Webchise User Guide

Introduction
This document contains the user guide for the Look Local Webchise system. This is a 'Customer Relationship Management' (CRM) system which will be at the heart of your business.

1 Creating a New Company

The 'Company Tab' is where all information is stored about each company that you have information about. This can be a prospect, customer or a supplier.

- Click on the 'Create Company' option on the left hand 'short cuts' menu
- Complete the Company record with as much detail as possible, it is vital for your future marketing that addresses, emails and mobile numbers are entered.
- Save the record

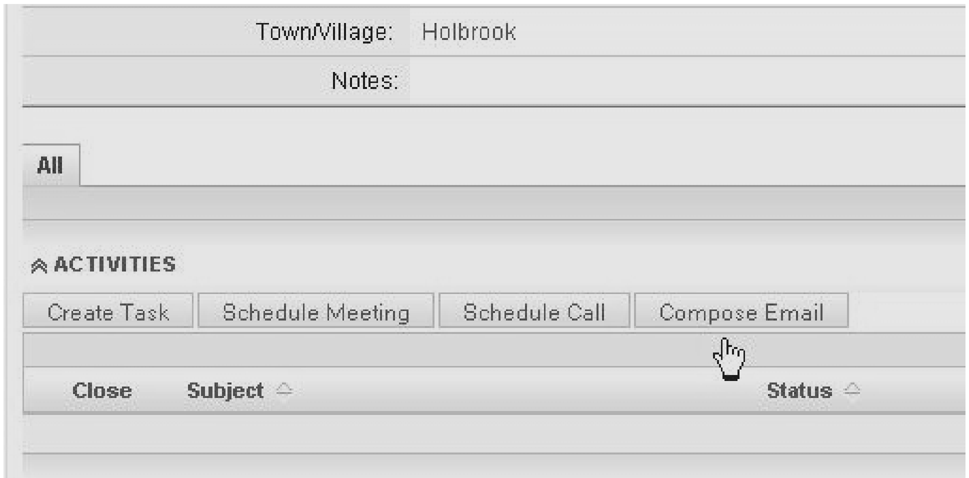
2 Creating a Contact within a Company

Once you know who the contact is within the company you can add their details as follows

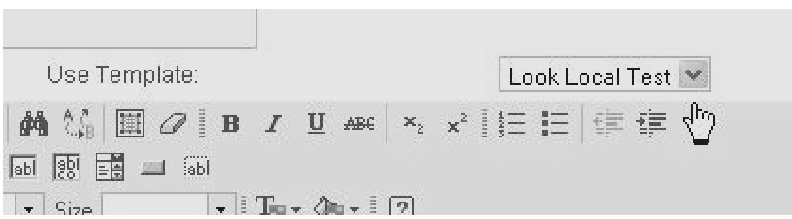
- Find the company record
- Click on the contacts section below the company details.
- Click create
- Enter the contact details in the full form.
- Click save

3 Sending the pricing template email

- From the Company record click 'Compose Email' in the 'Activities' section below the companies details.



Select the Pricing email Template

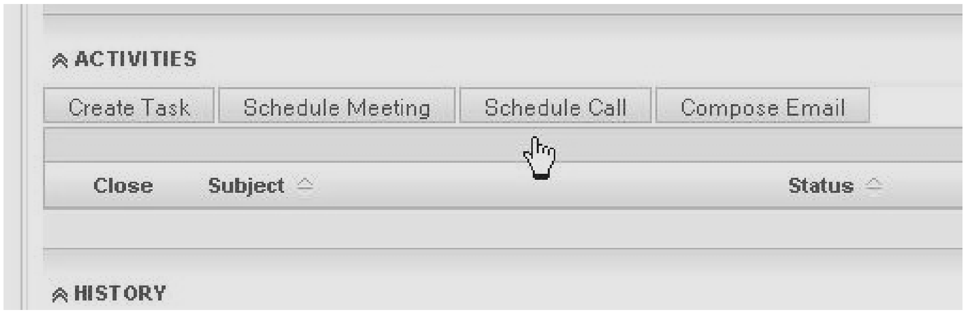


- Attach the appropriate pricing document

- Click Send.

4 Setting a Follow up Call

- From the Company record click ‘Schedule Call’ in the ‘Activities’ section below the Lead’s details.



- Fill out the description of the call you want to make (e.g. “Follow up pricing sent to Joe”)
- Set the date/time you want to call them
- Click Save

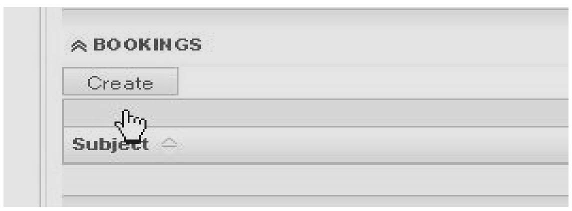
5 Creating a Booking

5.1 What is a Booking?

Criteria -	An advert which has been requested, but the artwork has not yet been approved and/or not yet paid for
Info -	Advert Dates, durations and Books

5.2 Create a Booking

- Select the Company record.
- In their record, scroll down until you reach the ‘Bookings’ section and click ‘Create’



- In the Booking Subject enter the **Month and Year** that the advert is due to appear ie **NOV09**
- Enter the advert start date, using the ‘calendar pop up’ which will be the **2nd day of the month** that they place the advert in.
- If a discount is going to be applied set the discount level.
- For each Area an advert is required, click ‘Add Area’ and then enter the name of the area.
- Then for each area click ‘Add Advert’ for each advert required and start typing the advert details:
    - Quarter Page
    - Half Page
    - Full Page
    - Double Page
- The options will be displayed (1 month, 3 month, 12 months, etc) – select the appropriate duration.
- When complete Save the Booking.

6 Create the Invoice

- Select the company from the companies tab and select the relevant booking from the subject list i.e OCT09.
- Click ‘Convert to Invoice’

- The invoice details will be displayed. If you know how the customer is going to pay, set the “Payment Method”. This is especially important if the customer is paying by Direct Debit or Credit Card.
- If the details are correct, click ‘Post Invoice’ and the invoice will be created
- Click on the “Download to PDF” to see the invoice and then print it, or you can save it to a specific folder ready to be emailed it to your customer.
- Email the ‘Invoice’ along with the ‘Advert Proof’ to the customer.

7 Creating an Order

Criteria - An advert which has been proofed and paid for and needs to be included in the book
Info - Advert Dates, duration and area.

- When the invoice has been paid and the artwork accepted, you will need to “Accept the Advert”
- Select the Booking record
- Click ‘Accept Advert’ and the order records will be automatically created.
- This will have created an Order from the Booking

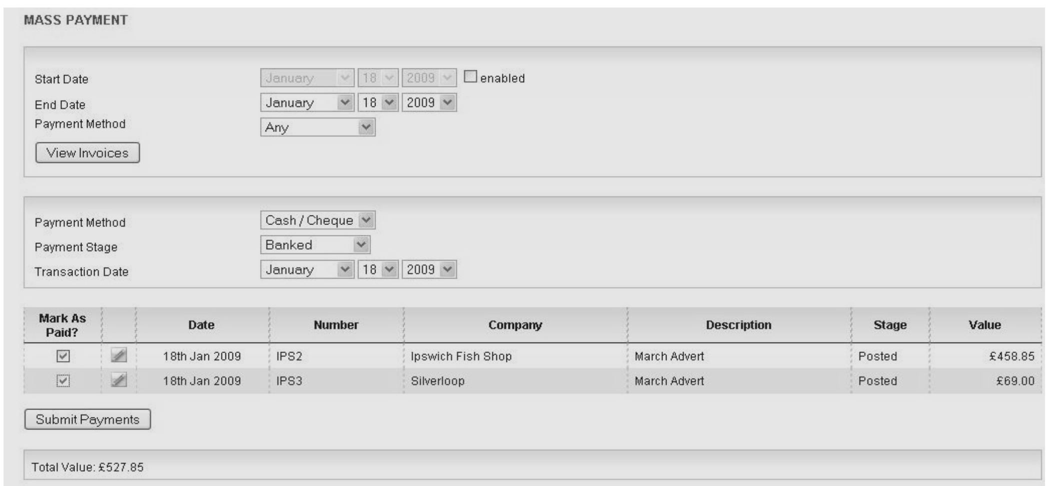
8 Banking Payments

Credit Card and Direct Debit payments will be handled by Head Office, so you do not need to do anything with these once the invoice has been raised.

8.1 Registering Cheque and Cash Payments

You do need to register that adverts paid for by cheque or cash have been paid into the bank.

- Select the “Finances” area within the Intranet
- Select “Invoicing” and then “Mass Payment”
- Click “View Invoices” to see all the outstanding invoices
- Select the Payment Method “Cash / Cheque”, select the Payment Stage “Banked” and then set the date that you paid the money into the bank
- Select the invoices that you paid into the bank and the amount will be totalled automatically and when correct, click the ‘Submit Payments’ button.



8.2 Expense Payments

To record expense payments:

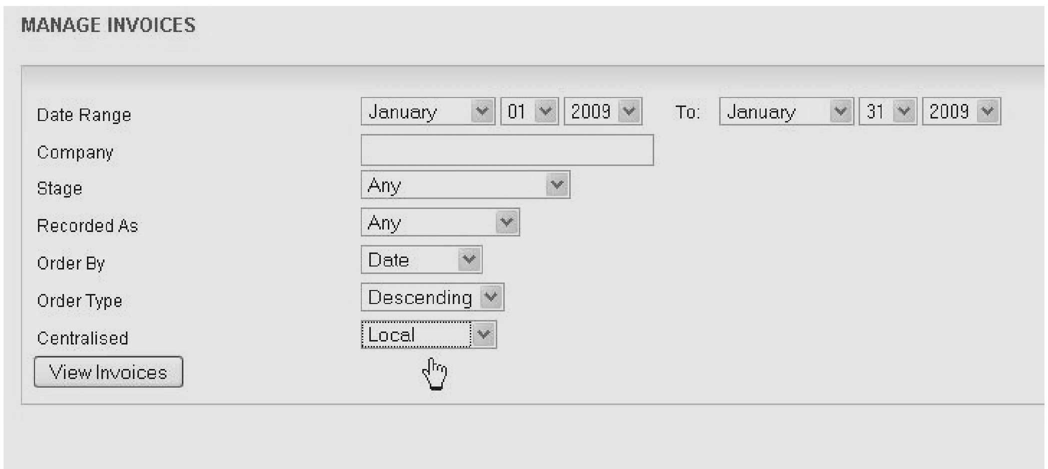
- Select the “Banking” area within the “Finances” area.
- Select “Add Payment”
- Enter the following information:
  - The Date of the Payment
  - A Description of the payment (e.g. petrol)
  - The correct expense category for the payment
  - The applicable VAT rate for the payment (if you have a VAT receipt select ‘Standard’. If you do not have a receipt select ‘Zero’.
  - The amount of the payment (including any VAT)
- Save the Details and the payment has been entered.

8.3 Marking Monthly Invoices as Paid

The invoices for the payments you will receive and the deductions to be paid to Head Office will be automatically generated.

When you receive payment you will need to mark them as Paid, to create the Bank Transactions.

- Select the “Invoices” area within the “Finances” area.
- Select “Manage Invoices”
- Set the ‘Centralised’ option to ‘Local’ so that it will display your invoices rather than Head Office Invoices:



- Click on “View Invoices” and a list of your invoices will be displayed.
- To pay an invoice, click on the edit icon
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View Invoices

	Date	Number	Company	Description	Stage	Type	Value
	18th Jan 2009		Look Local Ltd.	Franchise Deductions: 2009-01-01 to 2009-01-31	Posted	From Supplier	£257.62
	18th Jan 2009	INV.1	Look Local Ltd.	Franchise Payment: 2009-01-01 to 2009-01-31	Paid (Unreconciled)	To Customer	£1,245.45

- Scroll to the bottom of the invoice and select ‘Make Payment’
- Set the payment date to the date the invoice was paid, set the ‘Stage’ to ‘Banked’ and then click ‘Make Payment’
- Repeat for the other invoice.

8.4 Reconciling Bank Transactions

9 Banking Payments

Head Office will handle Credit Card and Direct Debit payments; refer to franchisee user manual for Terms & Conditions, so you do not need to do anything with these once the invoice has been raised.

You do need to register that adverts paid for by cheque or cash have been paid into the bank.

- Select the “Finances” area within the Intranet
- Select “Invoicing” and then “Mass Payment”
- Click “View Invoices” to see all the outstanding invoices
- Select the Payment Method “Cash / Cheque”, select the Payment Stage “Banked” and then set the date that you paid the money into the bank
- Select the invoices that you paid into the bank and the amount will be totalled automatically.

10 Marketing Campaigns

All Marketing Campaigns and emails to groups of people are managed from the Campaigns module within the CRM section

There will be 3 main types of campaign:

- Telesales – Calling a list of target companies.
- Newsletter – Regular emails to a list of target companies
- Email – One off, or irregular, emails to a list of target companies.

A campaign is run against one or more Target Lists

10.1 Creating a Target List

You can select individual records, or select a report to use to fill the target list, e.g. “Previous Customers who do not have a current advert”.

- From the Campaign module select ‘Create Target List’
- Enter the name for this Target List. It is always best to give a description name, e.g. “March Telesales Call List”.
- Select the Type of List. The list types are:
    - Default – The list of people who are going to receive the email or phone call.
    - Test – A list of people who will receive a test email
    - Suppression – A list of people who you want excluded from the campaign
    - Seed – A list of people who will receive the campaign email, but will not be tracked as potential leads. This would be used if you want to copy Head Office, or staff in on the campaign emails, whilst ensuring they are not treated as potential leads.
- Save the Target List

The Target List now needs to be populated.

- Scroll down to the 3 sub panels titled ‘Targets’, ‘Contacts’ (Customer contacts) and ‘Leads’.
- Use the ‘Select’ Option to select records individually
- Use the ‘Select from Reports’ to fill the Target List with the list generated by the selected report.

TIP – It is a good idea to run the report you want use first (from the ‘Reports’ module) to make sure it is returning the list you want. If it does not, you may need to alter some of the filter options within the report, for example a date range, to get the list you're looking for.

You can create as many Target Lists as you choose, to group different contacts together for different campaigns.

10.2 Creating a Campaign

Now that we have created our Target Lists we can create a Campaign.

- From the 'Campaigns' module select 'Campaign Wizard'
- Select the Campaign Type and then 'Start'. The Campaign Types are:
    - Newsletter – For regular emails – for example the monthly email reminding customers of the copy dates for the book
    - Email – For marketing campaigns.
    - Non-email Based – For example the Telesales calls.
- The process for each of these is slightly different and described below

10.2.1 Newsletter Campaigns

- Complete the Campaign Header information:
  - Name – The name of the Campaign
  - Status – Set this to 'Active'
  - Start Date – The Intended start date of the campaign
  - End Date – The intended end date of the campaign.
  -
- Click 'Next'. You do not need to enter any budget details, so click 'Next' again.
- The 'Campaign Trackers' section allows you to create special links which can be added to your email to see whether people have clicked on them. We will not use them at this time, so click 'Next'.
- Select one of the Target Lists we created earlier for the Subscription List. If you created a 'Test' Target List add this to the Test List Subscription.
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- Select 'Next' and now we set up the email to be sent out.
  - Name – The name of the email
  - Use Mailbox – Select the name of the mailbox that will receive any bounced emails.
  - Status – The status of the email – only emails with a status of 'Active' will be sent out. During the setup and testing phase, the status should be set to 'Inactive'
  - From Name – The 'name' you would like the email recipient to see.
  - Start Date & Time – The earliest time you would like the email sent. When this date/time is reached and if the status of the email is 'Active' it will be scheduled to be sent to the selected Target Lists.
  - Email Template – Select the email template you wish to use for this campaign, or click 'Create' to create a new email.
  - Select the Targets Lists you wish to send the email to.
  -
- Click 'Next'
-
- The campaign is now built. Select one of:
  - Finish – Shows the Campaign Summary
  - Send as Test – Will send the email to the Test Target List, so that you can check it is correct.
  - Schedule Email – Says that everything is ready to go and the emails will be scheduled to be sent after the scheduled date/time is reached.

10.2.2Email Campaigns

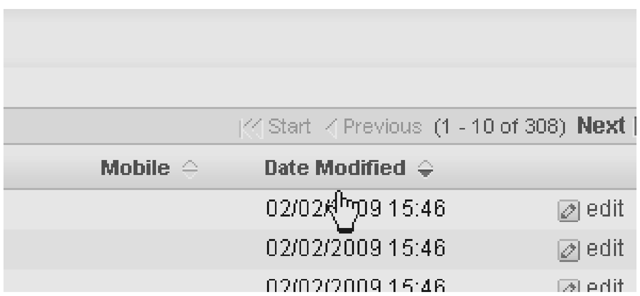
- Complete the Campaign Header information:
  - Name – The name of the Campaign
  - Status – Set this to 'Active'
  - Start Date – The Intended start date of the campaign
  - End Date – The intended end date of the campaign.
  -
- Click 'Next'. You do not need to enter any budget details, so click 'Next' again.
- The 'Campaign Trackers' section allows you to create special links which can be added to your email to see whether people have clicked on them. We will not use them at this time, so click 'Next'.
- Select the Target Lists you want to use for this email. You can select more than one. It is always advisable to select at least one Test Target List so that you can check the emails are correct before sending to the main list.
- Select 'Next' and now we set up the email to be sent out.
  - Name – The name of the email
  - Use Mailbox – Select the name of the mailbox that will receive any bounced emails.
  - Status – The status of the email – only emails with a status of 'Active' will be sent out. During the setup and testing phase, the status should be set to 'Inactive'
  - From Name – The 'name' you would like the email recipient to see.
  - Start Date & Time – The earliest time you would like the email sent. When this date/time is reached and if the status of the email is 'Active' it will be scheduled to be sent to the selected Target Lists.
  - Email Template – Select the email template you wish to use for this campaign, or click 'Create' to create a new email.
  - Select the Targets Lists you wish to send the email to.
- Click 'Next'
- The campaign is now built. Select one of:
  - Finish – Shows the Campaign Summary
  - Send as Test – Will send the email to the Test Target List, so that you can check it is correct.
  - Schedule Email – Says that everything is ready to go and the emails will be scheduled to be sent after the scheduled date/time is reached.

10.2.3 Telesales Campaigns

- Complete the Campaign Header information:
    - Name – The name of the Campaign
    - Status – Set this to 'Active'
    - Start Date – The Intended start date of the campaign
    - End Date – The intended end date of the campaign.
- Click 'Next'. You do not need to enter any budget details, so click 'Next' again.
- The 'Campaign Trackers' section allows you to create special links which can be added to your email to see whether people have clicked on them. We will not use them at this time, so click 'Next'.
- Select the Target Lists you want to use for the Telesales campaign. You can select more than one.
- Click 'Next'
- The campaign is now built.

To run the telesales campaign:

- From the 'Campaigns' Module click on 'Target Lists'
- Select the Target List you wish to use.
- The list of Targets for call will be displayed 20 at time.
- The 'Date Modified' column will show the last time the Target was contacted. Click on the 'Date Modified' column heading to get the records ordered with the oldest appearing first.



- The contact details of each target will be in the list.
- Make the call
    - If Target wants more information, or to place a booking, open the target record and click on 'Convert Target' to create the Lead record and then follow the usual Lead conversion and booking process.
    - If the Target wasn't interested, edit the record and add the notes to the description field and save the changes.
    - If you couldn't get through, do not edit the record and it will stay at the top of the list to try again later.