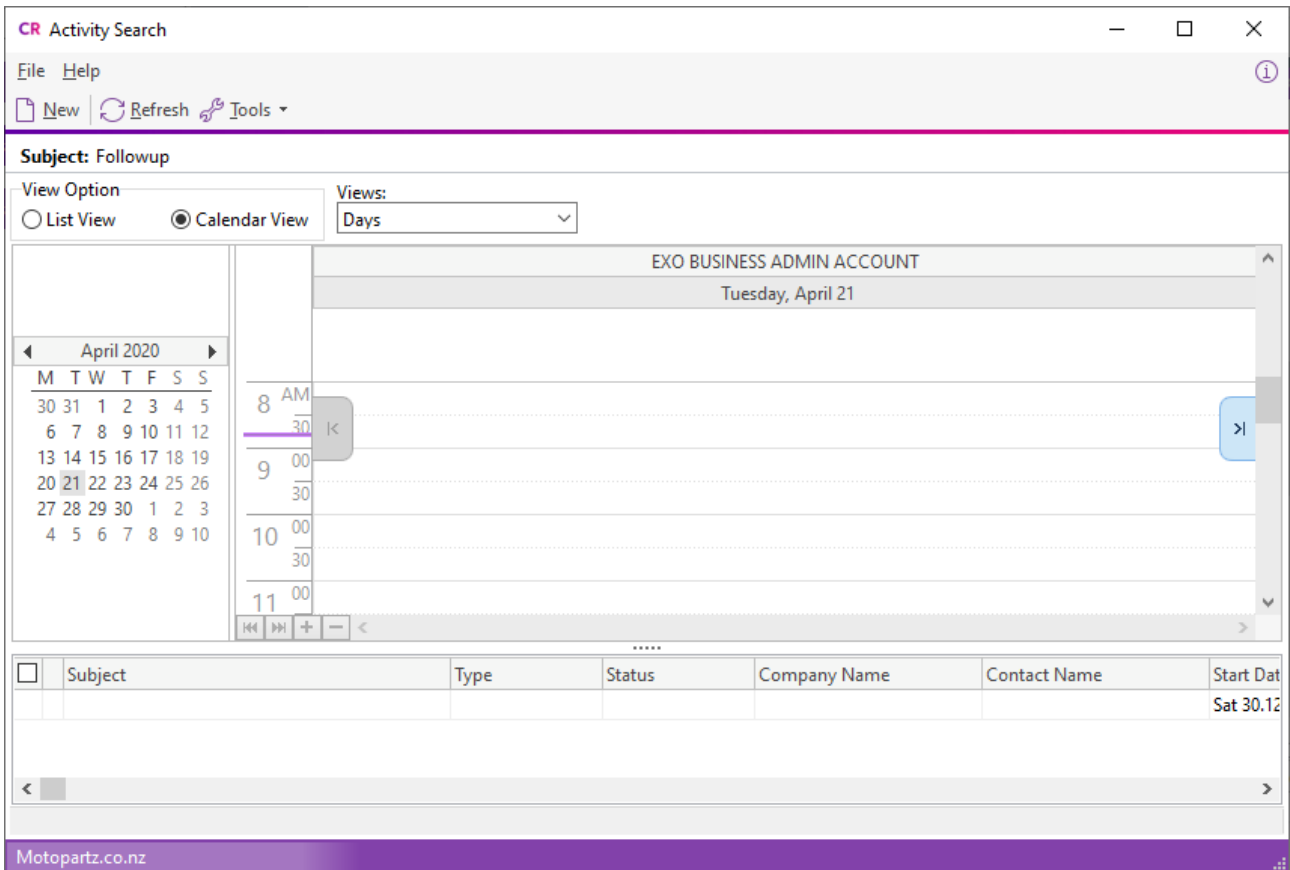
Selecting the **Calendar View** option displays Tasks and Appointments in a calendar view similar to the Task Scheduler in the Exo Business core module.

Appointments appear on the calendar, while Tasks for the selected day display in the section below.

> **Note:** By default, only Appointments for the logged in user appear on the calendar. You can display other users by right-clicking on the calendar and selecting **Resources layout editor**.

Double click on an activity to edit it.

You can create new activities by:

- Clicking the **New** button.
- Double clicking on a time slot on the calendar to create an activity at that time.
- Right-clicking on a time slot on the calendar to create an activity at that time. The right click menu also contains options to create an all-day activity or a recurring activity.

Setup Options

Select **Setup Calendar** from the **Tools** dropdown menu to configure options for the Calendar View:

You can set the days and times worked in your organisation, and set up the time zone(s) that your organisation is in.

Synchronising Activities with Outlook

Use the CRM module to synchronise activities (Tasks and Appointments) between Exo Business and Microsoft Outlook. When activities are synchronised:

- New activities are exported to Outlook.

- New activities in Outlook are imported to Exo Business.

- Existing activities that have been modified in either system are updated in the other system.

In all cases, the distinction between Tasks and Appointments is preserved — for example, activities that exist as Tasks in Exo Business displays as Tasks in Outlook after activities are synchronised.

> **Note:** When updating existing activities, the synchronisation process uses the most recently updated activity as the master and copies this to the other system. If the same activity is edited in both systems before activities are synchronised, only the most recent changes are saved.

To synchronise all activities in a specified date range:

1. Select **Sync Activities with Outlook** from the **Tools** dropdown in the Activities window.

2. Specify the activities to synchronise by selecting a date option. All activities for the selected day or date range are synchronised.

3. Click **OK**.

To synchronise specific activities:

1. In the List View, click the activities to synchronise.

2. Right-click in the list and select **Selected Items > Export to Outlook**.

> **Note:** Individual activities are only synchronised if the **Sync with Outlook** box is selected on the **Activity window**.

You can also:

- Select **Import Activities from Outlook** from the **Tools** dropdown to import activities to Exo Business from Outlook.

- Select **Export Activities to Outlook** from the **Tools** dropdown to export activities to Outlook from Exo Business.

Synchronisation Options

You can control synchronisation based on settings in Outlook. Tasks and Appointments that are marked as **Private** in Outlook are not synchronised.

You can use Outlook categories to control which records are synchronised. In Exo Business, use these User-level profile settings to exclude or include a list of categories:

- The **INCLUDE or EXCLUDE CRM-Outlook categories list** setting determines whether records should be included or excluded based on their category.

- The **List of CRM-Outlook categories** setting specifies the comma-separated list of categories to be included in or excluded from synchronisation operations.

Examples

To set up Exo Business to only synchronise records with the category of *EXO*:

- Set **INCLUDE or EXCLUDE CRM-Outlook categories list** to *Include*.

- Enter *EXO* for the **List of CRM-Outlook categories** setting.

To set up Exo Business to synchronise all records except for ones with the categories *Confidential* or *Personal*:

- Set **INCLUDE or EXCLUDE CRM-Outlook categories list** to *Exclude*.

- Enter *Confidential,Personal* for the **List of CRM-Outlook categories** setting.

To not use Outlook categories with synchronisation operations, set **INCLUDE or EXCLUDE CRM-Outlook categories list** to *Exclude* and leave the **List of CRM-Outlook categories** setting blank.

Opportunities

Opportunities represent transactions that do not yet have a quote. Once complete, you can convert an Opportunity to a quote.

You can create Opportunities for Debtors, Creditors, Non Accounts, or Contacts.

The **Opportunity** tab and/or toolbar buttons display on the Debtors, Creditors, Non Accounts, and Contacts screens if Exo Business CRM features have been added to the core module's menus.

> **Note:** Opportunities do not support foreign currency and hidden costs. Tax-inclusive pricing is supported when converting Opportunities to Sales Orders, but not when converting them to Jobs.

Viewing Opportunities

The Opportunity search window in Exo Business CRM lists all Opportunities in Exo Business. Double click on an Opportunity to edit it.
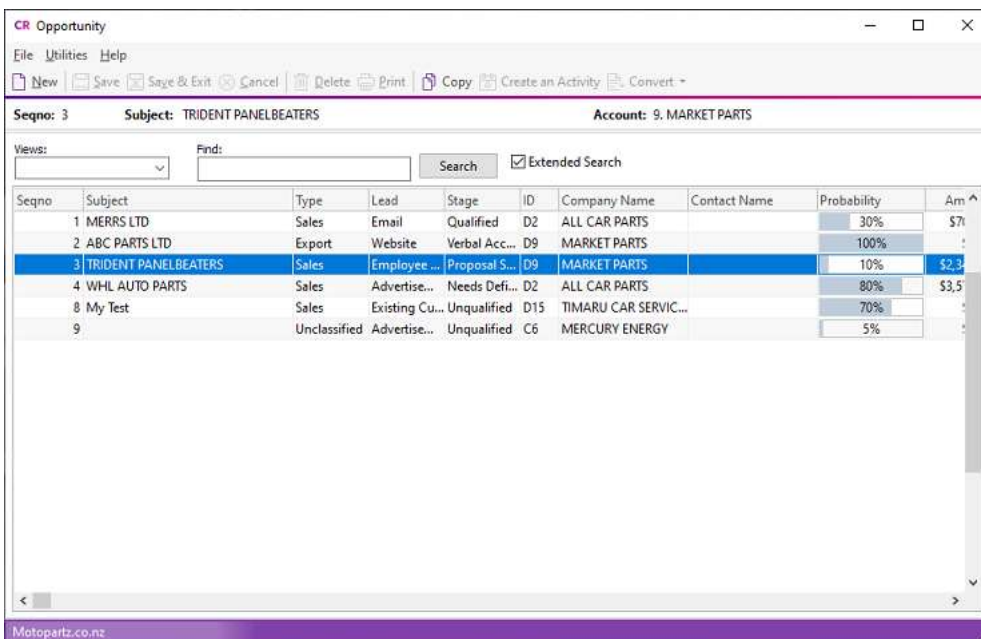
The Opportunity search view can be a separate window or a Dashboard widget that you can add to the Exo Business CRM interface.

Creating Opportunities

To create an Opportunity:

- Click the **New** button on the Opportunity search window,
- Click the ⅋$ button on the toolbar of the account or Contact for which to create the Opportunity, or
- Copy an existing one.

These are the fields on the **Details** tab:

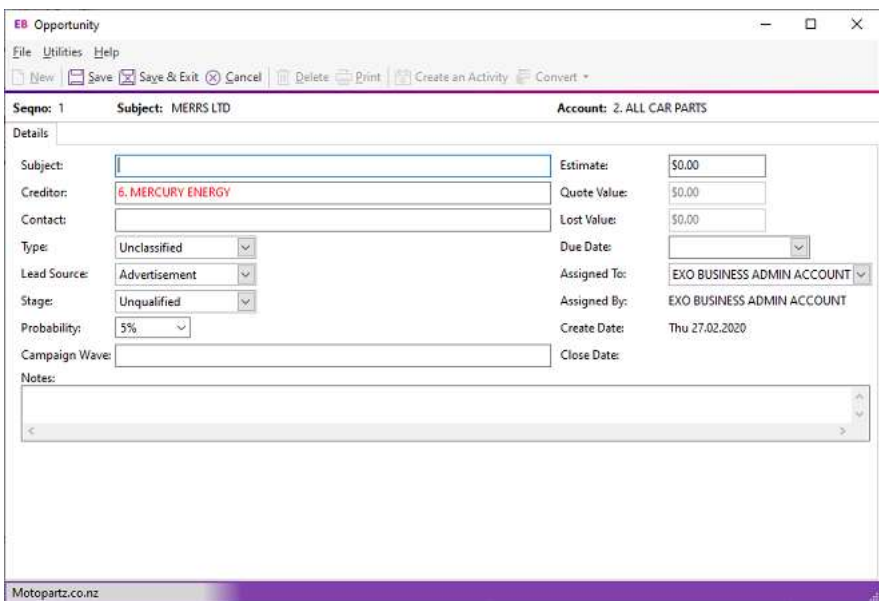| Field	Description
Subject	Enter a description of the Opportunity.
Company Debtor Creditor Non Account	Enter the name of the company account (Debtor, Creditor, or Non Account) that the Opportunity relates to, or type **?** and press TAB to search for one. The label for this field is **Company.** After you select an account, the label changes to reflect the type of account. The colour of the text also indicates the kind of company: Debtors are green, Creditors are red, Non Accounts are black. Note: An Opportunity must be associated with a Debtor account before you can convert it to a quote.
Contact	Enter the name of the Contact that the Opportunity relates to. If you're creating the Opportunity for a Contact, this defaults to that Contact.
Type	Select a type for the Opportunity, or select **Edit List...** to create a type.
Lead Source	Select a lead source for the Opportunity, or select **Edit List...** to create a source.
Stage	Select a stage for the Opportunity, or select **Edit List...** to create a stage.
Probability	Specify the percentage probability of the Opportunity converting to sales. This percentage is used to calculate the **Weighted Val** and **Weighted Est** values.
Campaign Wave	If the Opportunity is associated with a campaign wave, select the wave.
Estimate	Enter the initial estimated value for the Opportunity.
Quote Value	A read-only field displaying the total amount from the **Quote** tab.
Lost Value	The difference between the **Estimate** and the **Quote Value**.
Due Date	Select the date when this Opportunity is due to be completed.
Assigned To	Select the Exo Business staff member who is responsible for the Opportunity.

> **Note:** If the **Default salesperson for converting opportunity quotes** profile setting is enabled, the salesperson assigned to the order is the staff member when the Opportunity is converted to a Sales Order. If the profile setting is disabled, the salesperson is assigned according to the existing **Default salesperson identification method** profile setting.

Assigned By	A read-only field containing the name of the staff member who created the Opportunity.
Create Date	A read-only field containing the date on which the Opportunity was created.
Close Date	A read-only field containing the current date when the Opportunity closes.

You can enter notes below the Opportunity properties.

> **Note:** Opportunities support the Event Log function. Every change to a field in this window is recorded in the AUDIT_TRAIL table and you can report on it.

Additional Tabs

After entering information on the **Details** tab, click **Save**. These tabs are enabled:

- History Notes
- Transactions
- Documents
- Activities
- Social

> **Note:** The **Social** tab uses the social media account details that have been set up for the company that the Opportunity is associated with.

The **Quote** tab is also enabled so you can add quote information to the Opportunity.

Copying Opportunities

To create a Opportunity based on an existing one, click the **Copy** button in the Opportunity search window. The Copy Opportunity window opens:
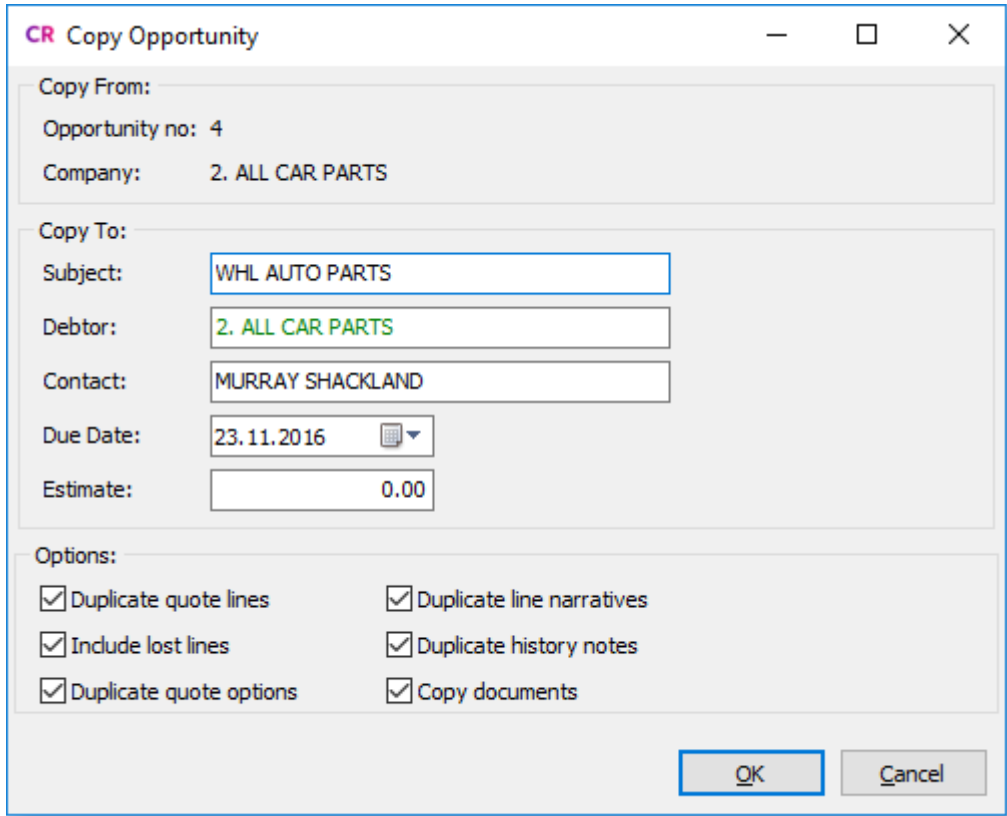
These are the fields in the window:

Field	Description
Copy From	
Opportunity no	The ID number of the source Opportunity.
Company	The company account (Debtor, Creditor, or Non Account) that the source Opportunity relates to.
Copy To	
Subject	Enter a description of the Opportunity. This is copied from the source Opportunity.
Company	Enter the name of the company account that the new Opportunity relates to, or enter **?** and press TAB to search for one. This is copied from the source Opportunity.
Contact	Enter the name of the Contact that the Opportunity relates to. This is copied from the source Opportunity.
Due Date	Select the date when this Opportunity is due to be completed.
Estimate	Enter the initial estimated value for the Opportunity. This is copied from the source Opportunity.
Extra Fields	
	This section displays Extra Fields on the Opportunity whose **Copy field** property is set to *Prompt*. These fields contain the values from the source Opportunity. You can change the values in these fields.

Options	
Duplicate quote lines	Select which attributes of the source Opportunity to copy to the new one.
Duplicate line narratives	
Duplicate history notes	
Duplicate quote options	
Include lost lines	Select this option to copy lost quote lines to the new Opportunity.
Copy documents	Select this option to copy all documents attached to the source Opportunity.

Click **Copy** to create the Opportunity. The Opportunity displays. You can edit it. You can keep the prices of copied line items, or re-apply pricing rules to them.

Opportunity Quotes

To enter quote information for an Opportunity, go to the **Quote** tab.

Field	Description
Group select	Click the checkbox to select the line as part of a group of lines.
Narrative	The 📄 icon displays if the line has a narrative attached. Right click on the line and select **Add Narrative** to add a narrative.
Code	A product code. Type **?** and press TAB to return a list of products. Double click on a product.

Type **.** (full stop) and press T<small>AB</small> to load a Bill of Materials.

Description	A product description. This uses the description of the product from the stock record. You can change it.
Qty	The quantity to supply. The default is *1*.
GST No	Select the GST rate to use for this item.
Cost	The cost of the product. This uses the cost from the stock record. You can change it.
Sell	The selling price of the product. This uses the selling price attached to the customer. You can change it.
Total	This is automatically calculated but you can't change it.
Markup %	This value is automatically calculated, but you can change it. Enter the percentage amount of the new markup, without the % sign— for example, *112.5*.
Status	The status of this line: • LOST • QUOTE • JOB • ORDER When a quote is converted, only lines with the status *QUOTE* are copied to the Sales Order or Job. You can change the status of a quote line by selecting **Set Line Status as Quote** and **Set Line Status as Lost** from the right-click menu. The status of converted lines changes to *JOB* or *ORDER*.
Date	The date on which the transaction was entered.
Cost Type	This column is enabled if Exo Job Costing is installed. Enter a Cost Type, if types are used. Type **?** and press TAB to select from a list of cost types.
Cost Group	This column is only available if Exo Job Costing is installed. Enter a Cost Group, if groups are used. Type **?** and press TAB to select from a list of cost groups.
Disc (%)	The discount applied to the selling price of this line.
Gross Margin %	This is automatically calculated but you can't change it.
Supplier Name	The preferred supplier for any lines that you must order. This is used when creating purchase orders based on the lines that have the **Copy to** option set to *P* on the quote.

From Location	The preferred location to draw stock from if this quote is converted.
Kit No	When you add a kit to the quote, the lines of the kit are given a kit incidence number that holds the components of the kit together. Lines that are not part of a kit have the value *-1*.
Quote Options	This works with the Quote Options defined in the area above the grid. Use these options to split the quote into sections.
Analysis Codes	Analysis Codes are arbitrary codes that you can assign to transactions to group them together for sorting and reporting.
Labour Allowance	Select this option to associate a unit labour allowance with a product. You can enter labour allowance in the Labour Allowance column and it can also default from an extra field on the Stock Item. This value is multiplied by quantity.

You can also add these columns to the tab:

Field	Description
Sell Inc GST	Sell price including GST.
GST	GST value per unit.
GST Total	Total line value of GST.
Total Inc GST	Line total including GST.
ST	The one-letter code for the line's status.
GST Rate	The percentage rate of GST.
Length, Width and Depth	Allow additional factors to apply to quantity. These default to 1.
Total Qty	Used with **Length, Width and Depth** to give the effective quantity when these factors are multiplied by quantity.
Line Type	This is zero but this can indicate: 1 = Kit header 2 = Component
Kit Code	This can contain the BOM code of a kit.
Line #	Line number. This can be edited and used with the ExoGrid sorting capabilities (or Clarity reporting) to re-sequence the lines from their original entry sequence.
Analysis Code 1 Analysis Code 2	Can be used as another coding for posting to the General Ledger.

["

Opportunity Quote Options

Toolbar Options

Change quote total - Click the $ button to alter the quoted values of lines to sum to a specified total. Exo Business prompts for the new total.

Spread new Amount	×
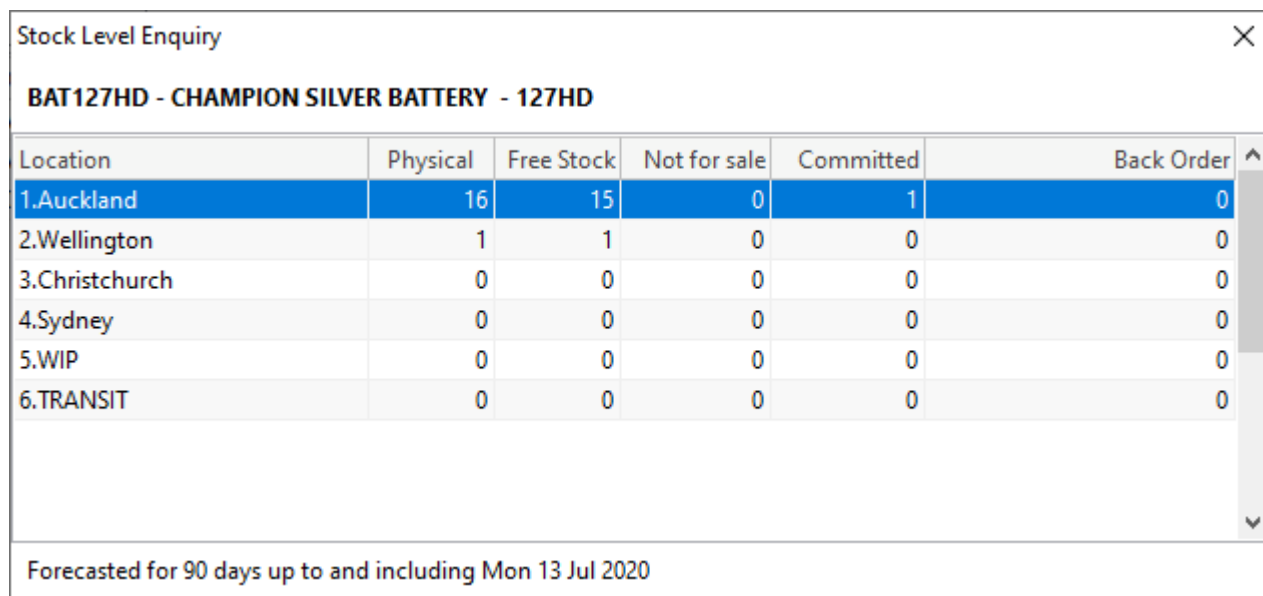
Enter new amount or leave blank to cancel

[   ]

[OK] [Cancel]

Lines are proportionally altered by factoring based old total versus new total (the difference is spread according to the lines original value). If you have some lines that shouldn't be altered, set the value in their Spread column to *N*.

Check for Price Changes - Click the button to check quoted prices against the latest cost and selling prices from the stock ledger. A prompt displays when copying a quote or a job or when converting a quote to a job.

Check Stock Level - Click the ⊘ button to check the current levels of stock for a quotation before it is activated as a job.

Stock Level Enquiry ×
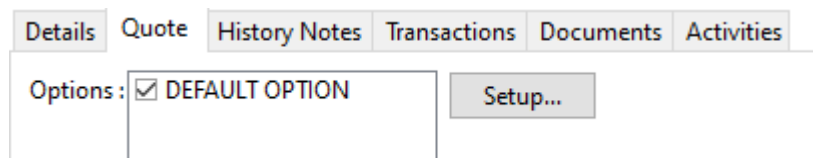
BAT127HD - CHAMPION SILVER BATTERY - 127HD

Location	Physical	Free Stock	Not for sale	Committed	Back Order
1.Auckland	16	15	0	1	0
2.Wellington	1	1	0	0	0
3.Christchurch	0	0	0	0	0
4.Sydney	0	0	0	0	0
5.WIP	0	0	0	0	0
6.TRANSIT	0	0	0	0	0

Forecasted for 90 days up to and including Mon 13 Jul 2020

Move line up/down - You can reorder quote lines by selecting a line and clicking the ↑ ↓ buttons to move it up or down.

Quote Options

| Details | Quote | History Notes | Transactions | Documents | Activities |

Options : ☑ DEFAULT OPTION   [Setup...]

By default, all lines of a job belong to the DEFAULT OPTION, which Exo Business creates for each job. When quoting, you can include additional lines for optional extras or upgrades to the default being quoted.

To create or edit Quote Options, click the **Setup** button. A search screen of additional Quote Options displays. There are no entries for a job which has no options.
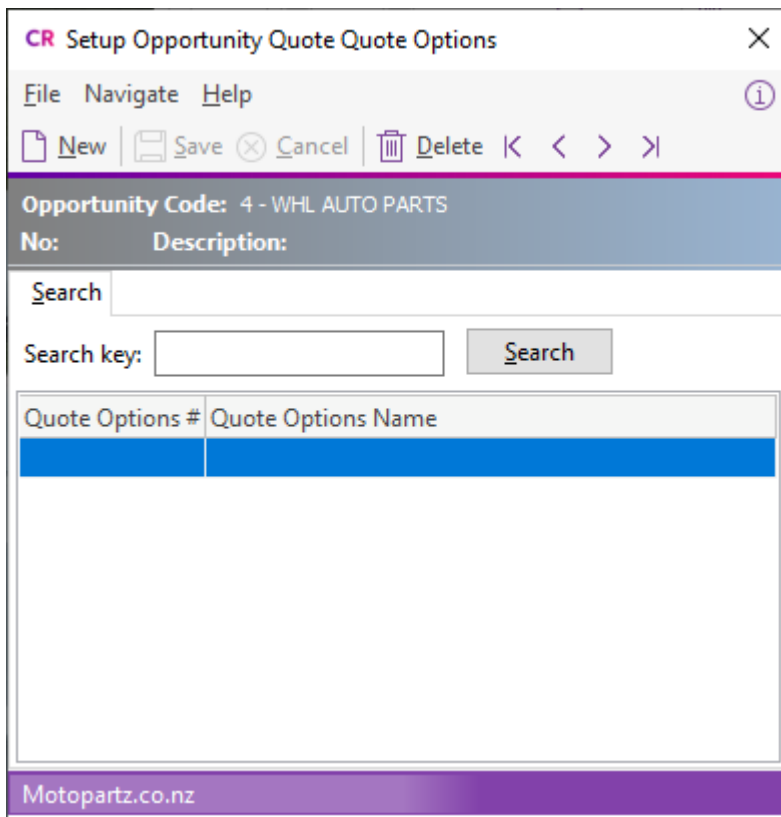
To create an option, click **New**. To edit an option, double click it. You can enter or change the name of the option.

You can change the **Quote Option** column for each line on the **Quote/Budget** tab from the DEFAULT OPTION.

Selecting or deselecting a Quote Option in the header panel includes or excludes that option from the job totals at the bottom of the screen.

You can also use the Quote Option in Clarity reports to provide alternate quoted options within the single job.

Right-click Menu Options

Right-clicking on a quote line displays these options:

> **Note:** Any options specific to Job Costing are not available.

Add Narrative (CTRL+N) - Use this option to add or edit a line level narrative. The narrative editing window opens. Right click in the text area and select:

- **Insert Common Phrases** - adds a Common Phrase to the narrative.
- **Insert Stock Notes** - copies the content of the Notes tab from the Stock Item setup screen.

Set Line Status as Lost/Quote - Use this option to set the **Status** column for the line to *LOST*. If the line is already *LOST*, selecting this option changes it back to *QUOTE*. If you right click on a kit, this option becomes **Set Kit Status to Lost/Quote**, and affects all lines in the kit.

Split line - Use this option to split a line that has a quantity greater than one into two lines. Exo Business prompts you for the quantity to be split-off into the new line:

The remainder of the quantity is left on the original line.

Attach Line to Kit - At least one kit must exist on the job before you can use this function. When you select this option, a screen of kit headers on the job displays. Select the kit to which to append the line. The line is re-sequenced and added as the last line of the kit.

Remove Line (CTRL+DEL) - Select this option to delete the current line from the job. A confirmation request displays.

Check Stock Level - Select this option to check the current levels of stock for a quotation.

Kit Functions

When you right click on a kit header or one of its components, you can select these options:

Append Component Line - Select this option to add lines from the Bill of Materials to the kit. These are lines that have been marked as non-default and were excluded when the kit was originally added to the job. These non-default BOM lines can be substitute items or optional extras.

Append Stock Item Line - Select this option to append a stock item line from the Stock file. Selecting this option displays the entire stock list in a search screen. The item you choose does not have to be an item pre-configured as optional in the Bill of Materials.

Substitute Component Line - This option is only enabled when you right click on a component line on the **Costs** tab. Select this option to choose a component item to replace the selected item.

Extra Kit information - Select this option to enter additional information about the kit.

This information is for record keeping and you can print it on customer reports. The serial does not exist in the main stock serials list. If an asset is produced for the job and this is a serialised item, you must add the serial number.

Copy Bill Notes - Select this option to copy the notes from the Bill of Materials setup screen into a narrative on the kit header line within the job.

Marked Lines

The functions under **Marked Lines** on the right-click menu operate on the lines which have options selected. You can select or deselect lines in the column header row. The **Marked Lines** submenu contains these options:

Set Markup % - Select this option to enter a markup percentage. Exo Business adjusts the sell prices of the selected lines.

Set Gross margin % - Select this option to enter a gross margin percentage. Exo Business adjusts the sell prices of the selected lines.

Set Cost Types - Select a cost type to apply to the selected lines.

Set Cost Groups - Select a cost group to apply to the selected lines.

Opportunity Stages

Opportunity Stages indicate the point an Opportunity is at in the sales cycle.

For example, an Opportunity may be at the stage of Unqualified, Qualified, Solution Defined, Proposal Submitted, and Closed. That Opportunity could have two stages representing closed Opportunities: those that closed after being processed to a sale (*Closed Won*), and a stage that represents when an Opportunity did not result in a sale (*Closed Lost*). Both stages are non-active Opportunities, and probably Locked. You can differentiate between these two Closed stages in analysis reports.

To set up Opportunity stages:

1. Select either:

    o **Setup > Setup Opportunity Stages** from the Exo Business CRM menu, or

    o **Edit List...** from the **Stage** dropdown on the Opportunity window.

    The Setup Opportunity Stage window displays:
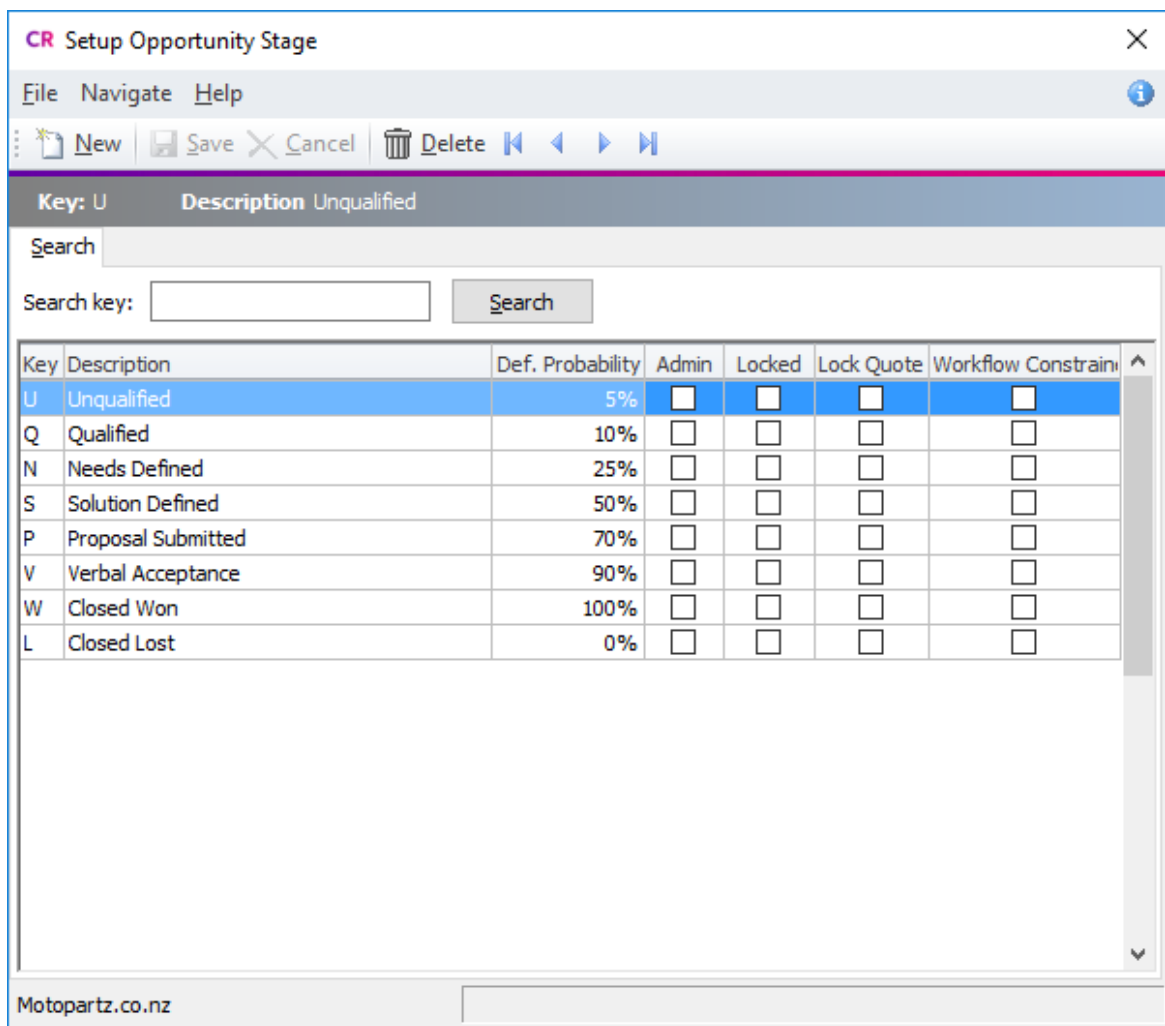
2. Click **New**. Enter the details about the stage.

Field	Description
Opportunity status key	A unique one-character short code to represent this stage.
Opportunity status name	A description of the stage — for example, *Qualified*.
Prevent new transactions	Select this option to prevent entry of additional transactions to Opportunities at this stage.
Make opportunity read only	Select this option to disable editing of the Opportunity while at this stage. This includes the **Stage** field. Only a user who has administrator rights can modify this Opportunity (this is determined by the **User has Opportunity Administrator Rights** User-level profile setting).
Opportunities are complete	Select this option to indicate that Opportunities in this stage are complete.
Quotations read only	Select this option to lock the **Quote** tab to prevent changes while the Opportunity is at this stage.

	The **Quote** tab is locked unless logged in as a user with administrator rights.
Opportunities are archived	Select this option to archive Opportunities in this stage.
Workflow Constraints Apply	Select this option to specify which stages the Opportunity can move to.
Opportunities are ready to invoice	Select this option to indicate that Opportunities in this stage are ready to invoice.
Opportunities are active	Select this option to indicate that Opportunities in this stage are currently active.
Def. Probability	Select the default Probability level for Opportunities at this stage.

3. If the **Workflow Constraints Apply** option is selected for a stage, click on the ⚙️ button to open a screen on which you can specify workflow stage paths.
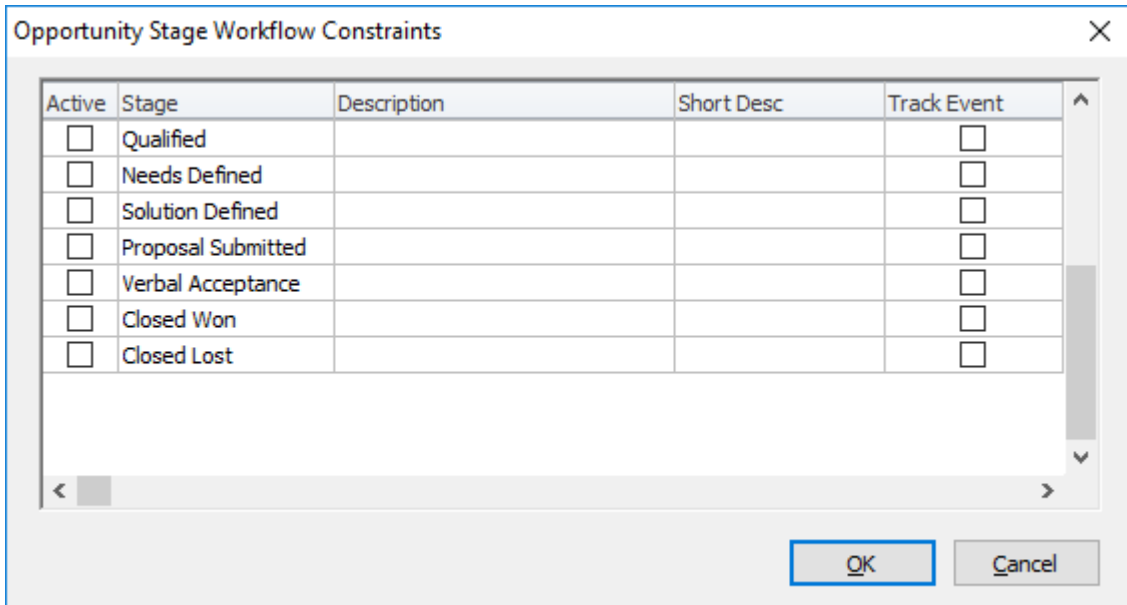
4. Select the checkboxes in the **Active** column to specify which stages you can move an Opportunity to.

5. Select the checkboxes in the **Track Event** column to record the history of changes to the stage in the Event Log.

Sales Team Budgets

Use Sales Team Budgets if your business focuses on selling to existing clients and you manage their sales staff by comparing actual sales to budgeted sales.
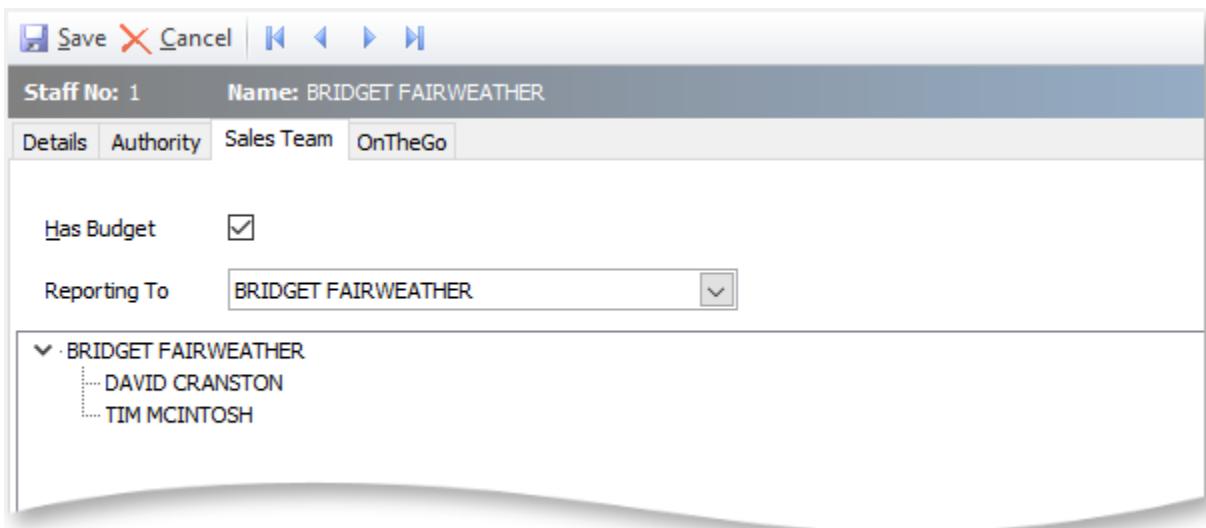
You can defined Sales Team Budgets at these levels:

- Account Group 1 and 2
- Account
- Stock Group 1 and 2
- Stock item

Setting Up Sales Team Budgets

Setting Up Sales Staff

Staff members are set up as members in Exo Business Configurator under **Staff > Profile Assignment > Staff > Sales Team**.

Select the **Has Budget** option for each staff member who is to have a sales budget.

Select the select the sales manager to whom the staff member reports from the **Reporting To** dropdown list. By default, staff members are their own managers. Specifying managers for staff members affects the budget generation process. When you edit a budget, users can see the budgets for all staff members that report to them. This is hierarchical. If Staff Member A reports to Staff Member B, and Staff Member B reports to Staff Member C, then C can view the budgets for both A and B. The area below the **Reporting To** option contains a tree view showing all staff members who report to the selected manager.

Setting Up Sales Years

Sales Team Budgets use the same budgeting periods as the Exo Business Analytics module. These periods are set up in Exo Business Configurator under **Admin > Analytics > Setup Sales Year**.

Setting Up Budget Models

Before creating Sales Team Budgets, you must define the models that the budgets will be based on. Budget models define the levels to budget at and the sales period to budget over.

Select **Setup Sales Team Budgets** from the **Setup** menu to set up budget models. All currently budget models display.
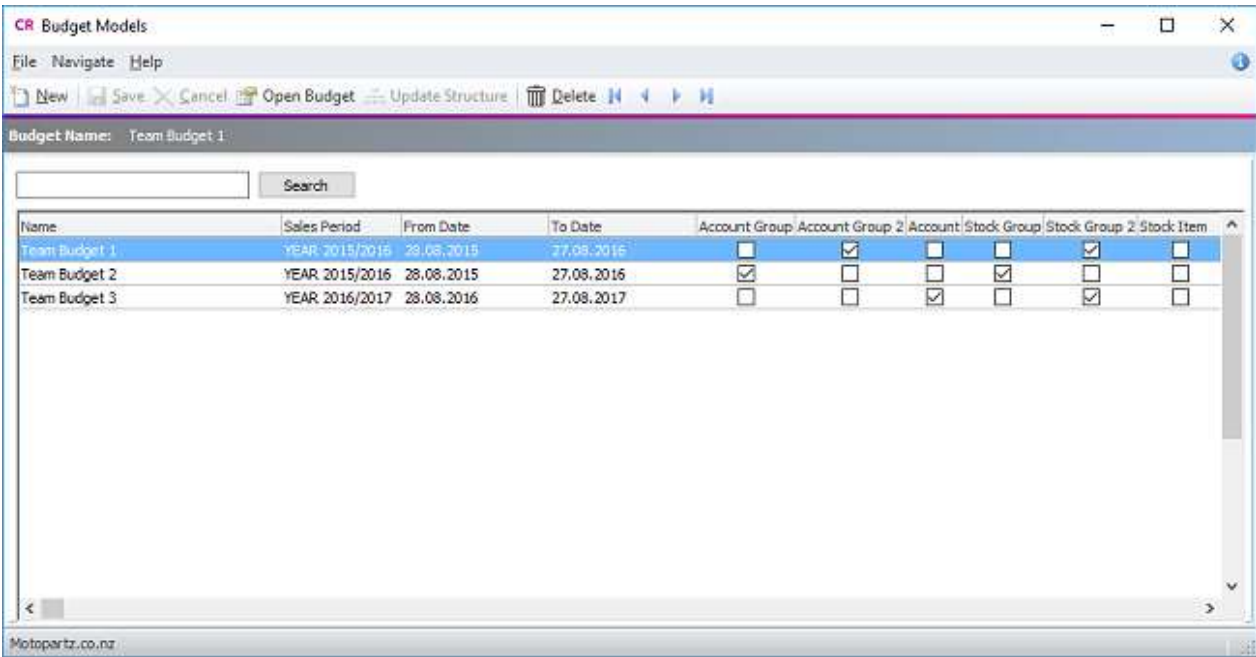
Click **New** to create a model:
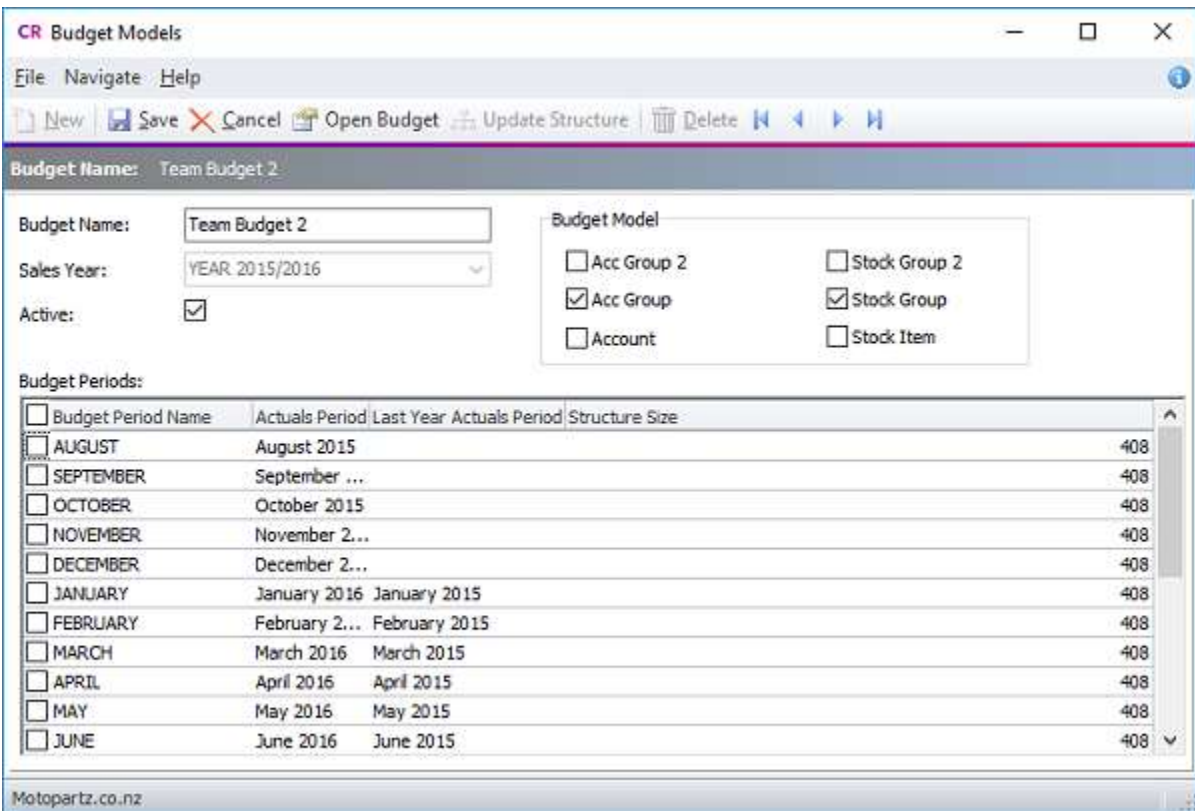
1. Enter a name for the model.

2. Select a Sales Year to create budgets for. Choose from the sales years set up set up in Exo Business Configurator under **Admin > Analytics > Setup Sales Year**.

3. Specify whether or not the budget is currently active by selecting or clearing the **Active** checkbox.

4. Select the levels to create budgets at by selecting options in the **Budget Model** section.

Select only one option for each column. Selecting the option for one level selects all levels above it. For example, selecting to budget by *Account Group* also creates budgets for *Account Group 2*.

You don't need to select an option from both columns. You can, for example, budget by *Stock Group* only.

5. Click **Save** to save the budget model.

Creating and Editing Budgets

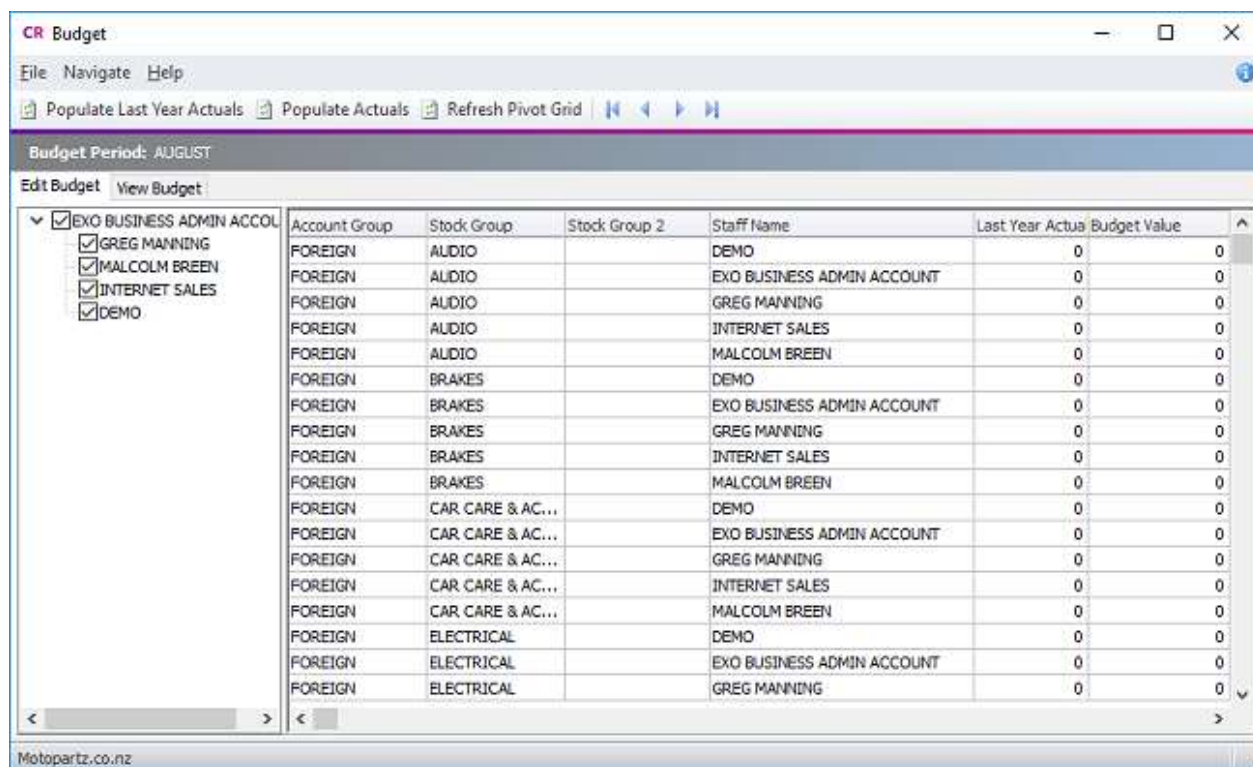Once all budget models have been set up, click the **Update Structure** button in the Budget Models window to generate the budgets.

Select a budget and click the **Open Budget** button. The Budget window displays:

All users who report to the current user (directly or indirectly) are displayed in a hierarchy on the left of the window. Select the options for all users to edit budgets for.

Enter budget information into the **Last Year Actuals** and **Budget Value** columns. Clicking the **Populate Last Year Actuals** or **Populate Actuals** buttons fills in the values in the **Last Year Actuals** columns with data from the database.

You can view budget data in a pivot grid on the **View Budget** tab. Click the **Refresh Pivot Grid** button to refresh the grid contents after editing budget figures.

You can enter budget figures can be into this window, or copy and paste them into Microsoft Excel. Right click on the column headings and select **Copy to clipboard** or **Paste from clipboard** to copy and paste data.

> **Note:** You can edit the data that you copy to Microsoft Excel. To paste data back into Exo Business CRM, the SEQNO column must remain the first column in the spreadsheet.

Campaigns

You can set up and run marketing campaign Exo Business CRM.

Viewing Campaigns

The Campaign Search view in Exo Business CRM lists all campaigns in Exo Business. Double click on a campaign to edit it.
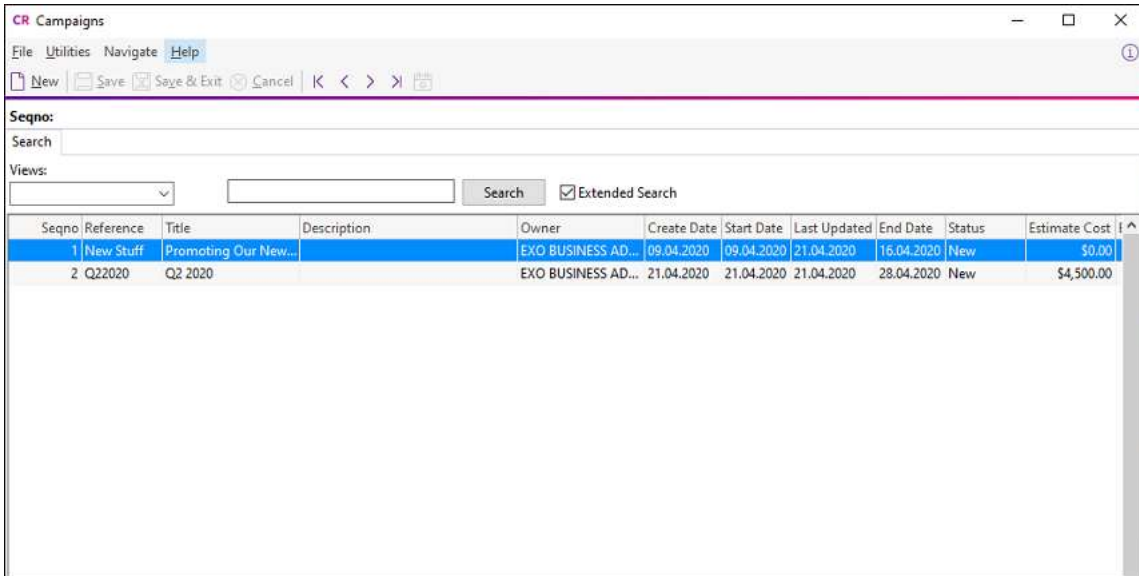
The Campaign Search view is either a separate window or a Dashboard widget that you can add to the Exo Business CRM interface.

Creating Campaigns

To create a campaign, click the **New** button in the Campaign Search window.
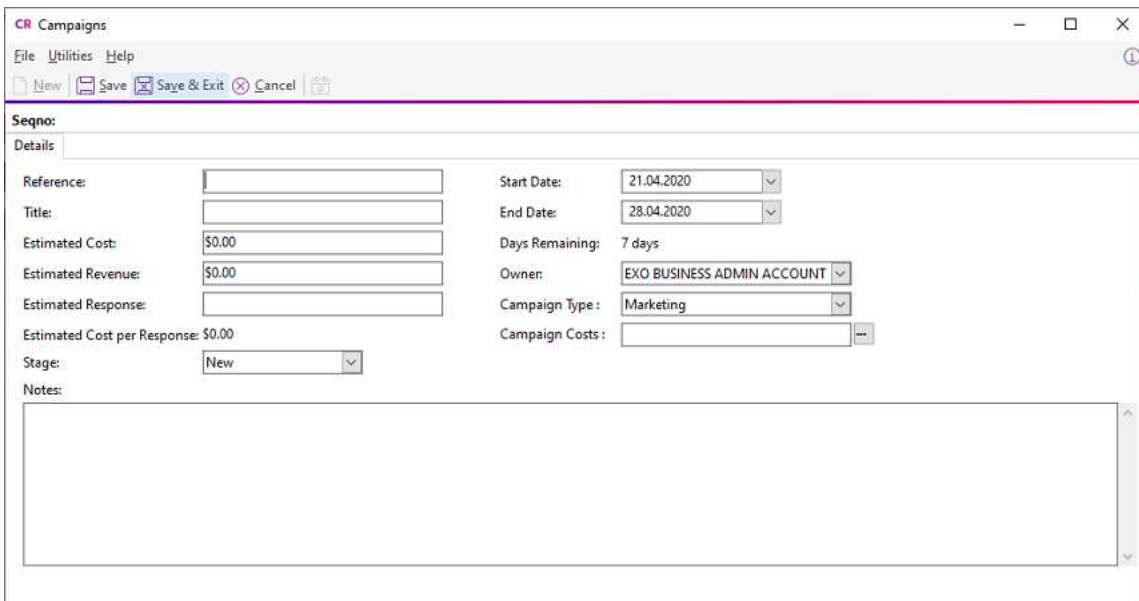
These are the fields on the **Details** tab:

Field	Description
Reference	A short reference code to identify the campaign.

Title	A descriptive name for the campaign.
Estimated Cost	The estimated costs of the campaign. For more advanced costing, use the Exo Job Costing module and associate the campaign with a job using the **Campaign Costs** property.
Estimated Revenue	The revenue that you estimate the campaign will generate.
Estimated Response	The estimated number of respondents for the campaign.
Estimated Cost per Response	The value in this field is calculated automatically based on the values of the **Estimated Cost** and **Estimated Response** fields.
Stage	The progress of the campaign from creation to completion: • New • In Progress • Postponed • Cancelled • Completed You can add and set up stages by selecting **Setup Campaign Stages** from the **Setup** menu.
Notes	Additional information about the campaign.
Start Date End Date	Use the start and end dates to specify the period over which the campaign runs.
Days Remaining	This field is calculated based on the start and end dates, and displays how much longer the campaign has to run.
Owner	The Exo Business staff member who is responsible for the campaign.
Campaign Type	Select either **Marketing** or **Non-Marketing** from the list. Contact who who have opted out of marketing communications (by selecting the **Opt-Out eMarketing** option in the Contacts window) are excluded from campaigns that are set as **Marketing**.
Campaign Costs	This field is enabled if the Exo Job Costing module is installed. This field specifies costs for this campaign. **Note:** Use the **Campaign Wave** field on jobs to indicate that the job was raised as a result of a campaign wave, not that it contains costs for a campaign.

Extra fields that you have set up display under the Notes section.

These tabs display on the **Details** tab when you save a campaign:

- **Activities** - this tab displays all activities for the campaign.

- **Contact Lists** - this tab displays all Contact Lists associated with the campaign. You can create Contact Lists and add them to the campaign on this tab.

- **Waves** - use this tab to set up and process the communication waves that make up the campaign.

- **History Notes** - this tab displays all history notes for the campaign.

- **Transactions** - this tab displays all transactions associated with the campaign.

- **Documents** - this tab displays documents related to the campaign.

- **Analysis** - this tab contains a dashboard interface with widgets that display analysis information about the campaign.

Communication Waves

You can separate campaigns into communication *waves* that you can process, one after the another, as the campaign progresses. The **Waves** tab on the Campaigns window displays the actions planned for a campaign.

Setting up Campaign Waves

To create a campaign wave, click the **Create New Wave** button on the toolbar of the Campaigns window.

Fill in the details of the campaign wave:

Field	Description
Campaign Ref	The title of the campaign that the wave is a part of.
Description	A description of the wave.
Communication Method	The action that this wave performs: • **Mailshot Process** - send bulk communications to selected Contact Lists using the mailshot function. • **Bulk Activity Creation** - create Tasks or Appointments related to all members of selected Contact Lists. • **Execute SQL** - execute a custom SQL query against selected Contact Lists. • **Social Media Post** - post to the company social media networks.

- **Export List** - export the details of selected Contact Lists to a CSV file.

- **Execute External Program** - run an external file or program.

> **Note:** You can hide communication methods using the **Hide Campaign Wave Communication types** User-level profile setting. If any of the methods listed above do not appear, check this profile setting.

Target Contact Lists	Select the Contact List(s) that the wave applies to. You can only select Contact Lists that appear on the campaign's **Contact Lists** tab.
Opt in URL **Opt out URL** **Landing Site** **Tracker Key**	These fields are enabled if **Mailshot Process** is the **Communication Method**. You can, for example, include one or more of them in the email template that this wave uses. **Note:** The values entered for these details are stored for each wave in the CAMPAIGN_WAVE table in the database.
Text	This field is enabled if **Social Media Post** is the **Communication Method**. Enter the text to send to social media network(s).
Start Date **End Date**	Enter the date range over which this campaign wave runs.
Processed **Complete**	Select these options to indicate the status of the campaign wave. When the wave is processed, the **Processed** flag is selected.

Processing Campaign Waves

Campaign waves are processed in different ways, depending on the **Communication Method** that you select.

You can follow up campaign waves after they have been processed.

When processing a campaign wave that uses all communication methods except for **Social Media Post**, you can regenerate the contact lists based on their list building criteria. Doing this captures changes to Contacts that have been made since the list was last generated.

> **Note:** This option does not appear with lists that do not use the list building criteria – for example, lists in which all Contacts were added manually.

Mailshot Process

Click the **Mailshot** button to start the mailshot process for all Contact Lists selected in the **Target Contact Lists** field.

Contacts in the target Contact List which have the **Opt-Out eMarketing** option selected are highlighted in grey, and are not included in the communication. This only happens for campaigns with the **Campaign Type** property set to *Marketing*.
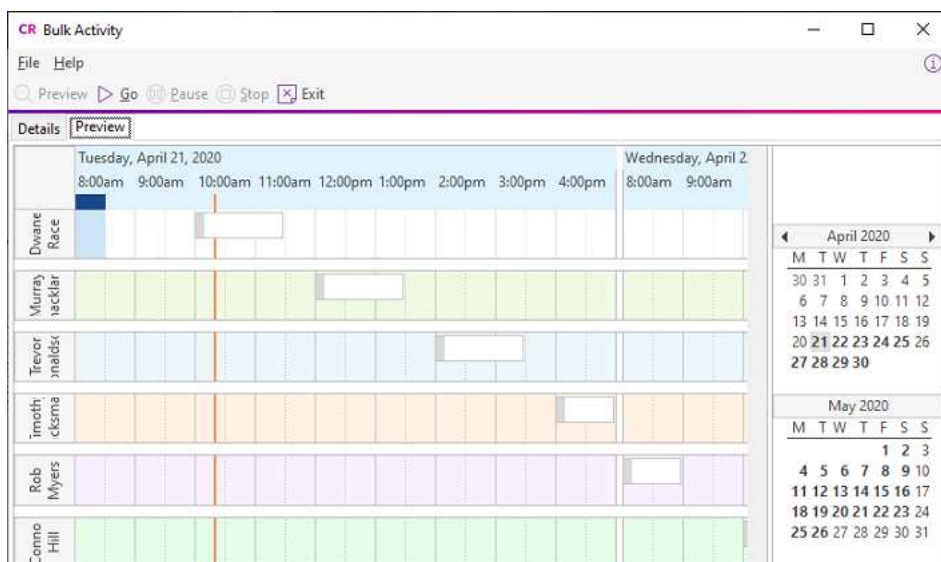
Bulk Activity Creation

Click the **Bulk Activity** button to open a window in which you can enter a SQL query to run against all Contact Lists selected in the **Target Contact Lists** field:
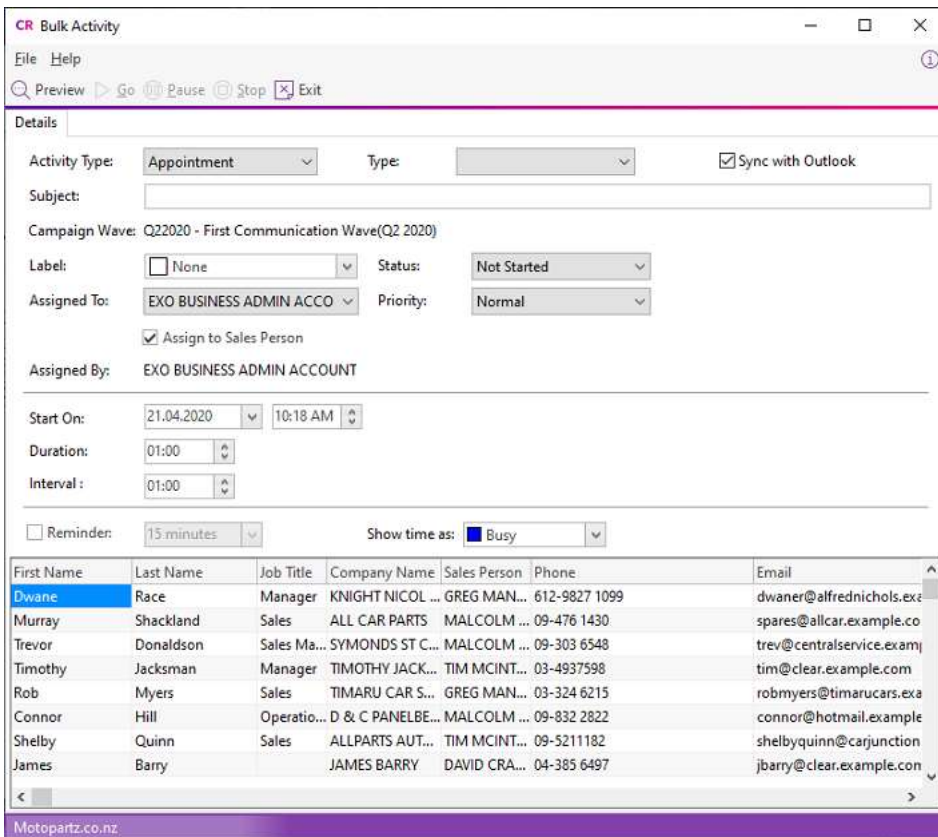
| Field	Description
Assign to Sales Person	Select this option to assign each appointment to the Sales Person associated with the Contact. If no Sales Person is specified, the appointment is assigned to the staff member specified in the **Assign To** dropdown.
Start On	Enter the date and time at which to start the first activity in the sequence.
Duration	Enter how long each activity should last.
Interval	Enter the amount of time between the end of one activity and the start of the next activity.

Click **Preview**. The **Preview** tab displays a schedule of all proposed activities:

If the schedule is correct, click **Go** to create all activities.

Execute SQL

Click the **Execute SQL** button to open a window in which you can enter a SQL query to run against all Contact Lists selected in the **Target Contact Lists** field:
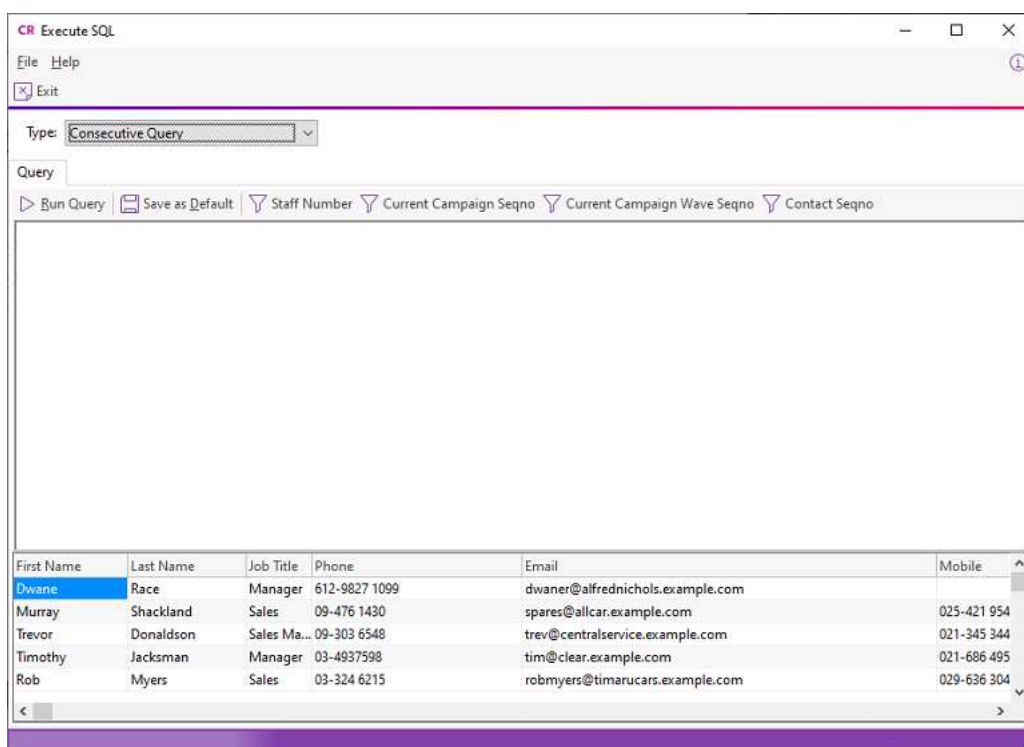
Select the type of query to run:

- **Concurrent** - the query applies to the entire Contact List in one operation.
- **Consecutive** - the query applies to each contact in the list in turn. When you select this option, the details of all members of the selected Contact List(s) display in the bottom pane of the window.

Enter the SQL query into the main area of the window, then click **Run Manual Query** to apply the query.

Social Media Post

Enter text for the social media post into the **Text** field, then click one or more of these toolbar buttons to post the text to the relevant social media network(s):

- Facebook Post
- LinkedIn Activity
- Tweet Status

The accounts posted to are set up in Exo Business Configurator under **Admin > Social Media > Setup Social Media**. The account details used to post with are configured on the Setup Social Media screen.

Export List

Click the **Export List** button to open this window:
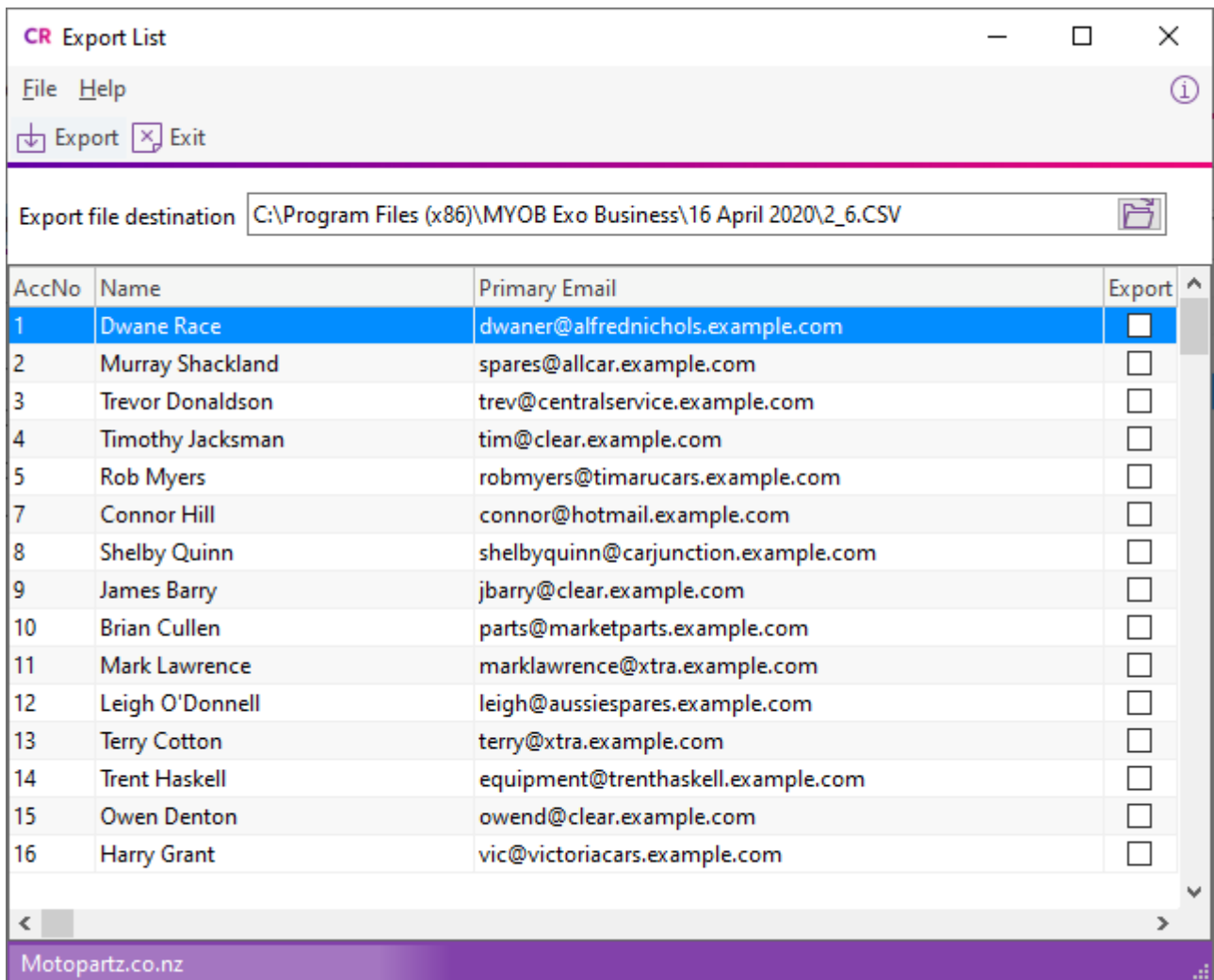
All Contacts from the list(s) specified in the **Target Contact Lists** field display in the grid. Select the **Export** box for all Contacts whose details to export. Right click on the column headers and choose **Select visible columns** to select the columns to export. All visible grid columns, except the **Export** column, export to a CSV file.

Enter the name of the CSV file to export to, then click **Export**. You can use the exported CSV file in third-party applications — for example, a bulk mailing system.

Contacts in the target Contact List which have the **Opt-Out eMarketing** option selected are highlighted in grey, and are not included in the communication. This only happens for campaigns with the **Campaign Type** property set to *Marketing*.

Execute External Program

Click the **Execute External Program** button to open this window:
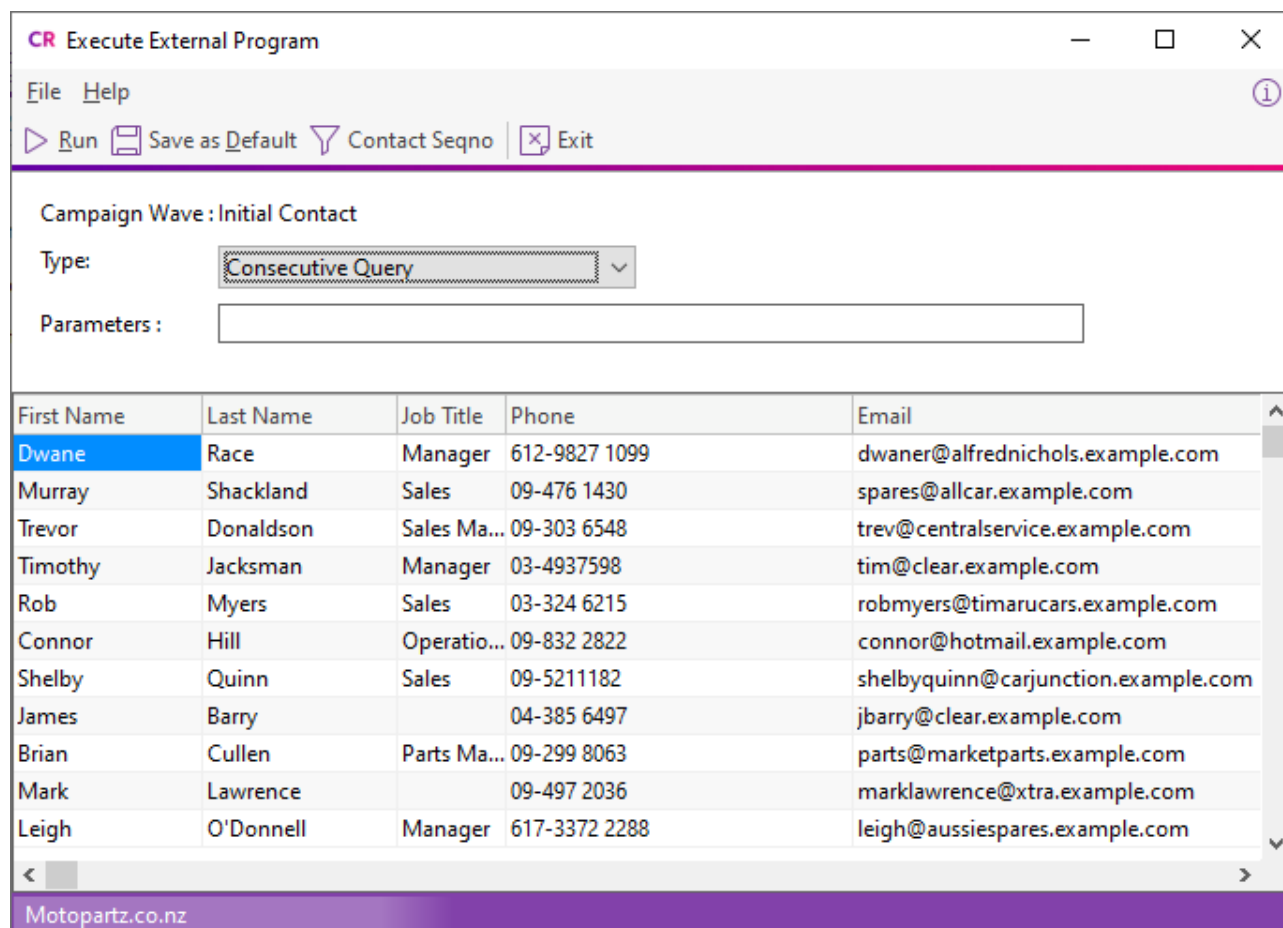
Select one of these options from the **Type** list to run the program:

- **Concurrent Query** - the program is run once for the entire Contact List.
- **Consecutive Query** - the program is run for each Contact in the list in turn. When this option is selected, the details of all members of the selected Contact List(s) appear in the bottom pane of the window.

Enter the name of the file or executable to run and any additional parameters into the **Parameters** field.

To run an external program, enter

"MyProg.EXE <LOGIN> <CURRENT>"

Where *<LOGIN>* passes the database connection details, *<CURRENT>* passes the campaign wave SEQNO in **Concurrent** mode, and each Contact's SEQNO in **Consecutive** mode.

> **Note:** Clicking the **Campaign Wave Seqno** or **Contact Seqno** toolbar button adds the *<CURRENT>* parameter to the end of the parameter string.

Enter a parameter with the extension .CLR to run Clarity.

Click **Run** to run the file or executable.

Following up Campaign Waves

Exo Business records when and how campaign waves are processed. You can use the information when following up on a wave after it has been processed.

When a campaign wave is processed, a History Note is added to the campaign's **History Notes** tab and to the **History Notes** tabs for each Contact when you use one of these communication methods:

- Execute SQL
- Export List
- Execute External Program

If you select the **Save copy of sent email** option in the Mailshot window, Exo Business creates a History Note for each Contact that the mailshot was sent to. A copy of the email is saved to the **Documents** tab on each contact's record.

The CAMPAIGN_WAVE_AUDIT database table contains a record of which Contacts each campaign wave was sent to. Exo Business creates an audit log for these communication methods:

- Mailshot Process
- Execute SQL
- Export List
- Execute External Program

Campaign Transactions

When Exo Business CRM is installed, the **Campaign Wave** field is enabled in these windows:

- Sales Orders
- Purchase Orders
- Debtor Invoices
- Non Accounts
- Opportunities
- Activities
- Jobs (Exo Job Costing module)

Use this field to associate all transactions for a campaign with a campaign wave. The campaign wave is copied from transaction to transaction — for example, when converting an Opportunity to a Sales Order or a job.

> **Note:** You can use the **Track Campaigns On Transactions** Company-level profile setting to enable or disable the **Campaign Wave** field.

The **Transactions** tab in the Campaigns window is a dashboard containing widgets that display all transactions that have been assigned to the currently-selected campaign. There are widgets for Invoices, Sales Orders, Jobs, Opportunities, and Purchase Orders.

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