



AimHigh CRM 3.1

What's New

Table of Contents

Getting Started

Introduction to AimHigh CRM 3.1	3
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What's New in AimHigh CRM 3.1

Managing Campaigns	4
Work with Campaigns	4
Work with Dashboard	5
Work with marketing lists	8
Add members to a marketing list	9
Managing Leads	10
Qualify and convert leads to accounts, or contacts	11
Managing Opportunities	12
Qualify Opportunities	13

Settings

Planning SMTP	14
Work with SMTP Lists	14

Getting Started

Introduction to AimHigh CRM 3.1

At AimHigh CRM, our vision is to help our customers deliver the kinds of amazing customer experiences that will help their business thrive. We believe that there has traditionally been a chasm between marketing and sales that needs to be bridged in order to truly deliver personalized, end-to-end experiences that customers will love. In a world where sellers and marketers must work more closely together to seamlessly and successfully engage customers, AimHigh is providing the solutions that can enable them to deliver amazing customer experiences together. By aligning your organization around what matters most, companies will be able to drive greater success and engagement with their customers.

In this content...

What's New in AimHigh CRM 3.1

- Managing Campaigns.
- Convert Leads.
- Qualify Opportunities.
- SMTP Settings.

Marketing

Planning Campaigns

Campaigns are containers for all of the information, campaign activities you need to manage for the marketing campaigns.

Work with Campaigns

Can I do this task?

This task requires permissions that are found in all default marketing security roles.

The only difference between campaigns and campaign templates is in how you save the record. You can add planning tasks, campaign activities, marketing lists, sales literature, and products to both campaigns and campaign templates. Use a campaign to plan and track each of your marketing campaigns.

Create or edit a campaign

- 1- In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
- 2- In the Grid View group, click **New**.
- 3- Under **Information**, enter the information that you have for this campaign.

Update Campaign Record

Indicates required field*

General Information For Campaign

Name: Ramadan Kareem

Code: 0000056

Status: Active

Type: Advertisement

Schedule Days

Friday Saturday Thursday Wednesday

Monday Sunday Tuesday

Start Date: 2015-06-16

Start Time: 10:00 AM

End Date: 2015-06-22

End Time: 6:30 PM

SMTP: Marketing

Header:

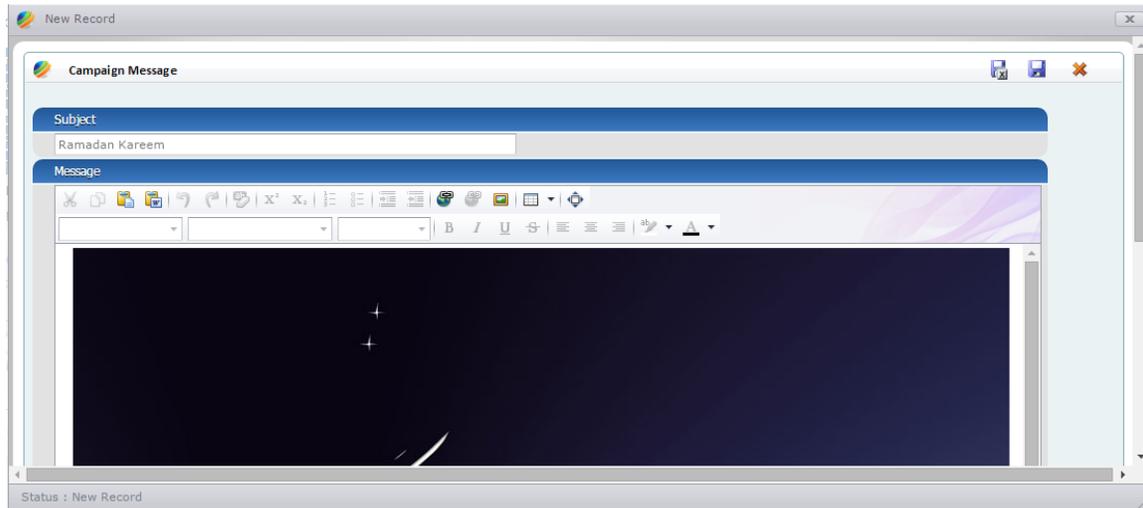
Footer:

Created By: Imohamed Created date: 2015-06-16 17:22:00

Modified By: Admin Modified date: 2015-06-17 17:55:29

- 4- Select days during which you want to send the campaign.
- 5- Select SMTP settings to use.

- 6- Create your message by clicking on the icon 



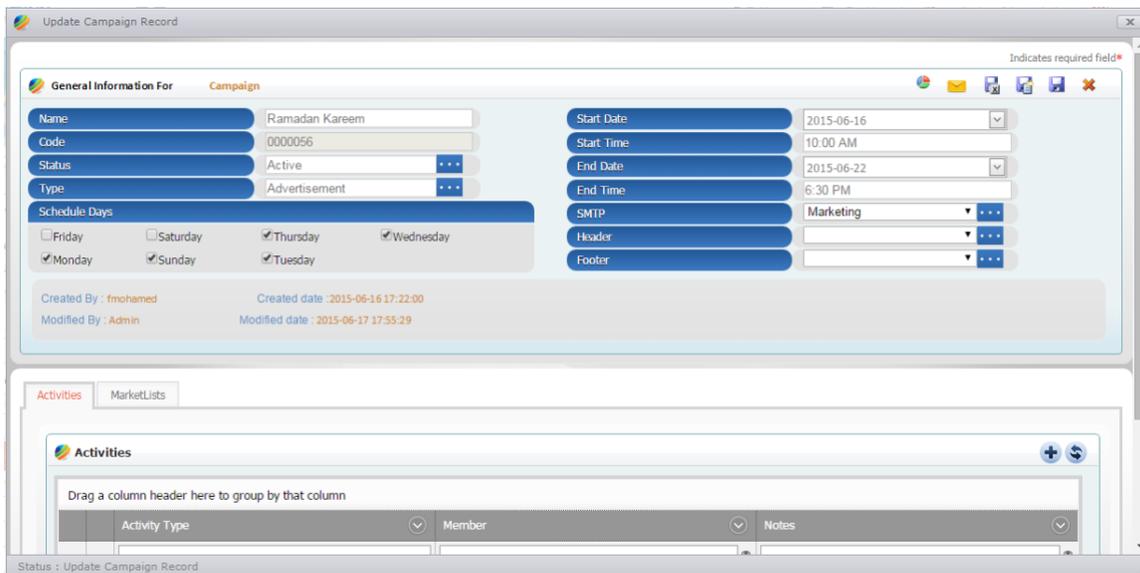
- 7- Click **Save** or **Save and Close**.

Work with campaign Dashboard

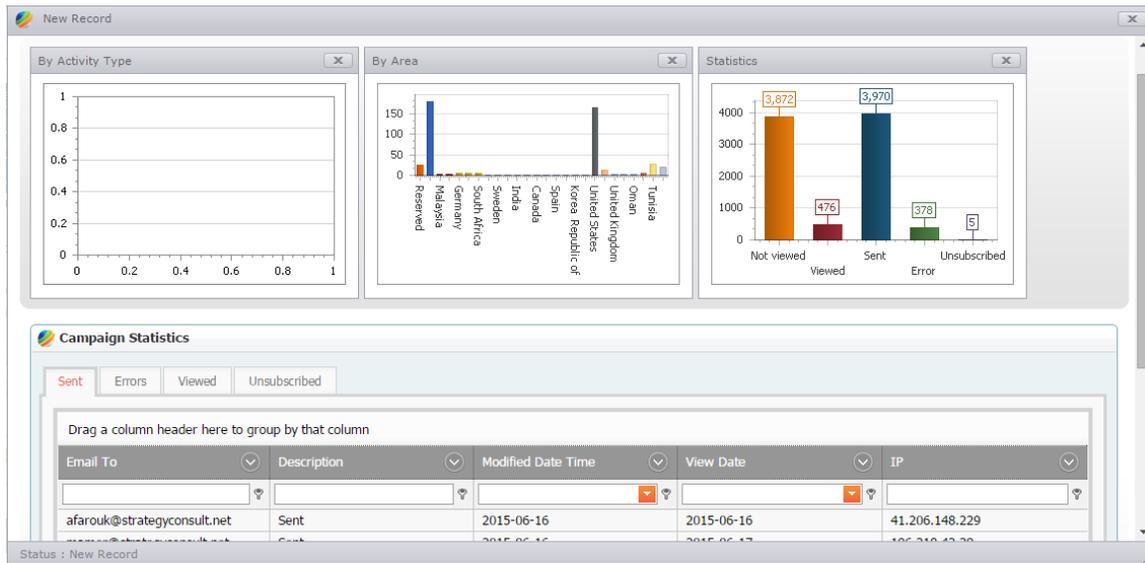
Can I do this task?

This task requires permissions that are found in all default marketing security roles.

- 1- Open campaign details.



2- To view the campaign dashboard click the icon 



By Area

Area	Count
Reserved	~10
Malaysia	~10
Germany	~10
South Africa	~10
Sweden	~10
India	~10
Canada	~10
Spain	~10
Korea Republic of	~10
United States	~150
United Kingdom	~150
Oman	~10
Turkia	~10

Statistics

Category	Count
Not viewed	3,872
Viewed	476
Sent	3,970
Error	378
Unsubscribed	5

Campaign Statistics

Sent | Errors | Viewed | Unsubscribed

Drag a column header here to group by that column

Email To	Description	Modified Date Time	View Date	IP
afarouk@strategyconsult.net	Sent	2015-06-16	2015-06-16	41.206.148.229
afarouk@strategyconsult.net	Sent	2015-06-16	2015-06-16	41.206.148.229

Status : New Record

Add a marketing list to a campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles.

After you create a campaign, add items that are associated with this campaign. You can add a target marketing list and activities.

1- In the Navigation Pane, click **Marketing**, and then click **Campaigns**.

Click the name of the campaign to which you want to add a list or activities, and then do one of the steps in the following table.

A marketing list	Under Campaigns , click Marketing Lists , and then in the Grid View , click Add Existing Marketing List .
Activities	Under Campaigns , click Activities , and then in the Grid View , click Add Activities .

Add Member To List

Selected values:
Archive
ITIL

Selected count: 2
Add Member(s)

Drag a column header here to group by that column

List Name	List Type
<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Archive	
<input checked="" type="checkbox"/> ITIL	
<input type="checkbox"/> AimHighCRM	
<input type="checkbox"/> AimHighService	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

[Create Filter](#)

Member
Activity Type
Notes

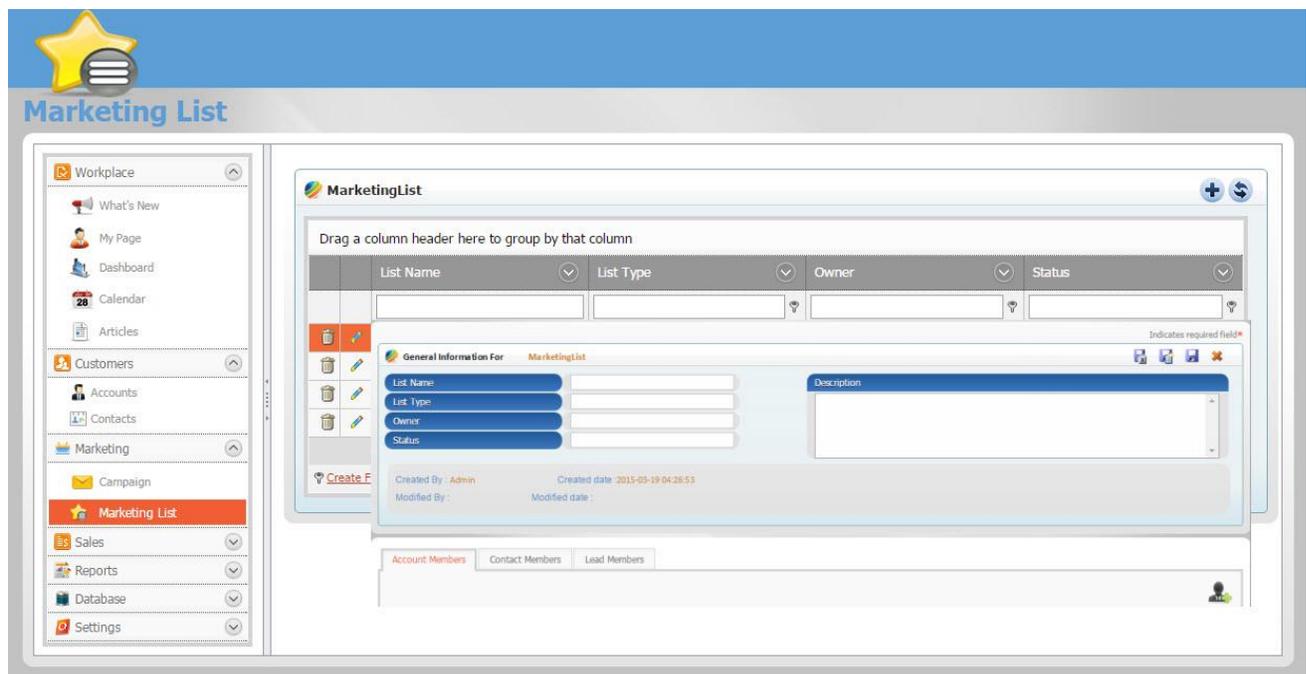
ID	Name
2	Task
5	Fax
6	In-Bound-Call
7	Out-Bound-Call
8	E-Mail
9	Letter
10	Appointment

Work with Marketing Lists

Marketing lists are lists of accounts, contacts, or leads that match a specific set of criteria.

Create or edit a marketing list

- 1- In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
- 2- In the **Grid View** group, click **New**, or open the marketing list that you want to edit.
- 3- Under **Information**, specify the information in the following required boxes:
 - a- **Name**
 - b- **List Type**
- 4- Click **Save** or **Save and Close**.



Notes

After you create an empty marketing list, you must add marketing list members before you can use the list.

Add members to a marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles

- 1- In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
- 2- Open the marketing list to which you want to add members.
- 3- Click **Marketing List Members**.

The screenshot shows a 'New Record' dialog box. It has a title bar with a close button. The main area is divided into several sections: 'Field Text' (a list of fields), 'Field Value' (a text input field), 'Operators' (a list of operators and 'And'/'OR' buttons), and three buttons: 'Save', 'Check & Run', and 'Remove Filter'. Below these is an 'Expression Text' area with a large text input field. At the bottom, there is a 'Preview Data' section with two rows of text: 'Drag a column header here to group by that column' and 'Drag a column here...'. The status bar at the bottom left reads 'Status : New Record'.

- 4- Create your query (SQL like) to retrieve data from any of the following : Account – Contact – Lead. The query is dynamic and shall retrieve the new records when opened everytime.
- 5- Click **Check & Run** to check if this query valid or not, if valid click **Save**.

Tip

You can also add members to a marketing list from the Sales area. To do this, in the Navigation Pane, click **Marketing List**, and then click **Accounts**, **Contacts**, or **Leads**. Next, select the records you want to add to a marketing list, and click **Add to Marketing List**. Locate and select the marketing list you want to add the records to and then click **OK**.

Note

Based on the member type of the list to which you are adding records, a member can be an account, contact, or lead. For example, if you open a leads list, any you can add new leads to the member list, but you cannot add accounts or contacts.

Managing Leads

In AimHigh CRM, you can get lead information in the Sales area. All activities are logged and a running history of every activity with the lead is kept, once it is completed.

You can enter leads individually. In addition, you can use AimHigh CRM to import lead lists into the database, perform the common qualifying activities, and convert leads to opportunities, if they qualify.

Each disqualified lead is retained in the database for business-reporting purposes.

You can track information about prospective customers, and then qualify and assign inquiries. Because leads are tracked separately from customers throughout the sales cycle, you can focus on building your customer base.

Understanding How Accounts, Contacts, Leads, and Opportunities Relate

Account and contact records represent established customers. Leads are potential or prospective customers. Opportunities are not a specific customer, such as a lead, contact, or account, and therefore require a customer record to be added to the opportunity.

Work with Leads

Leads represent potential customers who have not yet been qualified by your sales process. As you qualify leads, you can convert them to other types of records.

Qualify and convert a lead to an account, contact

Can I do this task?

This task requires permissions that are found in all default security roles.

Turning leads into customers, or at least opportunities, is the goal of any organization. After you qualify a lead based on the metrics used by your organization, use AimHigh CRM to create

up to three new records quickly in which the lead is represented as an account, contact, or opportunity.

Only one lead at a time can be converted.

- 1- In the Navigation Pane, click **Sales**, and then click **Leads**.
- 2- In the list of leads, open the lead you want to qualify and convert.
- 3- On the **Lead** tab, click  **Convert**.
- 4- In the **Convert Lead** dialog box, **Qualify and convert into the following records** is selected by default. Select one or more of the following:

Account

Select this check box to create an account record. Do this if there is an actual company with which you are doing business.

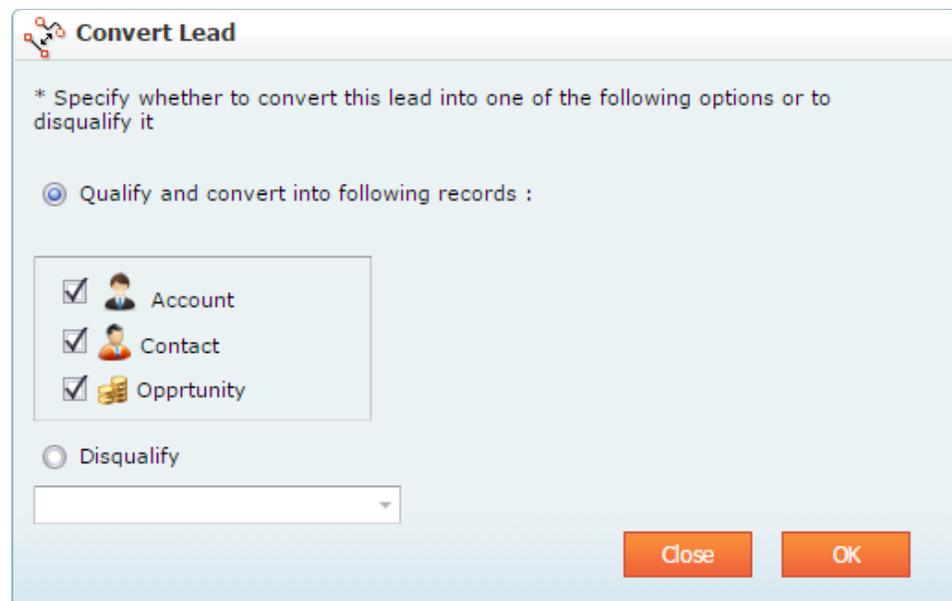
Contact

Select this check box to create a contact record. Do this if you are doing business with a specific individual at a company or just an individual customer (consumer).

Opportunity

Select this check box to create an opportunity record. If this is the only option you select, then in the **Customer** box, you must associate an account with the lead.

Click **OK**.



Convert Lead

* Specify whether to convert this lead into one of the following options or to disqualify it

Qualify and convert into following records :

 Account

 Contact

 Opportunity

Disqualify

Close OK

Notes

- Based on the security privileges assigned to your user account, you might not be able to qualify leads that you do not own. If you have to qualify them, you must have the necessary privileges. Also, regardless of who qualifies the lead and performs the

conversion, all the newly created records are, by default, owned by the user who owned the original lead.

- Any notes on a lead record do not transfer to the new account, contact, or opportunity record. The notes remain with the originating lead record.
- When you convert a lead, the new record that is created will not be checked to see if it is a duplicate.

Managing Opportunities

An opportunity is a potential sale, which is similar to a lead. However, the subtle difference is that with an opportunity you can forecast sales revenue, set a potential close date, and factor in a probability for the sale to occur.

Qualify an opportunity

Can I do this task?

- 1- In the Navigation Pane, click **Sales**, and then click **opportunity**.
- 2- In the list of opportunities, open the opportunity you want to qualify.
- 3- In qualify tab, you select a value from the dropdown list to qualify the opportunity, and the equivalent rate is calculated:
 - a- BUDGET (Do you have budget allocated for this business need)?
 - 1 = likely to have some budget soon
 - 2 = have some budget, but not sufficient
 - 3 = have budget that may be just right
 - 4 = have sufficient budget
 - b- AUTHORITY (which of the following best describes your influence on the purchase decision)?
 - 1 = I have no authority, but have direct access to the decision maker(s).
 - 2 = I influence the decisions and have access to the decision maker(s).
 - 3 = I am one of several decision makers.
 - 4 = I have complete authority as the sole decision maker.
 - c- NEED (do you have current business need for xxx solution)?
 - 1 = likely.
 - 2 = I definitely have the need. This product/project has potential to help.
 - 3 = I definitely have the need. This product is one of several that can help.
 - 4 = I definitely have the need. This is one of the very few products I'm looking at and will help.
 - d- TIME (what timeframe are you working with to solve this problem)?

- 1 = 12 months+.
- 2 = 7-12 Months.
- 3 = 3-6 months.
- 4 = 0-3 months.

- e- Overall Rating will be between 0 to 16
 - 0-4 = Unqualified (don't waste your time)
 - 5-8 = Slightly Qualified (nurture it)
 - 9-12 = Qualified (Follow up)
 - 13-16 = Highly Qualified (Follow up immediately).

Orders Attachments **Qualify**

Qualify Opportunity

BUDGET (Do you have budget allocated for this business need?)
Likely to have some budget soon

AUTHORITY (which of the following best describes your influence on the purchase decision?)
I have no authority and no access to the decision maker(s).

NEED (do you have current business need for xxx solution?)
I definitely have the need. This product/project has potential to help.

TIME (what timeframe are you working with to solve this problem?)
12 months+.

Unqualified (don't waste your time).

Qualify

Value: 4.00

16.0
12.0
8.0
4.0
0.0

Work with SMTP

SMTP settings are used to send email messages from marketing campaigns from inside AimHigh CRM

Can I do this task?

This task requires permissions that are found in all default security roles.

1- In the Navigation Pane, click **Settings**, and then click **SMTP**.

The screenshot shows the 'SMTP Settings' configuration window. It contains a form with the following fields:

- Smt User: [Text Input]
- Smt Server: [Text Input]
- Smt Is SSL:
- Enabled:
- Name: [Text Input]
- Maximum Smt Mails Per Day: [Text Input]
- Smt Password: [Text Input]
- Smt Port: [Text Input]
- Smt From: [Text Input]
- Is Default Smt?:
- Display Name: [Text Input]
- Maximum Smt User Mails Per Hour: [Text Input]

At the bottom right of the form are 'Update' and 'Cancel' buttons. Below the form is a table of existing SMTP accounts:

#	Smt User	Smt Server	Smt Port	Smt Is SSL	Smt From	Enabled	Is Default Smt?	Name
Edit New Delete	SCINewsletter@strategyconsult.net	ahmad45.webhost4life.com	587	<input type="checkbox"/>	Marketing@strategyconsult.net	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Marketing
Edit New Delete	archive-it@strategyconsult.net	ahmad45.webhost4life.com	587	<input checked="" type="checkbox"/>	archive-it@strategyconsult.net	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	archive-it

You may add multi SMTP account settings to use with campaigns.