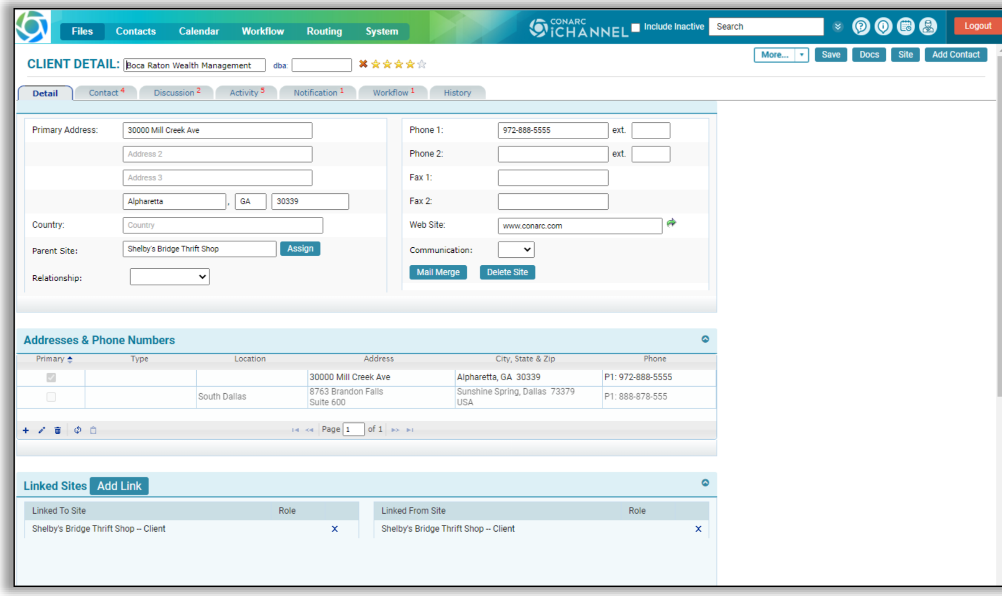
iChannel CRM

IC-300

iChannel CRM

iChannel **CRM (Contact Relationship Manager)** tool provides your Organization with a central contact management database allowing users to efficiently manage client relationships, vendors, employees, and interactions users have with their clients.

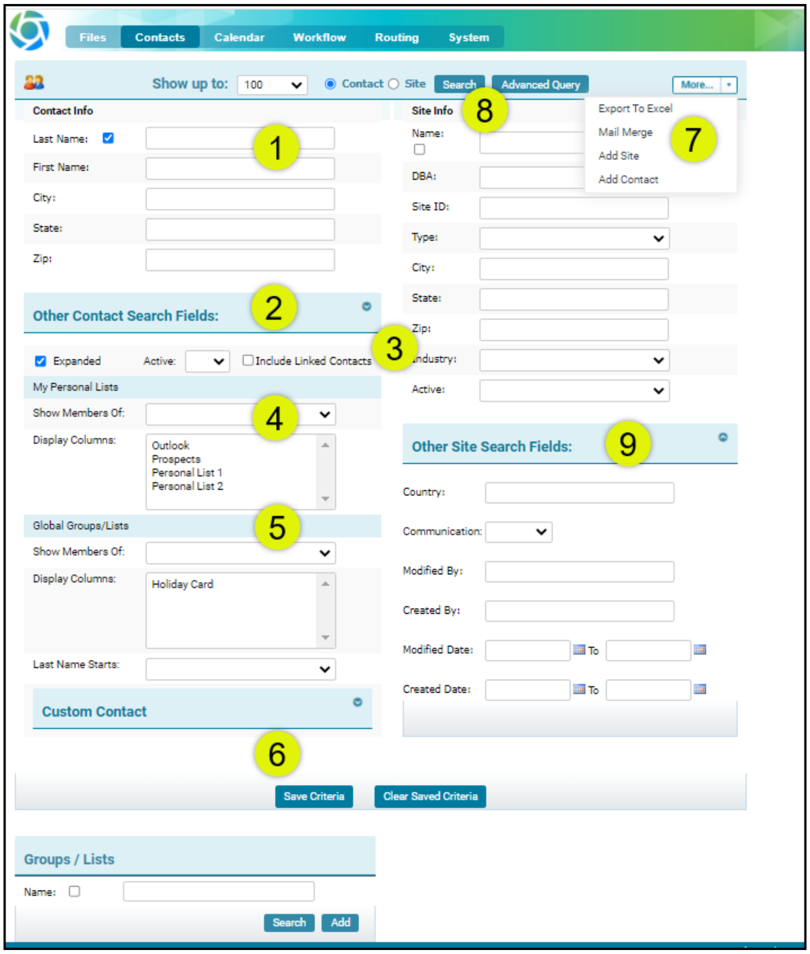


In this module, **CRM**, the following topics will be reviewed in detail:

- Contact Search Screen
- How to Search a Contact or Site
- Add a Site (CRM Only)
- Add a Site (CRM & File Management Area)
- Site Detail Screen Overview
    - Contacts Tab: Add a Contact | Duplicate Contact
    - Discussion Tab
    - Activity Tab
    - Notification Tab
    - Workflow Tab
    - History Tab
- How to Create a Contact
- How to Identify and Resolve a Duplicate Contact
- How to Link a Contact
- How to Update a Contact
- How to Add a Group Group/List

Contact Search Screen

From the **iChannel Dashboard Banner**, select **Contacts** link to open the Contact Search Screen. From this screen, users have the ability to perform complex searches on your contacts or sites.



CRM: Contact Search Screen

CRM – How to Search for a Contact | Site	
Step	**Action**
1	**Contact Info** • *Search* for a contact by **Last** | **First** |**City** | **State** or **ZIP** • *Click* the **Search** button to return results.
2	**Other Contact Search Fields (UDF – User Defined Fields)** • These fields are unique to your organization and are optional. • An organization can have up to 15 UDF fields. • Contact your System IT Administrator if you need to have customized UDF fields.
3	**Search Result Options** • **Expanded** – Displays the address information in the search results. • **Inactive** – Includes inactive contacts in the search results.

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<tr><td></td><td>

- **Linked Contacts** – Includes any linked contacts in the search results when performing an Site search.

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My Personal List – Allows each user to create a custom list of contacts. The Outlook list is used to Sync with Microsoft Outlook.

- **Show Members Of** – this drop-down list to display the contacts that are in the selected group.
- **Display Columns** – allows you to choose the columns you would like displayed in the search results quickly add/remove contracts from the selected list.

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Global Groups | Lists – these search settings correspond to the groups in the Group | Lists section list.

- **Show Members of drop-down list** – display the contacts that are in the selected group(s).

Display column – allows users to choose the columns you would like displayed in the search results to quickly add/remove contacts from the selected list.

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Save Search Criteria

- *Click* the **Save Criteria** button at the bottom of the screen to save the search fields on the screen. This is helpful if you will being search for the same fields over and over.

Click the **Clear Criteria** button to clear any saved search criteria.

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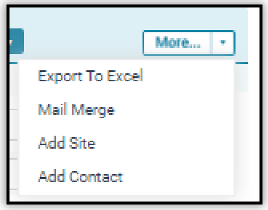
More drop-down list – your System IT Administrator will determine if the user has access to any of the items in the list.

- **Export to Excel**
- **Mail Merge**
- **Add Site**
- **Add Contact**



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Site Info

- *Search* for a Site by **Name | DBA | ID | Type | City | State | ZIP | Industry | Active**
- *Click* the **Search** button to return results.

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Other Site Search Fields

- These fields are unique to your organization and are optional.

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CRM: How to Search for a Contact

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<tr><th colspan="2">CRM – How to Search for a Contact</th></tr>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

In the Contact Info, Other Contact Search Fields, Search Results Options, My Personal List, Global Groups | List fields, enter as much or as little information to perform the contact search.

- *Click* the **Search** button to return results.

The **Contact Search Result** window will display.

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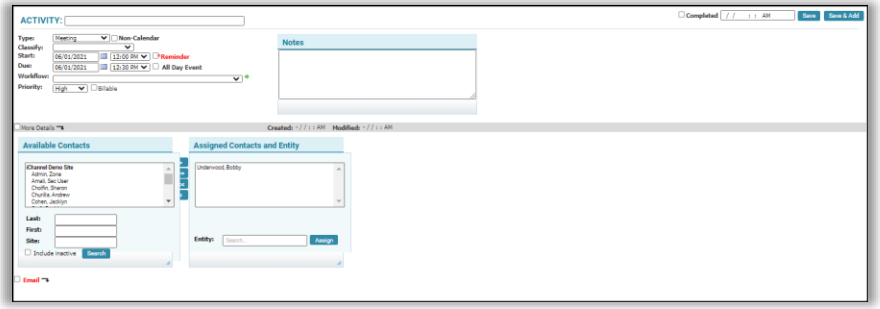
Details

1. **File Area** – next to the contact name, *click* the icon to navigate to the File Area for the Site.
2. **Contact Name** – *click* the **contact's name link** to access the contacts personal details page.
   Contact Email – *click* the **email address** link for the contact to start an email for the selected contact.
3. **Site Name** – *click* the **site link** to access the site details page.
4. **Email Selected Contacts** – *select* the contacts (checkbox) you would like to start an email, *select* **Email Selected Contacts** button.
5. **Calendar Activity** – *click* the **Create Activity** button. The Activity page will display. Fill out the information using the fields to create the Activity type for that contact selected.



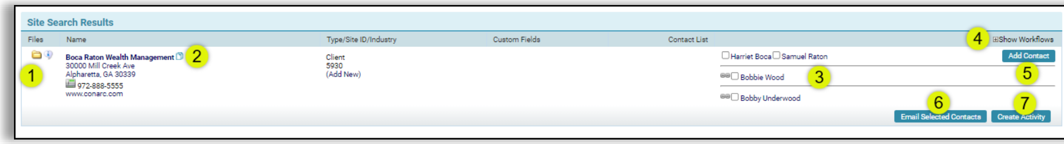
- **Name** – *enter* the **Name** of the Activity (Portal Request).
- **Type** – *by default*, **Meeting** will populate in the **Type** field. Use the drop-down list to change the type.
- **(Optional) Classify** – *select*, if applicable, a **Class** type from the drop-down list.
- **Start | End Date** – *select* the **Date Icon** to enter the start date and end date for the requested Activity. If the activity is an all-day type, *select* **All Day Event checkbox**.
- **Workflow** – if the activity is associated with a workflow, use the drop-down list to search for Workflow.
- **Priority** – use the drop-down list to select the priority for the activity.
- **Notes** – enter any additional notes related to the Activity.
- **Available Contacts – Assigned Contacts and Site**
    - From the **Available Contacts** list *select* a **contact(s)** to add to **the Assigned Contacts and Site**.
    - TIP: You can *double-click* a **contact** to move contacts between the Available and Assigned windows.
- **Search for Contact | Site**: *enter information* in the **Last | First | Site** fields to **search** for a contact | site.
- **Email** – check the email box to send an email to an Internal User or add Internal notes in the available field.
- **Completed** – by *selecting* the **Completed checkbox**, the current date | time will automatically populate.
- *Click* Save | Save & Add.

CRM: How to Search for a Site

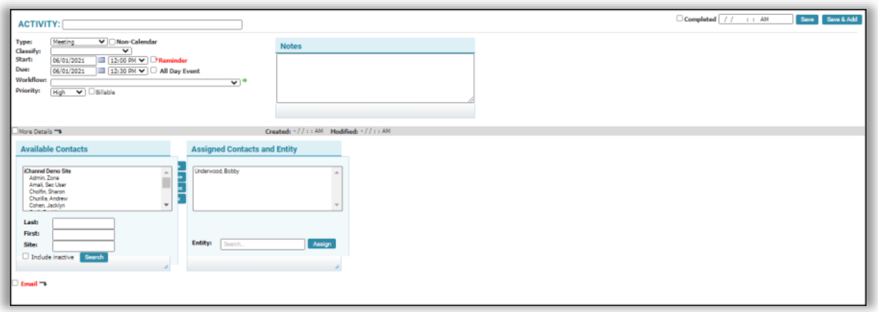
CRM – How to Search for a Site

Step	Action
1	*Select* **Contacts** from the banner. *Select* the **Site radio option**. In the Name, DBA, ID, Type, City, State, ZIP, Industry, Active fields, enter as much or as little information to perform the site search. *Click* the **Search** button to return results.

The **Site Search Results** window will display.



1. **File Area** – next to the site name, *click* the icon to navigate to the File Area for the Site.
2. **Site Name** – *click* the **site link** to access the site details page.
3. **Contact Name** – *click* the **contact name link** for the contact to navigate to the Contact Detail info page.
4. **Show Workflows** – *click* the "plus sign" to show any workflows associated to the site.
5. **Add Contact** – *click* the **Add Contact** to add another contact to the site.
6. **Email Selected Contacts** – *select* the contacts (checkbox) you would like to start an email, *select* **Email Selected Contacts** button.
7. **Calendar Activity** – *click* the **Create Activity** button. The Activity page will display. Fill out the information using the fields to create the Activity type for that contact selected.



Details

- **Name** – *enter* the **Name** of the Activity (Portal Request).
- **Type** – *by default*, **Meeting** will populate in the **Type** field. Use the drop-down list to change the type.
- **(Optional) Classify** – *select*, if applicable, a **Class** type from the drop-down list.
- **Start | End Date** – *select* the **Date Icon** to enter the start date and end date for the requested Activity. If the activity is an all-day type, *select* **All Day Event checkbox**.
- **Workflow** – if the activity is associated with a workflow, use the drop-down list to search for Workflow.
- **Priority** – use the drop-down list to select the priority for the activity.
- **Notes** – enter any additional notes related to the Activity.
- **Available Contacts – Assigned Contacts and Site**

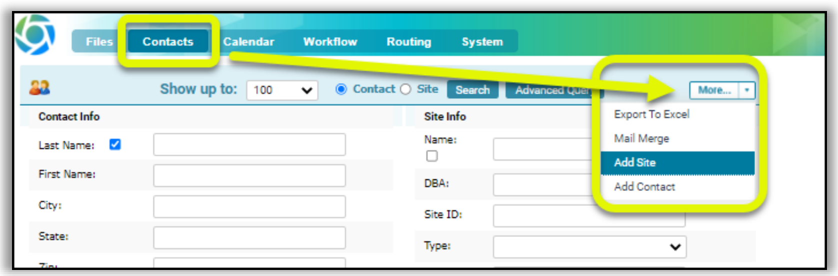
	○ From the **Available Contacts** list *select* a **contact(s)** to add to **the Assigned Contacts and Site**. ○ TIP: You can *double-click* a **contact** to move contacts between the Available and Assigned windows. • **Search for Contact | Site**: *enter information* in the **Last | First | Site** fields to **search** for a contact | site. • **Email** – check the email box to send an email to an Internal User or add Internal notes in the available field. • **Completed** – by *selecting* the **Completed checkbox**, the current date | time will automatically populate. • *Click* Save | Save & Add.

CRM: How to Create a Site (CRM Only)

Use the **How to Create a Site (CRM Only)** when you have a new prospect or lead; yet you do not have a need to create a File Management Area. If your prospect or lead, develops into a Site where you'll need a File Management Area, you'll need to work with your System IT Administrator to *create* a **SITE** record for the client.

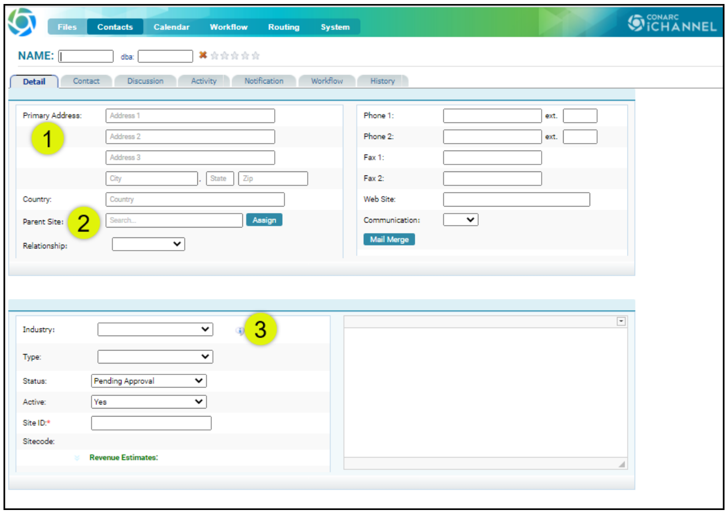
It is not uncommon that your System IT Administrator will create all Sites via an iChannel Interface; therefore, the How to Create a Site (CRM Only) is an optional feature one how to create manually.

Before adding a new Site, it is recommended that you search for the client's name to prevent creating a duplicate site. In addition, your organization might select to import Site's through an interface. Please contact your System IT Administrator before creating a new site.

CRM – How to Create a Site (CRM Only)	
Step	**Action**
1	*Select* **Contacts** from the banner. *Select* the **More...** drop-down button. *Select* **Add Site**. 

The Site **Name** window will display.

1. **Site Information** – Fill in as much information as necessary about the new Site.
2. **Parent Site** – if the new Site is part of a **Parent Site**, *click* the **search field** and enter at least three-minimum characters to search for an Site. (Parent Site is not required to create a new Site site).
3. **Industry | Type | Status | Active** – *populate as necessary.*
4. *Click* Save



CRM: How to Create a Site (CRM & File Management Area)

A second type of **Site** is a Site that also has a **File Management Area**. Where users will manage their clients file(s), share file(s) or request file(s). To create a Site that has a File Management Area, the new Site will be create from the **System > Sites** feature.

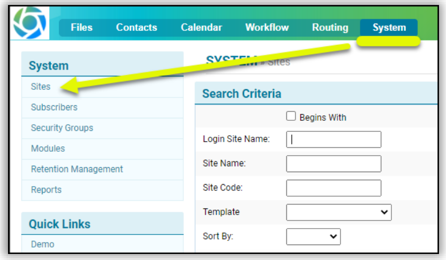
To create a Site with a File Management Area the new site will be created based off a "Template". The Template hold all the File Area structure (primary | secondary categories, security, etc.) to name a few.

"Templates" are defined by each Organization to create the File Management Area. Your System IT Administrator in conjunction with your iChannel Implementation representative will define all "templates".

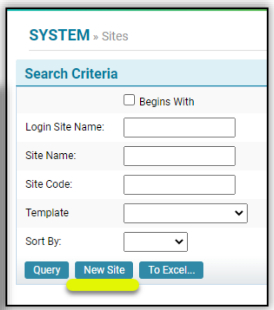
Before adding a new Site, it is recommended that you search for the client's name to prevent creating a duplicate site. In addition, your organization might select to import Site's through an interface. Please contact your System IT Administrator before creating a new site.

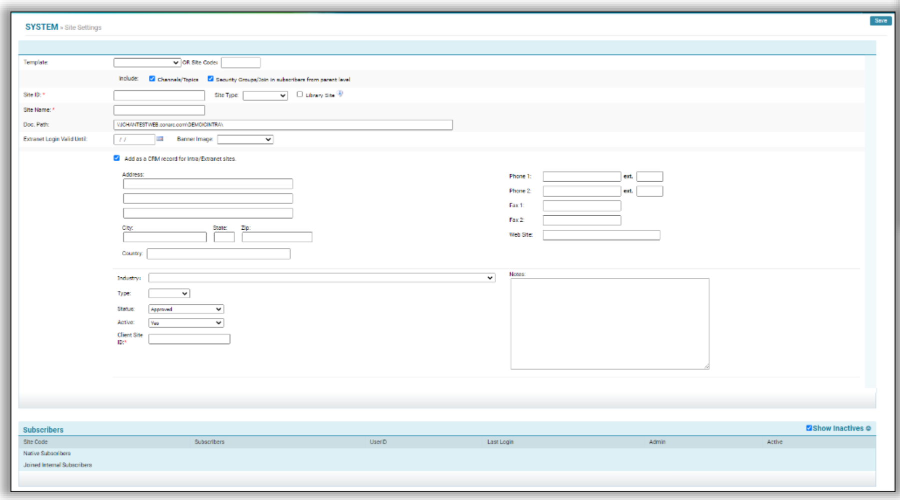
CRM – How to Create a Site (CRM & File Management Area)	
Step	**Action**

1	*Select* **System** from the banner. *Select* **Sites**. The **System >>Sites** page ill display. Before adding a new Site, it is recommended that you search for the client's name to prevent creating a duplicate site. In addition, your organization might select to import Site's through an interface. Please contact your System IT Administrator before creating a new site.

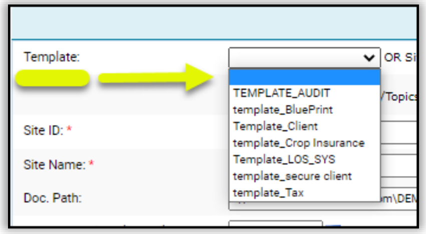


2	To *create* a new **Site**: 1. *Click* **New Site**. The **System >> Site Details** page will display.

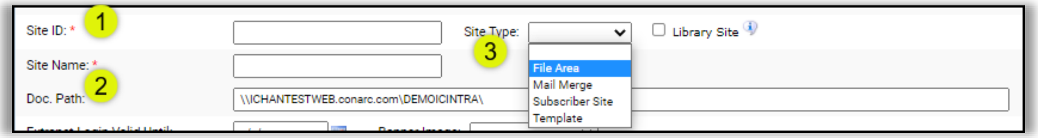




3	*Choose* a **Template** from the drop-down list. The list displayed is defined by your System IT Administrator. If a new template is needed, please contact your Administrator.
	- Leave the default checkboxes to Include:
	  - Channels/Topics
	  - Security Group/Join in subscribers from parent level.



4	1. **Login Site Name**: enter a description name for the new Site; click enter. 2. **Site Name**: field will auto-populate with the Login Site Name (you can update this field, but it's not necessary). 3. **Site Type**: choose a type from the drop-down list. If the new Site requires a file area, select the File Area from the list.



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The Doc. Path: this field will auto-populate with the file path for where the new Site file area file(s) will be stored.

- It's recommended to not update this field without consulting your System IT Administrator.

6

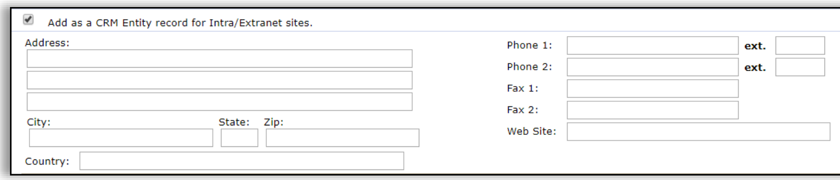
Extranet Login Valid Until: enter a date if you want the portal to automatically expire. This is valuable for prospects otherwise lLeave this field "blank".

Banner Image: (optional) users can select a banner theme for the Site.

7

Add as a CRM Site record for Intra (iChannel)/Extranet (Portal) site – leave the checkbox checked as this will save you the steps fore creating a separate client CRM profile and then linking it to the clients Site profile.

Address | City | State | ZIP | Phone | Website | Country – add as much information about the new Site as possible.



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Industry – choose from the drop-down list the industry that best identifies the new site.

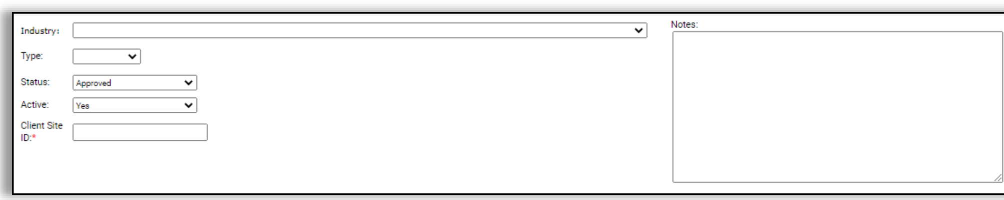
Type - choose from the drop-down list the type that best identifites the new site.

Status – choose from the drop-down list the status that best identifies the new site.

Active - if the new Site is **Active**, *select* **Yes**. When an Site is no longer active, *select* **No**.

ID – the ID field is required and is usually the unique identifer for the Site. Consult with your System IT Administrator to determine the ID.

Notes – (optional) enter additional notes as necessary.



Click **Save**.

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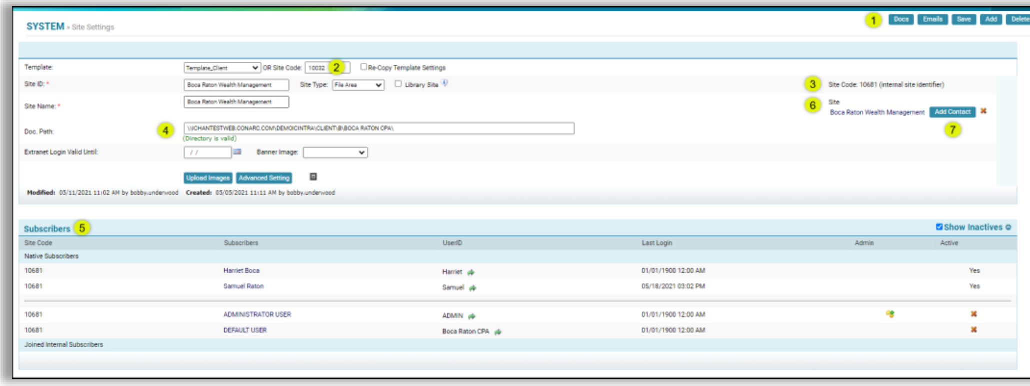
The new Site will be created and the **System >> Site Details** page will display.

A few highlights:

1. **Quick Links**:
   a. **Docs** – click this button to access the File Management Area
   b. **Emails** – to generate an email from this page, click the Email button
   c. **Save** – to save any updates to the Site Details, click the save button
   d. **Add** – to add a new Site (Site), click the add button
   e. **Delete** – to permantely delete the Site (Site), click the delete button
2. **Site Code** will be auto-genarated.
3. **Site Code** (internal site identifer) will be auto-genarated.
4. **(Directory is valid)** will display indicatating that the Doc. Path is active.

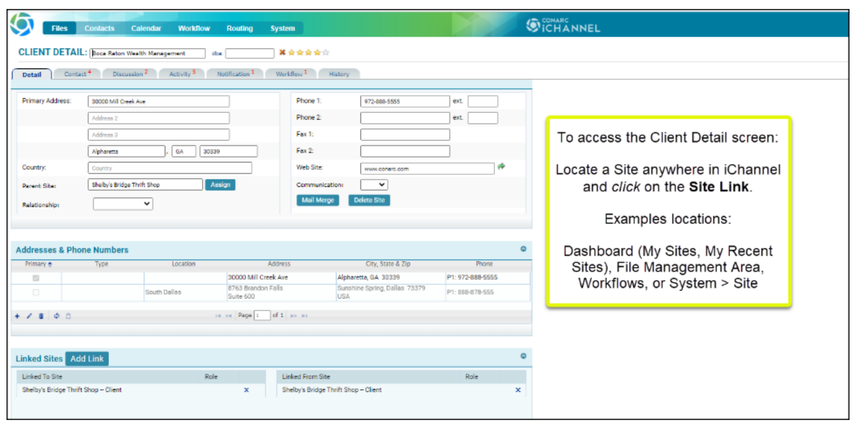
5. **Subscribers** – in this section, two (2) Subscirbers will be created.
    a. **ADMINSTRATOR USER** & **DEFAULT USER**
6. **Site Detail (link)** – click this link to access the Site Detail Screen (CRM).
7. **Add Contact button** – once an Site (Site) has been created, if there are contacts associated with the new Site; you can add contacts from this screen.



CRM: Site Detail Screen Overview

The Site Detail Screen provides a quick overview of your entire organization's relationship with the selected Site. Information is organized into tabs for easy access.

- Detail
- Contact
- Discussion Activity
- Notification
- Workflows
- History



Site Type – the type of Site (Client, Prospect, Vendor, etc.) will display before the Site name.
Site Name – the display name of the Site that is used for all searches in iChannel. This field will auto-resize to fit the contents.
DBA – "Doing Business As name". If there is a defined DBA name; the user can perform a "search" using the DBA name.
My Site Stars – allows users to setup **My Entities** on their **Dashboard** to quickly locate and access most often used entities (sites).
Action Buttons are based on your organization's security settings. You may not have access to all or any of these action buttons. Please contact your System IT Administrator if you feel you need access.

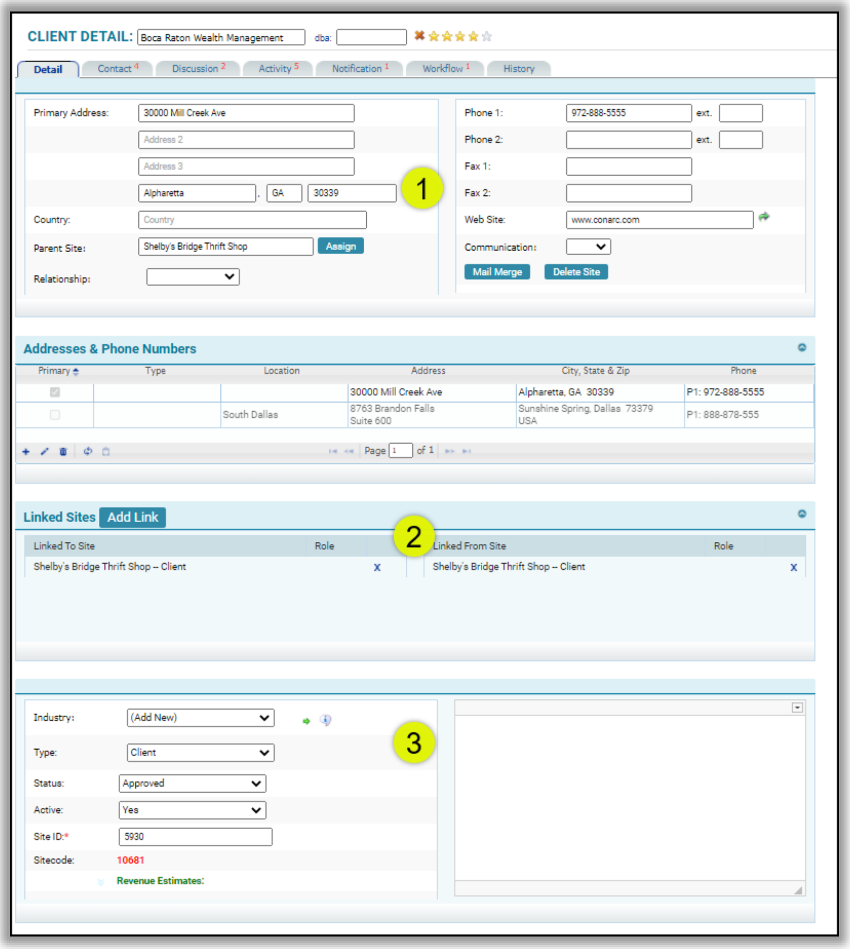
- **More** – click the drop-down arrow to access Emails, Add Site or Activity Report by Site
- **Save** – saves any updates or modification made to the detail page.
- **Docs** – navigates the user to the File Management Area for that client.

- **Site** – navigates the user to the Site Details for the Site.
- **Add Contact** – click and you'll be navigated to the Add Contact to add a contact to this Site.

CRM: Detail Tab

CRM – Detail Tab

Step	Action
	By *default*, the **Detail tab** will display. The Detail page is broken down into three main sections: **Client Address Information**, **Linked Entities**, and **Custom Client Fields**.



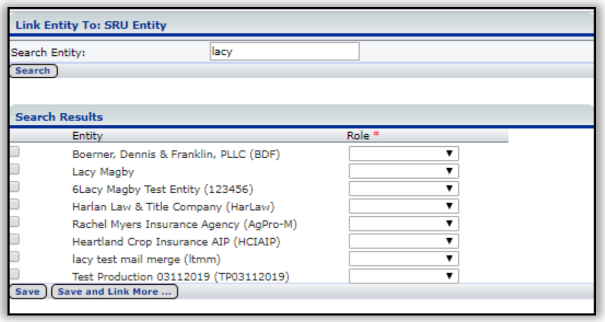
1 — **CRM – Detail Tab: Client Address Information**

- *Enter* the Primary Address, Parent Site (if necessary, Phone Numbers, Website, as necessary to define the new Site.

2 — **CRM – Detail Tab: Linked Entities**

1. If the new Site (site) being created is also Linked to another Site (site), *click* the **Add Link** button.
   - The Link Site to {Current Site} window display.
   - Select the Site(s) to link your {current Site} to.

- *Click* **Save** or **Save and Add More.**



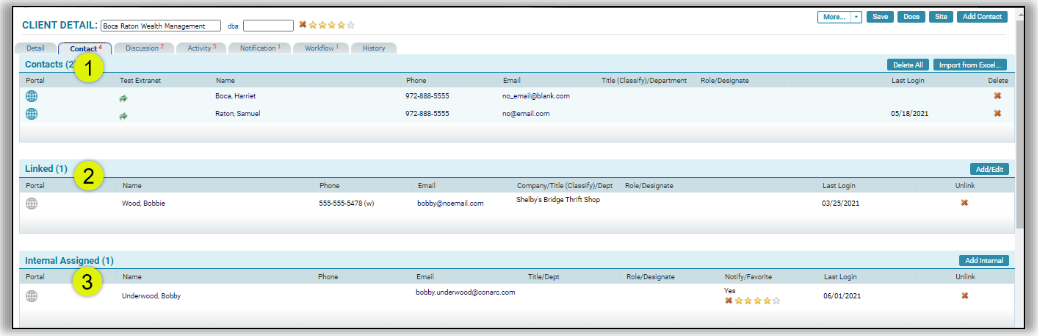
3 **CRM – Detail Tab: Custom Client Fields**

2. These fields are optional, and your Organization will determine the number of custom client fields to support your Site. Each Organization can have up to 150 custom fields.

CRM: Contact Tab

CRM – Contact Tab	
Step	**Action**

1 The **Contact tab** will display the total number of contacts associated with this Site (site). The **Contact 3** tab will display a **red number**, indicating the total number of contacts associated with this Site (site). **NOTE:** All contact entries are also defined as links for quick and easy access to the contact record.

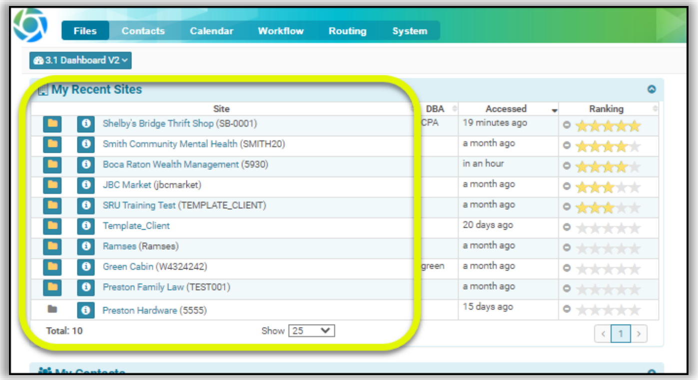


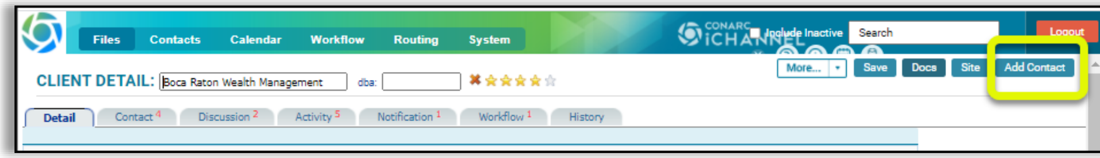
The **Contact** page is divided into *three main areas*:

1. **Contact** – all contacts that are associated with the Site (site). Typically, the external contacts for the Site (site).
   - **Delete All** – *click* this button to delete all contacts. **NOTE:** please contact your System IT Administrator before deleting any contact records.
   - **Import from Excel –** *click* this button to export out a list of all contacts associated with this Site (site).
2. **Linked** – this area will display any contacts, vendors, service provides, etc. *that are "linked"* into this Site. These linked contacts are in some ways associated with the main Site (site). To be linked, the contacts must have a primary Site contact record first.
   - **Add/Edit** – *click* this button to add another contact (Linked) to the Site (site). You can also edit any contact that is already linked.

	3. **Internal Assigned** – these contacts are the internal users (employees) of your organization that are associated with this Site (site, client). ○ **My Site Stars** – allows users to setup My Contacts on their Dashboard to quickly and easily access often used entities (sites).
	Key visual indicators: • - **Active** globe with a **Green Plus Sign** = Contact with Administrator privileges. • - **Active** globe indicates has access to iChannel Portal. • - an **Inactive** globe indicates the contact does not have access iChannel Portal. • = **Primary Contact** for the Site (Site). • = *Secondary Contact* for the Site (Site). • = if the Contact is Active and created to access the iChannel Portal, the **green arrow** will provide a quick access to the iChannel Portal from iChannel. Great for testing to ensure you have set up the Channel Portal for the user.

CRM: How to Create a Contact

Steps for How to Create a Contact	
Step	**Action**
1	From the **Dashboard**, access an Site, *double-click* the **Site Name** to access the **Clients CRM** where you would like to *create* the **Contact**. To quickly access the Site in iChannel, *click* on the **Site Name** when you want to go to the iChannel CRM module for that Site. 
2	*Click* **Add Contact**. If the **Add Contact** button is *not visible*, please contact your System Administrator to grant permission to add contacts.

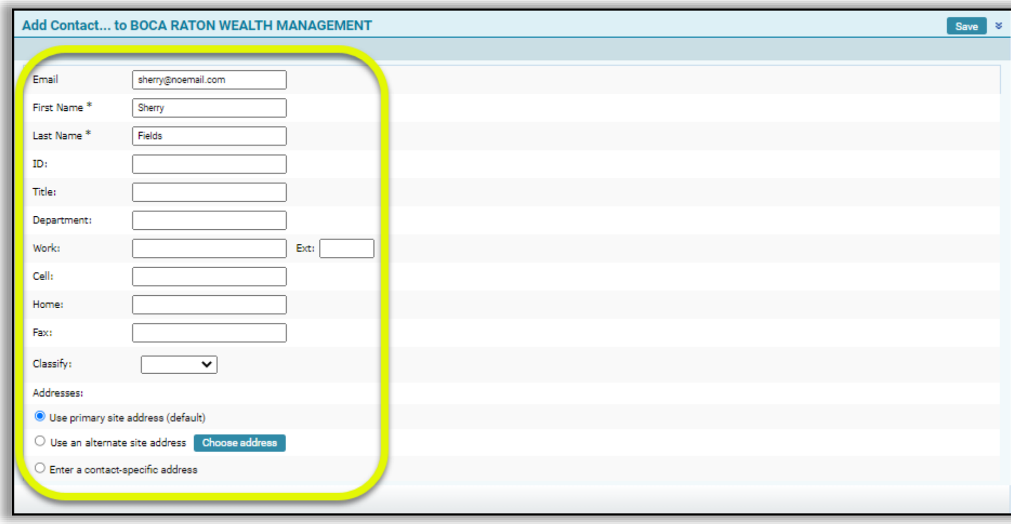


The **Add Contact…[Site Name…]** window display.

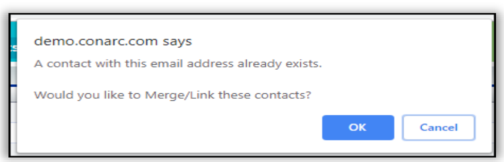
3

Enter the email address for the Contact in the **Email field**.
Enter the contacts first name in the **First Name** field.
Enter the contacts last name in the **Last Name** field**.**

Next, *click* **Tab** to expose the remaining fields; or *click* **Save**.



If the email address is already in iChannel, once the email is entered in the Email field, iChannel will perform a search to verify the email address. If the email address already exists, the below message will display. *Search* for the **Contact** instead.



The new Contact is now created in the Site (Site) and will appear under the Contact tab.

CRM: How to Identify and Resolve a Duplicate Contact

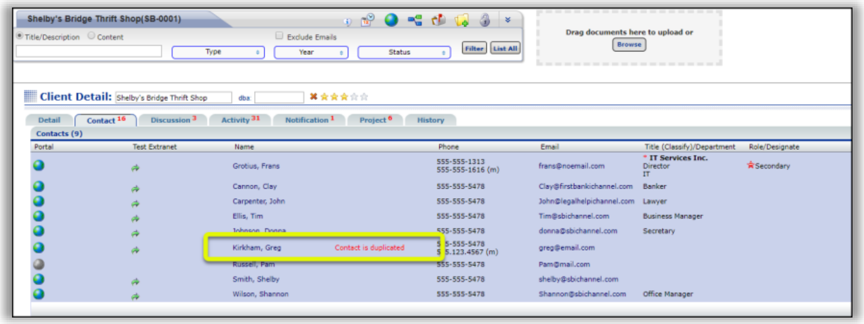
Steps for How to Identify and Resolve a Duplicate Contact	
Step	**Action**

1

When adding a new contact, iChannel validates the new contact information with the following data:

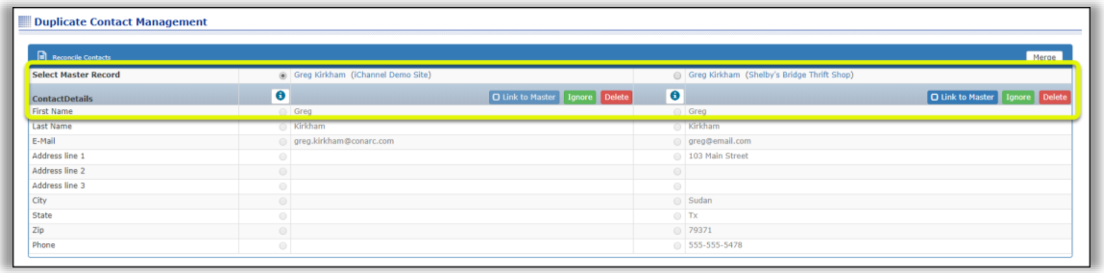
- **Email address**
- **First Name**
- **Last Name**

If any of these three triggers another match(es) already in iChannel, you will receive a message stating "**Contact is duplicated**". As a user, you have three options on how to handle the duplicate entry.



2

Click the link **Contact is duplicated.** The Duplicate Contact Management window will open.



The User has three options on how to resolve the Contact is duplicated:

1. **Link to Master** – keep the contact under the Master Site (Site) and links the corresponding Site.
2. **Ignores** – leaves the contact as a duplicate & give the user the option to remove the duplicate notification.
3. **Delete** – Deletes the contact record from the additional Site.

When working with **Contact is duplicate**, please work with your System IT Administrator to resolve.

To Merge the two records, *click* the **Merge** button.

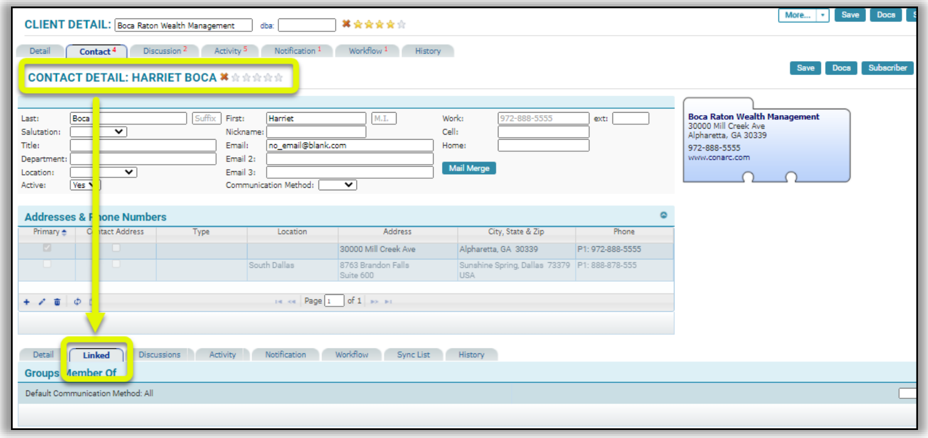
CRM: How to Link a Contact (External or Internal) to an Site (Site)

Steps for How to Link a Contact (External or Internal) to an Site (Site)

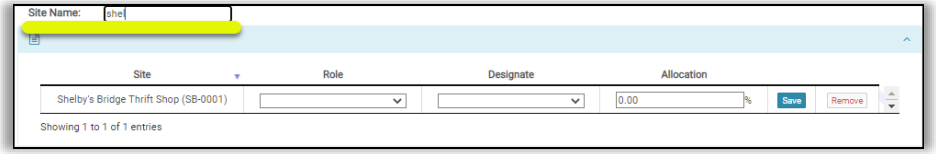
Step	Action
1	Often a contact will be created in their Primary Site yet will have the ability to work for another Site. In this case, it's recommended to always **Link the Contact to the other Site** so not to create a duplicate contact record.

From the **Dashboard**, access a Site, *double-click* the **Site Name** to access the **Clients CRM** where you *created* the **Contact**.

- *Select* a **Contact**. The **Contact Detail** page will display.

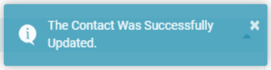


- *Click* the **Linked** tab. The Linked area will display.
- To link the contact to another Site, *click* the **Add/Edit** button. The **Site search** window will display.

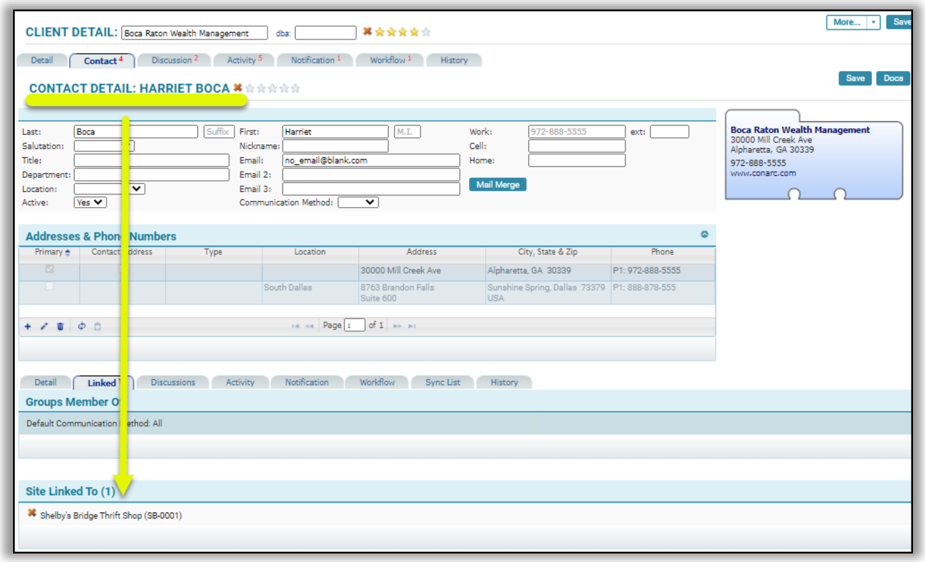


1. **Site Name**: search field. *Enter* at least **three-characters** to begin the search. iChannel will return all matches, select the match for the linked Site.
2. To add the new Site (site) as a linked record for the contact, *click* **Save**.

iChannel will display the following confirmation.

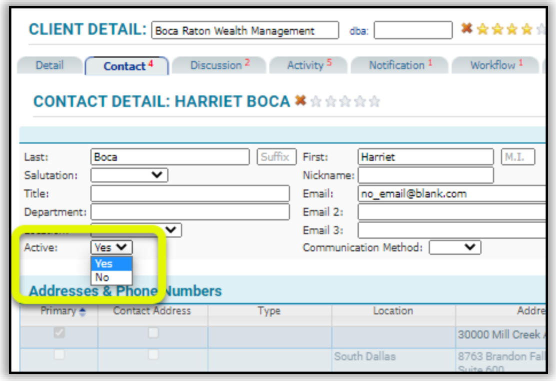


3. The user will be returned to the **Contact Detail** page. *Click* the **Linked** tab to see the newly linked Site(site).



CRM: How to Update a Contact from Active to Inactive

NOTE: It's recommends that any Contact that has been created in iChannel should not be DELETED; yet marked as "Inactive". Therefore, if you need to active the contact record, it record will not have to be created for the beginning.

Steps for Update a Contact from Active to Inactive	
Step	**Action**
1	*Click* the **Contacts** tab from the Main Banner. *Search* for the **Contact** by using the **filter options**. From the Contact Search Result window, click the contact name and link. • *Anywhere* in iChannel that you can locate a Contact and access their Contact Detail screen, you can mark a Contact as Inactive. In the **Active drop-down** list, *select* **No** to mark the Contact as **Inactive**.  If your Organization uses an iChannel Import to populate iChannel with Contacts, please contact your System IT Administrator before performing this feature.

CRM: How to Move a Contact

A user might need the ability to move a contact from one Site (site) to another Site (site). This might be due to a contact is added to the wrong Site (Site) by accident. It is also used when a group of prospects contacts are added to a single Site (site). Once there is a need to store files, the company Site (Site) is created, and the contact is moved. The destination Site must exist before the move. The ability is controlled by security. To move a contact, the user must have RPT access to the Contact/CRM Contact module.

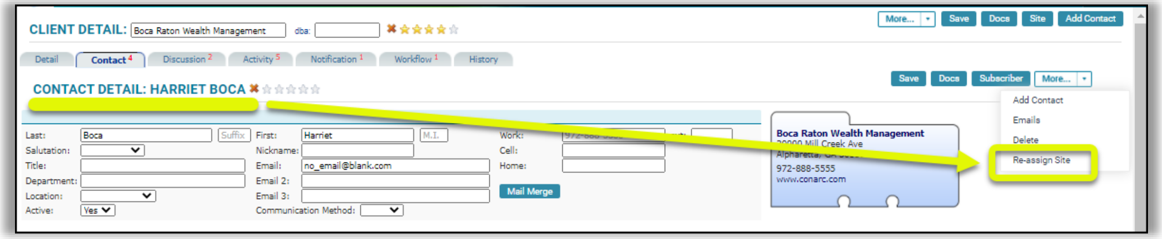
Steps for How to Move a Contact

Step | Action

1

Click the **Contacts** tab from the Main Banner. *Search* for the **Contact** by using the **filter options**. From the Contact Search Result window, click the contact name and link.

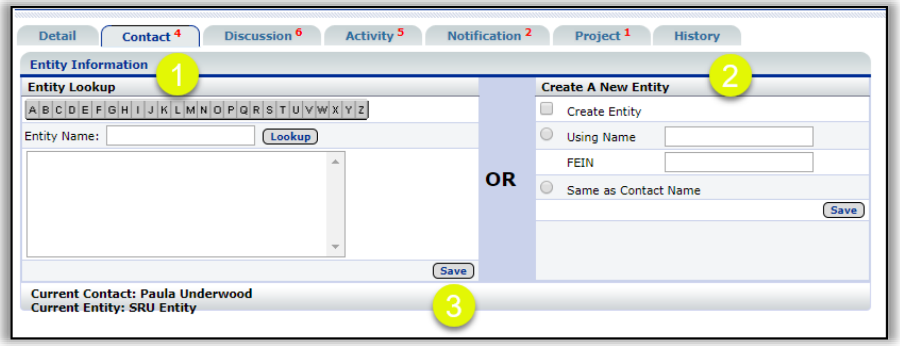
- *Anywhere* in iChannel that you can locate a Contact and access their Contact Detail screen, you can mark a Contact as Inactive.



Once on the **Contact Detail** screen, *click* the **More drop-down** list and *select* **Re-assign Site**. The **Site Information** screen displays.

2

1. *Search* for the Site by using the **Site Lookup** or perform a search in the Site Name field, *click* **Lookup**.
2. If the Site (site) is not already created, the user can **Create a New Site**.
3. *Click* **Save**.



If your Organization uses an iChannel Import to populate iChannel with Contacts, please contact your System IT Administrator before performing this feature.

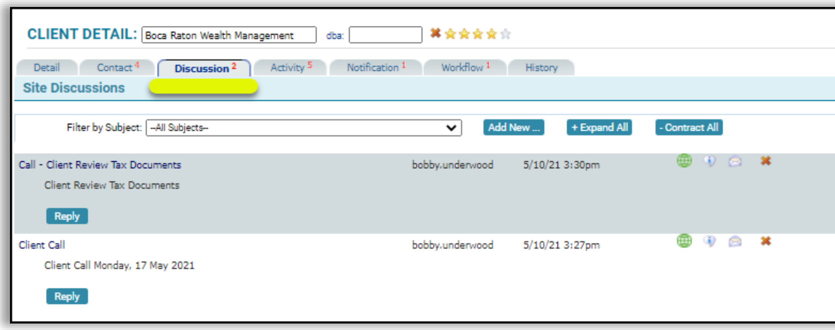
CRM: Discussion Tab

CRM – Discussion Tab

Step | **Action**

1

The **Discussion tab** will display the total number of internal discussions. The Discussion tab provides a blog-like area to add and share notes on the Site (Site) level, the Contact level and the file level. Discussion 3 the red number indicates the number of active discussions.



CRM: Activity Tab

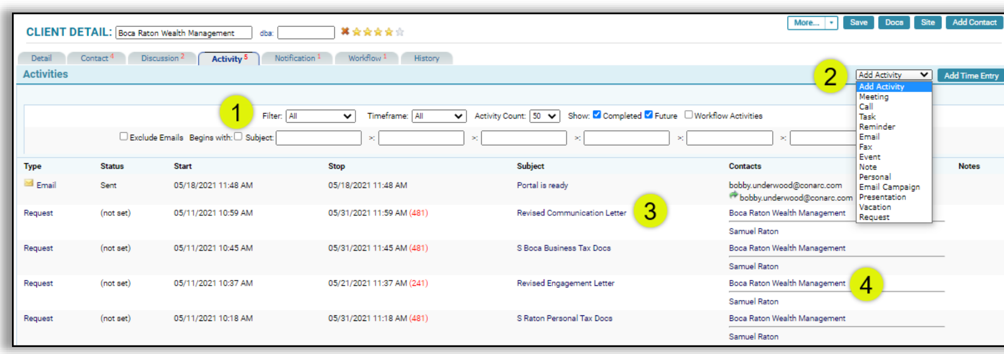
CRM – Activity Tab

Step | **Action**

1

The **Activity tab** will display all activities that have ever been created for this client by any user. Each Activity is linked to the Reminders Calendar, and each participant activity is linked to their corresponding detail information. Activity 31 the **red number** indicates the number of activities associated with the client.

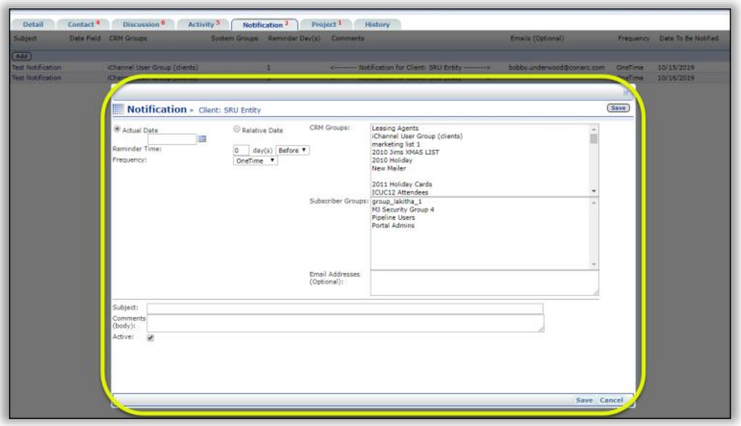
Activities are displayed on the Client Detail screen, the Contact tab, and the Workflow module. Additionally, activities can be viewed and accessed from the Dashboard (My Activities, My Calendar, and My Workflow widgets)



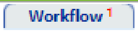
1. **Filter** – use the filter options to narrow the total number of Activities that are displayed.
2. **Add Activity** – this drop-down list gives the user the ability to add additional activities.
3. **Subject Quick Link** – *click* the **Subject link** to access the details of the activity.
4. **Contact Quick Line** – *click* the **Contact link** to access the details of the contact.

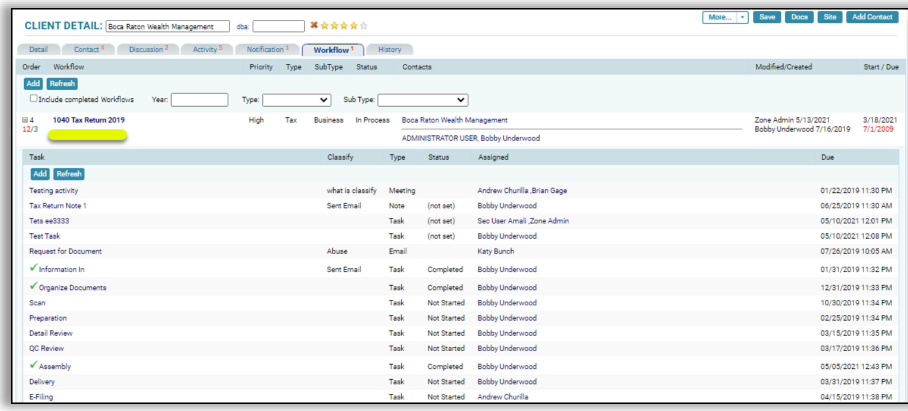
Click **Save**.

CRM: Notification Tab

CRM – Notification Tab	
Step	**Action**
1	The **Notification tab** will display all notifications for the Site(site) or for a contact.  the **red number** indicates the number(s) of notifications associated with the Site (site) or contact. Notifications allows for the creation of email reminders to be automatically sent to a person or a group. Features include options for the time, frequency and recipient groups or individual for the reminder. **NOTE:** iChannel Notifications simply servers as a group or individual reminder and is not to replace MS Outlook Calendar for meetings, alarms, etc. 

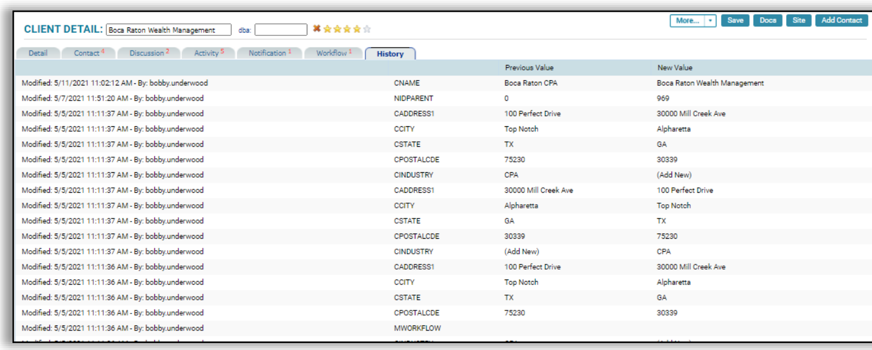
CRM: Workflow Tab

CRM – Workflow Tab	
Step	**Action**
1	The **Workflow tab** will display all workflows associated with the Site (site).  the **red number** indicates the number of workflows associated with the Site or contact. From the Workflow window, a user can view and add a Workflow. Additionally, the user can do a search to narrow down the number of workflows displayed on the grid. Users can work with an existing workflow by add new Task from the Workflow page. Users can also click on a Workflow name link to view the Workflow Detail Screen. Users can also click on a Task link to view the Activity Detail Screen.



- **Add** – *click* the **Add** button to create a new Workflow.
- **Workflow Search filters** – *define* the **Year**, **Type** and **Subtype** filters to narrow your search for a workflow.
- **Workflow Name** – *click* the **workflow name link** to open the **Workflow Details screen**.
- **Task Name** – *click* the **task name link** to open the **Activity Detail screen**.

CRM: History Tab

CRM – History Tab	
Step	**Action**
1	The **History tab** will display all changes made to the Site (Site) CRM record. Displayed by date, time, user, changes to fields with the previous and new values. 

CRM: Groups

In iChannel, there are two types of CRM Groups/List; Personal and Global.

- **Personal** – Personal Lists are private to each user but can be accessed by your System Administrator. The most common personal list is a list from Outlook. Each user specifies the contacts they want to sync with Outlook. Personal List names are created by iChannel Implementation team and are customizable to your organization. In general, they are called Personal List 1, 2, etc. and the purpose is determined by your users. For example, a salesperson may use Personal List 1 for prospects and a manager may use the same list for the staff.

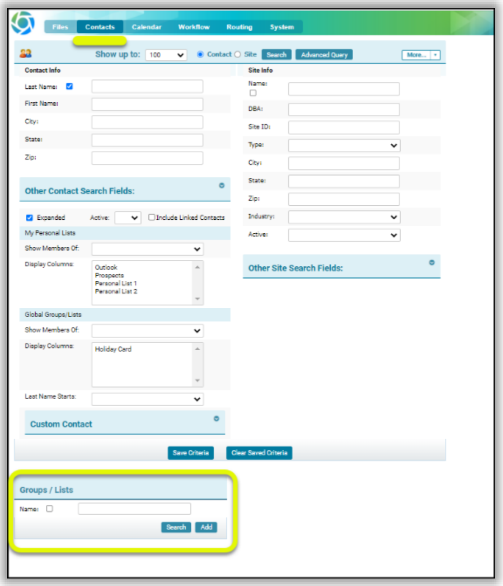
- **Global** – can be created by your users (with security access) and are accessible to all users in iChannel. Example: list names include Newsletters, Holiday Cards, Support Contacts, Marketing Contacts, etc. These lists are widely used by marketing staff.

CRM: How to Add a Global Group

<table>
<tr><th colspan="2">CRM – How to Add a Global Group</th></tr>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

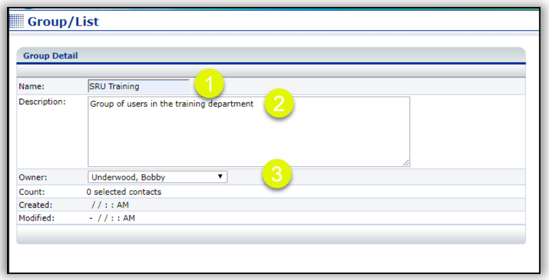
Groups are a nice feature when a database becomes so large that filtering does not narrow the search enough. Groups could also be setup for workflows needing contact from multiple Site/Sites.

Click the **Contacts** tab from the Main Banner. In the **Groups/List** section, *click* **Add.**



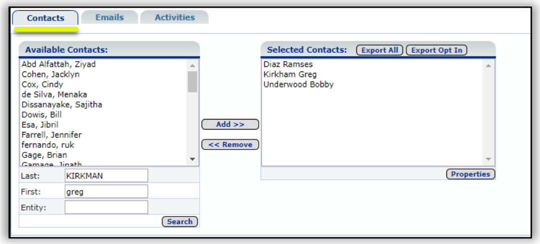
</td></tr>
<tr><td>2</td><td>

1. On the **Group/List** screen, *enter* a **Name** for the Group/List.
2. *Enter* a **Description** (optional) in the description section.
3. **Owner drop-down** list *select* a **user** to be the owner of the group.
4. *Click* **Add.**

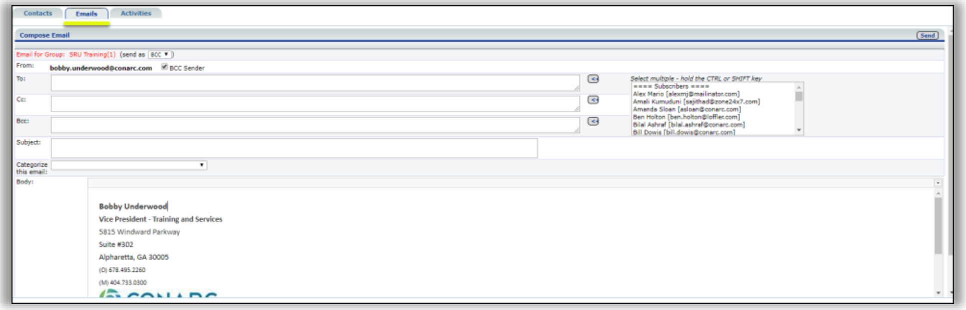
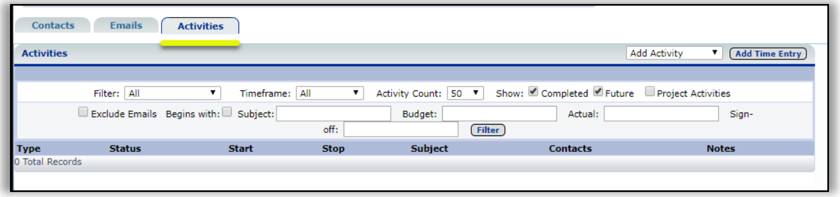


</td></tr>
<tr><td>3</td><td>

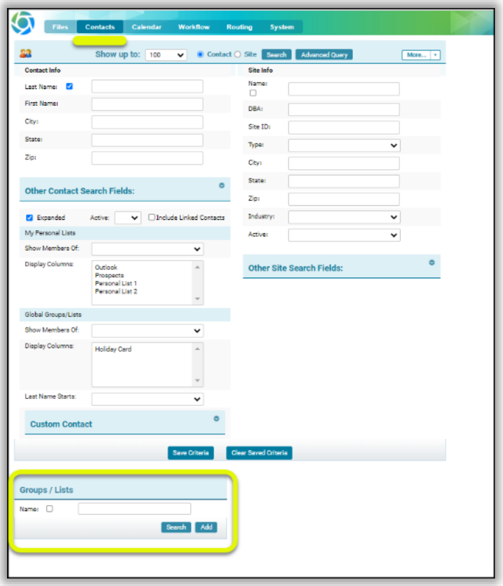
Contacts tab, *add* all the contacts to the **Selected Contacts** section. Users can also do a search on the Last, First, Site to quickly locate contacts.



</td></tr>
</table>

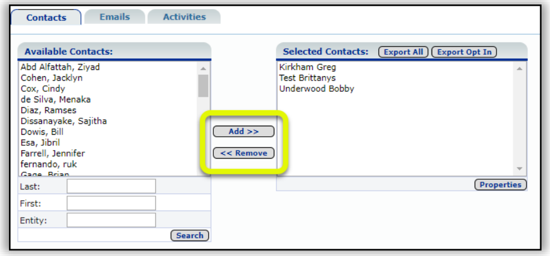
4	**Emails** tab, allows users to associate the emails with group of users that may expand across multiple Entities (Sites). • *Click* **New Email,** the **Compose Email** screen displays**.** *Compose* an email as normal and *click* **Send**. 
5	**Activities** tab, allows users to create an activity for the group. The activity will display on the Activities tab for the Group and also for each member of the group on their activities widgets or individual tabs. • *Click* the **Add Activity** drop-down to create a new activity. 

CRM: How to Add Contacts to Personal List | Global Groups via the Contact Search

CRM – How to Add Contacts to Personal List | Global Groups via the Contact Search	
Step	**Action**
1	*Click* **Contacts** from the main ribbon. The **Contact | Site** search screen will display. In the **Groups / List Name** field, *enter* or *search* for the **group / lists** to add the contact. *Click* **Search**. 

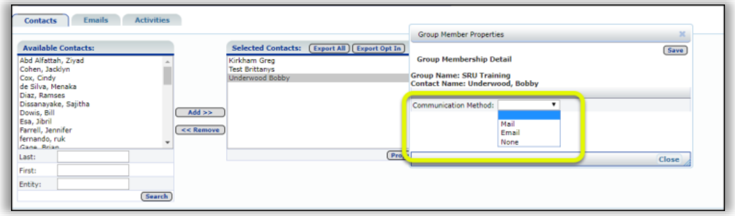
On the **Group / List Results**, *select* your **Group or List**.

2 To add additional Contacts to your Group/List, *highlight* contacts in the **Available Contacts** list and *select* **Add >>**. Hold down the CTRL key to highlight multiple contacts at once.



3 To view and set the Communication Method for a contact in the Group/List, *highlight* a **Contact** and *select* the **Properties** button. The **Group Member Properties** window will display.

Select the **Communication Method drop-down** list to *select* a **method**.



4 A User can export the Group/List Contacts by access the Group/List screen. *Select* the **Export All button** in the **Selected Contacts** section.