



USER MANUAL



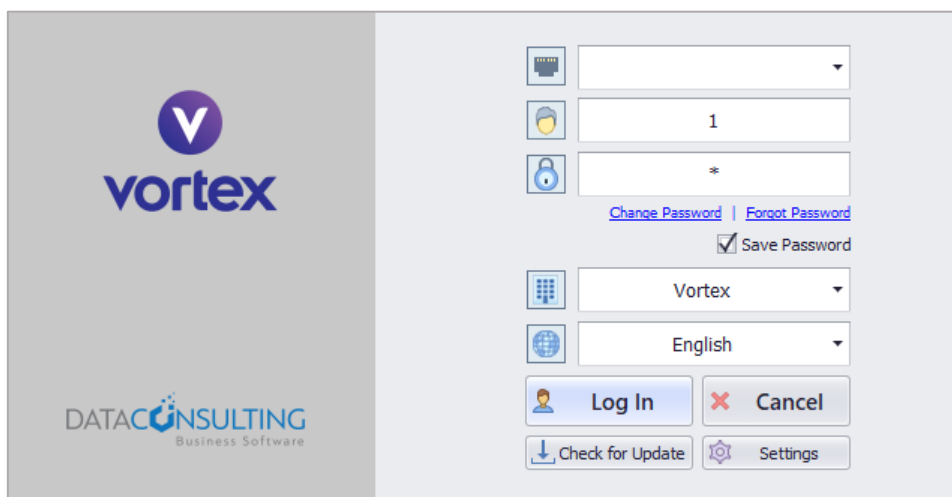
Contents

SIGNING IN TO THE APPLICATION.....	3
TRADERS.....	4
CONTRACTS.....	17
CRM ACTIONS	20
MEETINGS	26
SALES OPPORTUNITIES.....	30
QUOTES.....	32
CALENDAR.....	36
MARKETING CAMPAIGNS.....	40
DEPARTMENTS.....	45
PERSONNEL LEAVE	46
WAREHOUSE	47
PRODUCTS.....	47
PRODUCT TEMPLATES.....	50
ATTRIBUTES.....	52
SUPPLIERS	53
SETTINGS.....	54
USERS	54
EMAIL ACCOUNTS	55
ROLES	56
PARAMETERS	57

SIGNING IN TO THE APPLICATION

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To sign in to the application, the administrator must enter his username and password, which are personal and have been created by the administrator himself.



The login form features the Vortex logo and DATACONSULTING Business Software branding on the left. On the right, there are input fields for Username (with a user icon), Password (with a lock icon), and Company (with a grid icon). Below these are dropdown menus for Language (with a globe icon) and a 'Log In' button. There are also links for 'Change Password' and 'Forgot Password', a 'Save Password' checkbox, a 'Cancel' button, and buttons for 'Check for Update' and 'Settings'.

The **Vortex CRM** Module is a comprehensive customer relationship management solution designed with all the necessary tools and functionalities to provide a clear overview of customers, from the very first meeting with them until after-sales service. Our software offers specialized sales and marketing automation features as well as customer support and service functions.

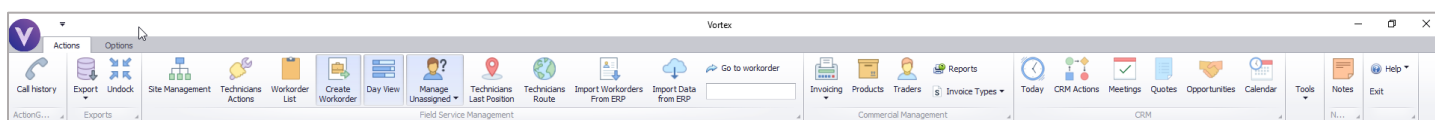
Let us start with the basic navigation menu:

- Traders
- Resources
- Warehouse
- CRM Actions
- Settings

The information displayed in the menu may be modified by right-clicking on **Customize Menu**, which opens a special tab that helps us hide certain menu functions.

Each of the main options contains the corresponding action sub-menus.

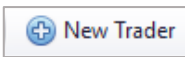
The functionalities you will encounter when using the application will be explained in the following sections. The navigation bar provides quick access to the most frequently used functions.



TRADERS

This section displays all Traders (customers, potential customers, collaborators, suppliers), their key information, transaction data (if the **Vortex CM** Module has been installed), and CRM data.

How do we create a new trader?

To create a new Trader we click on the icon . Many fields are self-explanatory. Only the required explanations are provided below.

The main tab is divided into three parts:

INFORMATION

Displays all customer information (i.e. name/company name, VAT number, address, city, etc.). It is recommended to provide an email address in order to keep customers informed about the progress of the work undertaken but also to send bulk emails, as and when necessary. The contact information contains a field called **One Site**. If we select the check box then a site (customer branch) will be automatically created in the customer tab and will contain the customer's company name in the description.

TRANSACTION DATA (requires the **CM Module**)

The CRM Module contains the entire customer base of the company. Prospective customers, who have not engaged in any financial transaction with the company, are considered customers and the corresponding check box is selected. (Image 1.1.1)

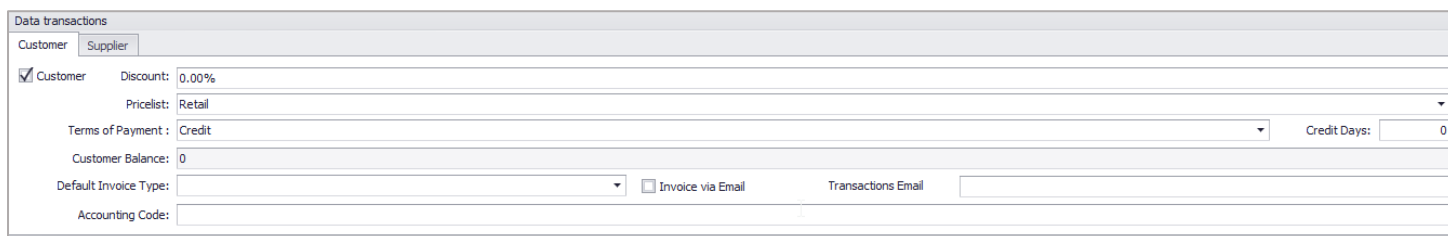


Image 1.1.1

The same steps should be followed for suppliers, in the Supplier tab (Image 1.1.2).

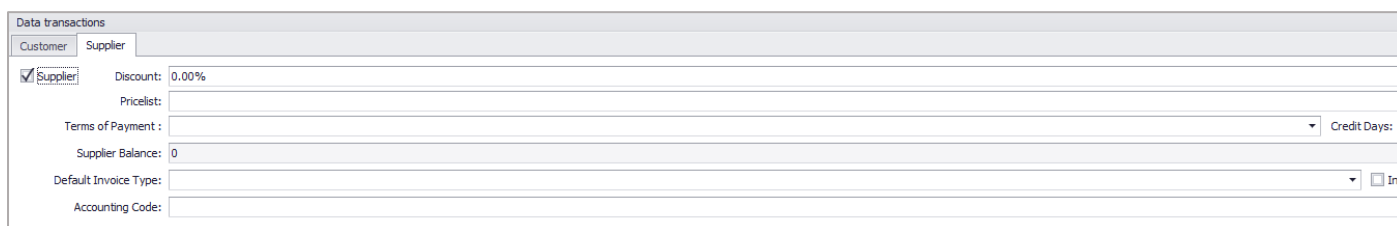
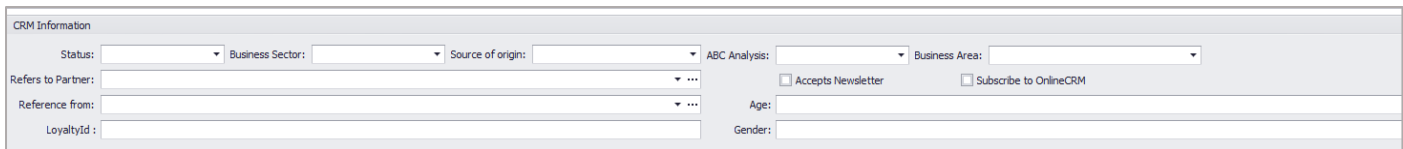


Image 1.1.2

CRM DATA (Image 1.1.3)



CRM Information

Status: Business Sector: Source of origin: ABC Analysis: Business Area:

Refers to Partner: ☐ Accepts Newsletter ☐ Subscribe to OnlineCRM

Reference from: Age:

LoyaltyId: Gender:

Image 1.1.3

Status: Customer status (potential customer, active customer, etc.).

Activity: The business activity of the customer.

Origin: The customer's source of origin.

ABC Analysis: Customer segmentation (A, B and C) according to the criteria defined by us.

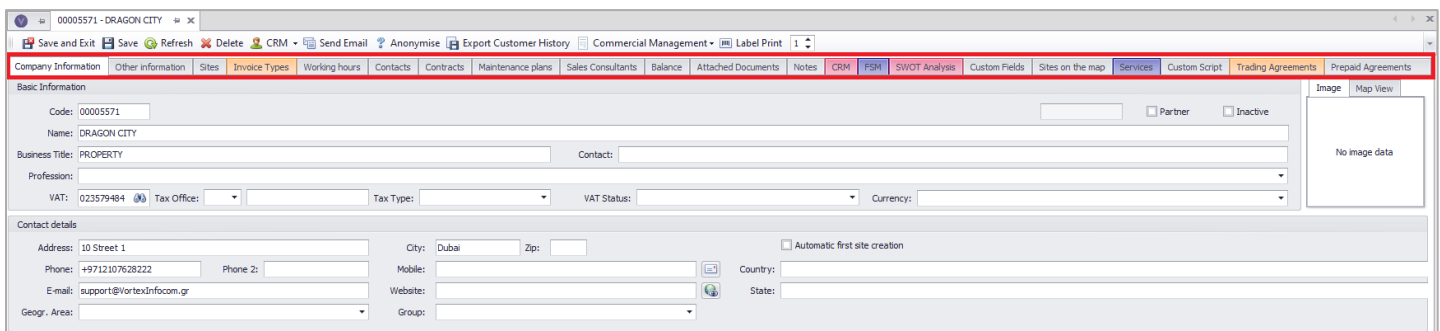
Industry: The industry in which the customer operates.

Recommended from: Optional field, to be completed if a recommendation has been made by another customer or partner of ours.

Refers to partner: Customer managed by one of our external partners.

Loyalty ID: Optional field, to be completed if the customer benefits from a reward system (loyalty cards) of the company.

All Trader information is organised under the following tabs (Image 1.1.4):



00005571 - DRAGON CITY

Save and Exit Save Refresh Delete CRM Send Email Anonymise Export Customer History Commercial Management Label Print

Company Information Other information Sites Invoice Types Working hours Contacts Contracts Maintenance plans Sales Consultants Balance Attached Documents Notes CRM FSM SWOT Analysis Custom Fields Sites on the map Services Custom Script Trading Agreements Prepaid Agreements

Basic Information

Code: 00005571 ☐ Partner ☐ Inactive

Name: DRAGON CITY

Business Title: PROPERTY Contact:

Profession:

VAT: 023579484 ☐ Tax Office: Tax Type: VAT Status: Currency:

Contact details

Address: 10 Street 1 City: Dubai Zip: ☐ Automatic first site creation

Phone: +9712107628222 Phone 2: Mobile: Country:

E-mail: support@vortexinfocom.gr Websites: State:

Geogr. Area: Group:

No image data

Image 1.1.4

Other information: The trader's social media presence, etc.

Sites: Customer stores/branches. By double-clicking on a site description, we can see all its information in detail (Image 1.1.5).

Site Management

Save Cancel Copy Site

Call Communications Active Contracts Attached Documents Photos CRM Actions Map directions from HQ Custom Fields

Site information Departments/Contacts Site History Installations Zones Agreements Site addresses

Basic Information

Customer code : 00005265

Customer name : BANK LLC

Site Code : 601 ☐ Is mobile ☐ Inactive

Description : Sharjah Branch

Address : Buhaiah Corniche Branch Buhaiah Corniche Road

City : Sharjah Zip. :

Phone :

Mobile :

Email :

Manager :

Distance from HQ : 0 km

Hours :

Monday	Tuesday	Wednesday	Thursday	Friday	Satur
From					
08:00					
To					
15:00					

Site Date : 6/26/2017

Geogr. Area :

Salesperson :

Account Manager :

Default Service :

Default Technician :

VAT status :

Partners :

Partners
☐ DC
☐ ITMANIAC
☐ RDC
☐ ARTIFED

Latitude/Longitude : 25.3428099 55.3857019 Refresh Map

Map showing Sharjah area with landmarks like King Faisal Mosque, Al Ittihad Park, New Medical Centre (NMC), Dar Al Hikmah Medical Laboratory, Al Noor Mosque, Bee'ah Head Office, McDonald's, and Citymax.

Map controls: Basic Satellite Hybrid

Image 1.1.5

Documents: Requires the **CM Module**.

Sales: Requires the **CM Module**.

Business Hours: The customer's daily business hours.

Contacts: All customer contacts are added here. Multiple contacts can be managed per customer, with a phone number and an email address provided for each contact.

Contracts: Creation and monitoring of all maintenance contracts concluded with customers.

Maintenance Plan: Requires the **FSM Module**.

Sales Consultants: The salesperson responsible for a particular customer.

Balance: Requires the **FSM Module**.

Attached Documents: Allows files (documents) to be attached.

Notes: Various notes about the customer.

CRM: In the Traders pane, we can undertake the following CRM actions: *CRM Action*, *Meeting*, *Quote* and *Sales Opportunity*. The steps for creating and entering these actions will be discussed later on. (Image 1.1.6)

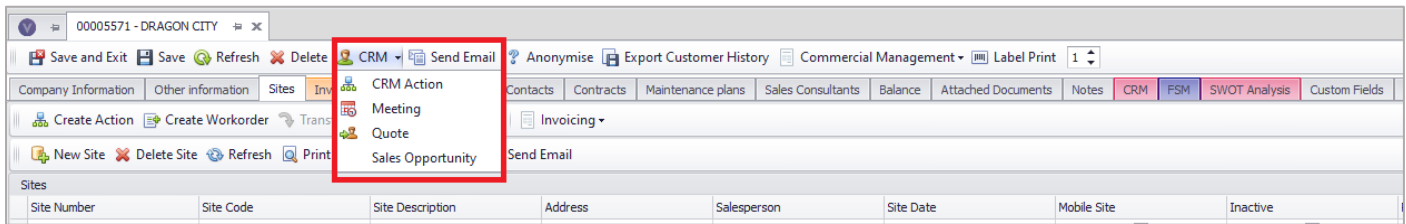


Image 1.1.6

FSM: Functions of the FSM Module.

SWOT Analysis: A SWOT analysis (which stands for **Strengths, Weaknesses, Opportunities, Threats**) examines the strengths and weaknesses of a business, as well as the opportunities and threats of the environment in which it operates. It is used by businesses to assess their current situation in order to help them make decisions and shape their future strategy. A SWOT analysis is an extremely useful decision-making tool for those companies that use it. (Image 1.1.7)

 A screenshot of the VortexCRM web application showing the 'SWOT Analysis' form. The top navigation bar is identical to the previous image. The 'SWOT Analysis' tab is active and highlighted with a red box. The form contains several text input fields with labels: 'Customer Description:', 'Customer Goals:', 'Strong Customer Points:', 'Customer Opportunities:', 'Weak Customer Points:', 'Customer Threats:', 'Financial Data:', 'Competition:', and 'How the customer conducts business:'.

Image 1.1.7

Custom Fields: New custom fields created by the user.

Site on the Map: The exact coordinates (latitude and longitude) of a site/branch on the map.

Services: Requires the **FSM Module**.

Custom Script: Requires the **FSM Module**.

The following options appear at the top of the screen:

Save and Exit: Saves and closes the current tab.

Save: Saves the entry or any changes that have been made.

Refresh: Refreshes the contents of a tab.

Delete: Deletes the current entry. Attention: There must be no transactions for the specific customer (no entries).

CRM: Available CRM actions.

Send Email: Allows users to send an email to a trader through the application.

Anonymisation: Allows users to render fields that contain personal data anonymous (based on the requirements of the European General Data Protection Regulation-GDPR). Users will be prompted for confirmation because this action is final and there is no way to restore it (**Image 1.1.8**):

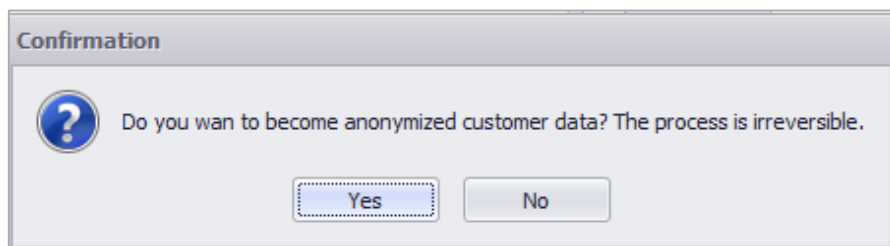


Image 1.1.8

Export Customer History: Requires the **FSM Module**.

Invoicing: Requires the **CM Module**.

Print Label: Requires the **CM Module**.

How do we open a new customer branch (site)?

At the top right corner of the site's tab, where the actions are listed, we press  (**Image 1.1.9**). Then we take the following steps:

Site 'SUPERMARKET'

Create Action Create Workorder Transfer Site Transfer Product Invoicing

New Site Delete Site Refresh Print Preview Quick Print Send Email

Customer Information

Code : 00018604 Name : SUPERMARKET

Phone : Profession:

Address : 66 New Drive Road VAT :

Site Number	Site Code	Site Description
3967		FIRST FLOOR

Image 1.1.9

We fill in all the necessary information about the site (**Image 1.1.10**), such as name, address, city, etc. It is recommended to provide an email address in order to keep customers informed about the progress of the work undertaken but also to send bulk emails, as and when necessary.

Site Management

Save Cancel Copy Site

Call Communications Active Contracts Attached Documents Photos CRM Actions Map directions from HQ Custom Fields

Site information Departments/Contacts Site History Installations Zones Agreements Site addresses

Basic Information

Customer code : 00018604

Customer name : SUPERMARKET

Site Code : ☐ Is mobile ☐ Inactive

Description : FIRST FLOOR

Address : 66 New Drive Road

City : Abu Dhabi Zip :

Phone : Mobile : Email : Manager :

Distance from HQ : 0 km

Hours : Monday Tuesday Wednesday Thursday Friday Saturday

From 09:00 To 22:00

Site Date : Geogr. Area : Salesperson : Account Manager : Default Service : Default Technician : VAT status : Partners : Partners

DC ITMANIAC RDC ARTIFED

Latitude/Longitude : 24.453884 54.3773438 Refresh Map

Map showing location of the site in Abu Dhabi.

Image 1.1.10

Optional Fields

By entering the address and the zip code of the site and pressing **Search** , the exact coordinates (latitude and longitude) are displayed on the map. This feature requires signing in with Google Maps API.

Business Hours: Displays the customer's weekly business hours.

Partners: Requires the **FSM Module**.

All the information of a site/branch is organised under the following tabs:

Contacts: Allows us to enter the contacts of a (branch/company) site and their position in the company.

Site History: Requires the **FSM Module**.

Zones: Requires the **FSM Module**.

Agreements: Requires the **FSM Module**.

Site Addresses: The addresses of customer sites and their coordinates.

Call Log: Tracks the customer's call history with the company. This requires a call centre connection to the application.

Active Contracts: All the contracts of a customer site.

Documents: Allows documents to be attached using the + icon.

Photos: Allows photos to be attached using the + icon.

CRM Actions: Any CRM actions that have been added to the customer.

Instructions from Headquarters: Requires the **FSM Module**.

Custom Fields: Custom fields that have been created at the site.

At every customer site, the following key actions are available on the top right corner of the screen:



Create a new customer site



Delete the entire site



Refresh content



Document preview: helps users to see what their document with all the site information will look like when they actually print it



Print site and miscellaneous information



Send email to users

At each site, we can view all the products we have installed along with their serial numbers (**Image 1.1.11**)

Sites									
Site Number	Site Code	Site Description	Address	Salesperson	Site Date	Mobile Site	Inactive		
3967		FIRST FLOOR	66 New Drive Road Abu Dhabi			☐			

New Product
 Add Product Template
 Delete
 Refresh Products

Site Details 'FIRST FLOOR'														
Product De...	Product Type	ID	Installed	Install Date	Notes	Image	Removed	Removal Date	Zone	Code	Warranty E...	Contact	Departmen...	Installation ...
HP LASE...	LASER	12344	☐	1/1/0001		No image data	☐		MEETING R...	000019		JOHN SMITH	SALES DEPT	
LENOVO ...	PC	55555	☐	1/1/0001		No image data	☐		MEETING R...	000161		JOHN SMITH	SALES DEPT	
Samsung...	SSD DISC	SDFR345-873	☒	8/10/2020		No image data	☐			C000071	8/10/2020	JOHN SMITH	SALES DEPT	

Attributes	Serial	Contracts
Attribute	AttributeValue	ID
Serial No	SDFR345-873	

Image 1.1.11

How do we add a product to the site?

We click on the **New product** icon which opens up the following tab (Image 1.1.12):

AI Ghurair Parking - VARIOFLEX PAY PARKING SYSTEM

Basic

Actions

Measurements

Photos

Attached Files

Custom Fields

Save and Exit

Save

Remove Product

Undo Removal

Delete

Print

Print Label

Product Transfer

Copy Product

Copy Product to other Sites

Assign to Contract

Select Product Template

Basic Information

Zone Products

Notes

Installation Products

Map

Site : 3963

Type : PARKING PAY SYSTEMS

Product : VARIOFLEX PAY PARKING SYSTEM

Zone :

Service :

Notes : ☐ Installed 12:00:00 AM

Contact :

Belongs to :

Barcode :

Partners :

Image :

Contracts

Contract	Contract...	Contract Start	Contract End	SLA (Minutes)	Period...	Every ...	Service	Active	Notes	Default Technician
								☐		

Attributes

Attribute Type	Attribute Value	ID

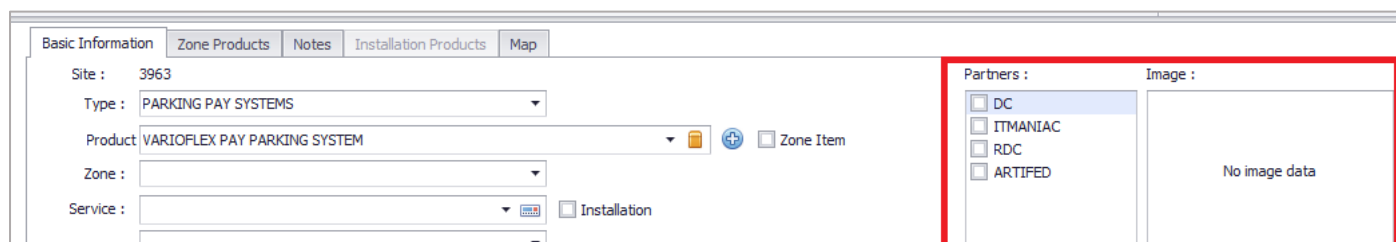
Image 1.1.12

In terms of the basic product information, the administrator will need to fill in all mandatory fields such as: Type, Product, Installation Date.

In the **Product** field, the  icon will display a list containing all of the company's products, in order to open a new product that is not yet available. The way to create a new product will be described in another section.

We can add a product using its Code, Description and Product Type by clicking on  and then save our entry by clicking on .

We then select the **Subcontractors** who will be granted access to the product information. Finally, the **Load** button (Image 1.1.13) will allow us to add a photo of the product.



The screenshot shows the 'Basic Information' tab of the Vortex CRM interface. The 'Partners' section is highlighted with a red box, showing a list of partners: DC, ITMANIAC, RDC, and ARTIFED. The 'Image' section shows 'No image data'.

Image 1.1.13

Displayed below are the contracts that have been created for the specific product. Attention: Contracts are NOT created at this stage (this will be discussed in more detail in the next section).

The next step involves the creation of product attributes.

In **Attributes**, at the bottom left corner of the screen, we click on the Add special attribute  icon, such as serial number, warranty, next service (all attributes can be customized).

To save the entry, click on . To delete the current row following confirmation click on . To identify the specific attribute of a product click on the ID check box. **Image 1.1.14**

Basic Information | Zone Products | Notes | Installation Products | Map

Site : 3963
 Type : PARKING PAY SYSTEMS
 Product : VARIOFLEX PAY PARKING SYSTEM
 Zone :
 Service :
 Notes : ☐ Installed 12:00:00 AM
 Contact :
 Belongs to :
 Barcode :
 Partners :
 Image :
 No image data
☐ No workorders allowed
☐ No workorders authorized by Customer Portal
 Created by workorder :
☐ Zone Item
☐ Installation

Contract	Contract...	Contract Start	Contract End	SLA (Minutes)	Period...	Every ...	Service	Active	Notes	Default Technician	...
								☐			

Attribute Type	Attribute Value	ID
Serial No	IPO258000	☒

Image 1.1.14

What is a product template and how do I add it to a customer site?

A product template is a product with recommended product attributes (standard specifications) for common and repeated use across many sites. It is essentially a model product for multiple sites. Click on [Add Product Template](#) to select the product template that needs to be copied to a site. The way to create a product template will be discussed in another section.

A toolbar with the following functions has been placed on the tab of each product, at the top of the screen: **Image 1.1.15**

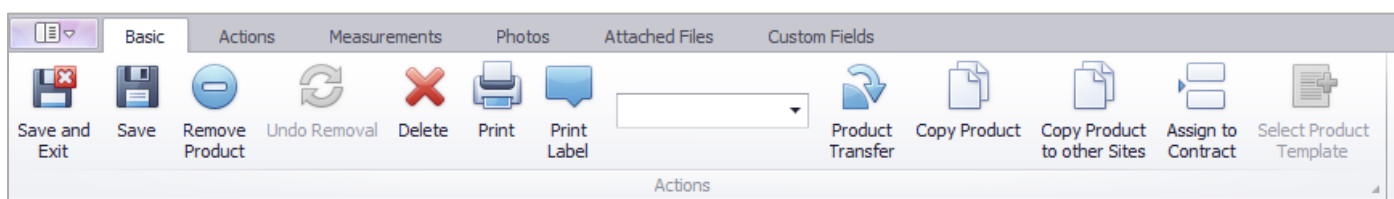


Image 1.1.15



Save product and close tab after confirmation



Save entry



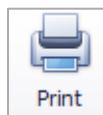
Remove product from site. The product will remain inactive at the site (for logging purposes) **Image 1.1.16**

Site Details 'FIRST FLOOR'													
Site Products		Site History		Contracts									
Product De...	Product Type	ID	Installed	Install Date	Notes	Image	Removed	Removal Date	Zone	Code	Warranty E...	Contact	Departmen...
			☐			No image data	☐						
HP LASE...	LASER	12344	☐	1/1/0001		No image data	☐		MEETING R...	000019		JOHN SMITH	SALES DEPT
LENOVO ...	PC	55555	☐	1/1/0001		No image data	☐		MEETING R...	000161		JOHN SMITH	SALES DEPT
Samsung...	SSD-DISC	SDFR345-873	☒	8/10/2020		No image data	☒	3/17/2021		0000071	8/10/2020	JOHN SMITH	SALES DEPT

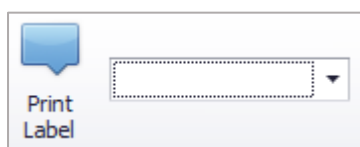
Image 1.1.16



Delete product



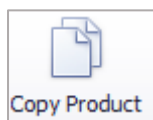
Print tab with product information



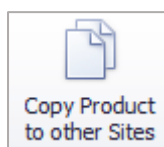
Print label with product information using the label printer



Transfer product (along with all its attributes) to another customer site



Copy product. Users define the number of copies they want. (**Image 1.1.17**)

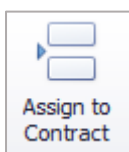


Copy product to other sites: copies a product to other sites belonging to the same customer. Users may choose if they want to copy the contracts and product attributes.

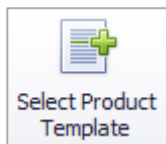
Select	Code	Site	Number of Copies
☐			
☒		POWER STATION	1

☒ Include Contracts
☒ Include Attributes
☒ Include Zone Products (Zone Creation)

Image 1.1.17



Assign to contract: matches a product to a site contract.



Select product template: allows users to select a product template -> (provided that product templates have been created -> products with specific typical attributes). Product templates can be copied from here. (Image 1.1.18)

Product Templates	
New Product Template	
Template Description	Product
PC LENOVO	LENOVO 9383
SCANNER	FUJITSU fi-5120c
INKJET	LEXMARK C500n

Image 1.1.18

Finally, the workorders related to the specific product, the workorder measurements, the photos and the custom fields are displayed in each product (**Image 1.1.19**).

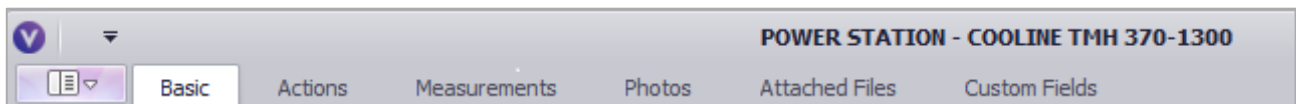


Image 1.1.19

To close a page, simply click with the middle mouse button on its tab.

CONTRACTS

In Vortex CRM users can create customer contracts.

In these contracts we can add all the information of any agreed support or maintenance services provided to customers.

This information is used by the CRM module to manage service-related calls.

To create a new type of Contract, we click on the add icon  in **Contracts** and fill out the fields below (**Image 1.2.1**):

Contract Number	Contract Description	SLA (Minutes)	SLA limit	Product ID	calculation based on whole months
11	Support Contract 12h		360		
1011	Support Contract 8x5		360		
1012	Support Contract 24h		0		
1013	Support Contract 1 hour SLA		360		
1014	Support Contract 2 hour SLA		300		
1015	Support Contract 3 hour SLA		120		
1016	Support Contract 4 hour SLA		480		
1017	Support Contract 5 hour SLA		240		
1018	Support Contract 6 hour SLA		1144		
1019	Support Contract 10 hour SLA		1440		
1020	Support Contract 15 hour SLA		0		
1021	Support Contract 17 hour SLA		360		
1022	Support Contract 20 hour SLA		300		
1023	Support Contract 1 day SLA		120		
1024	Support Contract 2 day SLA		480		
1025	Support Contract 3 day SLA		240		
1026	Support Contract 4 day SLA		1144		
1027	Support Contract 5 day SLA		1440		
1028	Support Contract 6 day SLA		0		
1029	General Support Contract		0		

Image 1.2.1

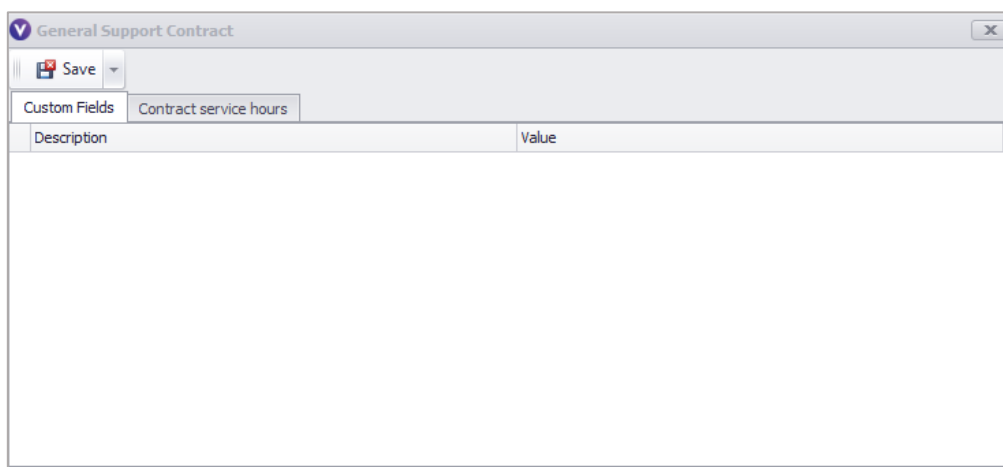
Contract number: Automatic numbering of contracts.

Contract description: Brief description of each contract.

SLA (in minutes): A predetermined Service Level Agreement. The timeframe defined for managing and solving an issue, according to the Service Agreement Level (SLA) that has been signed and agreed between the two parties.

SLA limit: The acceptable time limit/response time for implementing the SLA defined above (the time until which the SLA limit can be set).

By double-clicking on the contract number, we can view the custom fields defined in the contract as well as the **Contract service hours (Image1.2.2)**.



The screenshot shows a window titled "General Support Contract". At the top, there is a "Save" button. Below it, there is a tab labeled "Custom Fields" and a sub-tab labeled "Contract service hours". The main area of the window is a table with two columns: "Description" and "Value". The table is currently empty.

Image 1.2.2

Contract service hours: The service hours of the current contract. Workorder timeslots are updated according to the service hours defined in the contract (**FSM Module**).

How do we create a contract in a product or a customer site?

After creating a customer site along with its products, we go to the **Contracts** tab and press  to open the basic contract creation form.

Contract: Type of contract

Contract ID: The special attribute of a contract which is considered as a product ID

Remarks: Any information/special terms regarding the contract (optional)

Start date: Support contract start date

End date: Support contract end date

Active: The check box is selected if the support contract is active

Value: The cost of the support contract

Service: FSM Module

Recurrence: FSM Module

First workorder: FSM Module

Subcontractor: Optional field, in case the maintenance plan is implemented by an external collaborator.

By double-clicking on the contract (on the + icon) we have two more options:

Custom fields: Allows us to define custom fields in the customer contract. When we create a new customer contract, the following dialogue box appears: **“Do you want the values of the custom fields to be transferred from the contract...?”**

Contract documents: Allows us to attach related files (e.g. a signed contract) **Image 1.2.3**

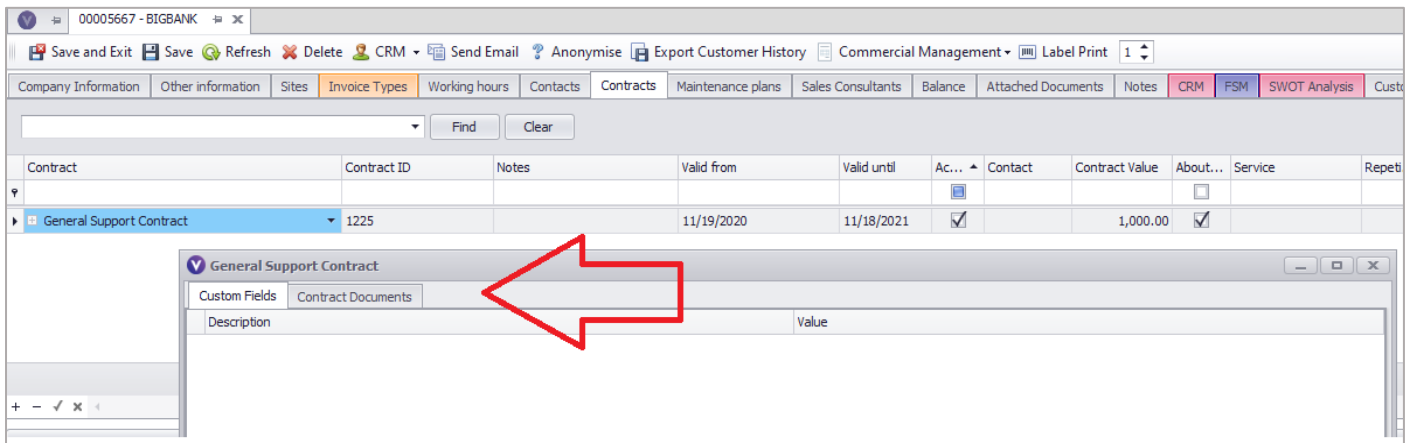


Image 1.2.3

By right-clicking on the contract that we have created the following actions will be available (**Image 1.2.4**):

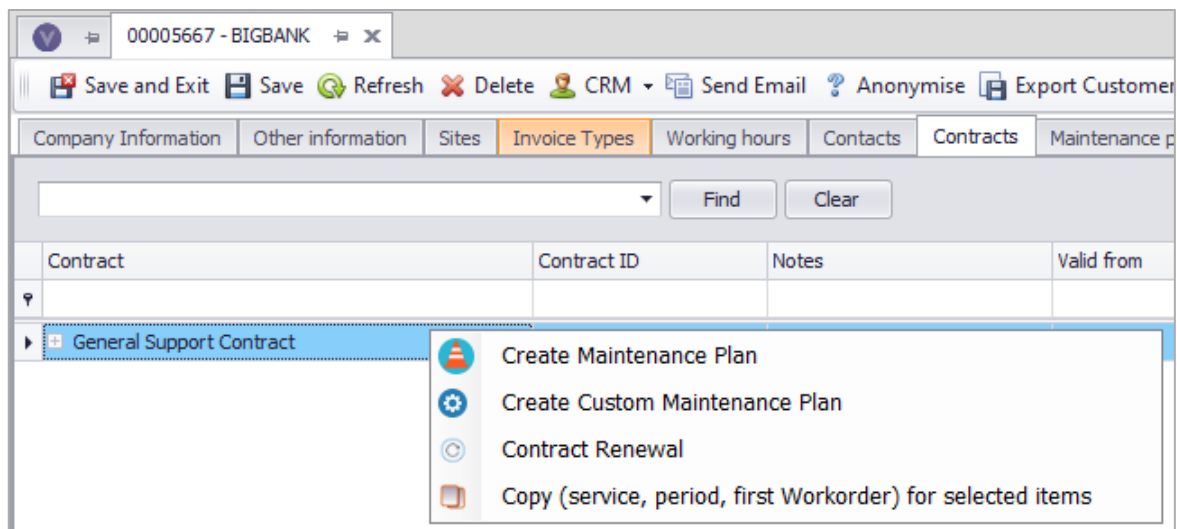


Image 1.2.4

Create a maintenance plan: Requires the **FSM Module**.

Create a custom maintenance plan: Requires the **FSM Module**.

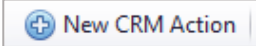
Renew contract: Allows users to renew contracts and copy any custom fields. When renewing a contract, the following dialogue box will appear: ***"Do you want the values of the custom fields to be transferred from the contract...?"***

Copy (service, recurrence, previous workorder) to selected products: Requires the **FSM Module**.

CRM ACTIONS

The action list allows users to see a detailed list of all the actions. Double-clicking on an action will show its detailed information.

How do we add a new CRM action?

We press the new entry button  to open up a tab in which we can enter any contact details/action information. This tab contains the following fields (**Image 2.1.1**):

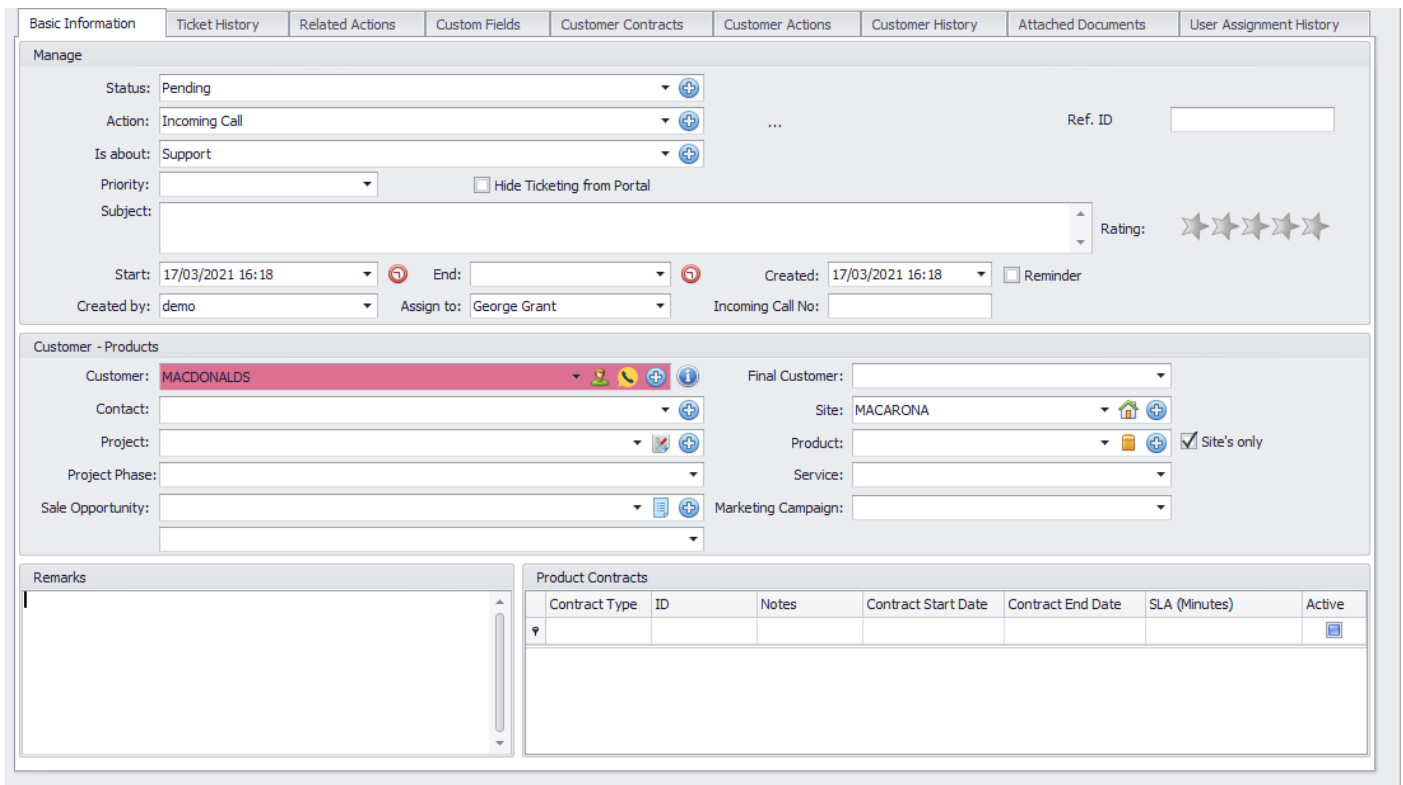


Image 2.1.1

Action status: The status of an action, which can be changed by the user

Action: Type of action (incoming, outgoing, etc.)

Refers to: The company department or activity which the job refers to

Priority: Optional field, the priority given to an action

Subject: Users may choose the subject of their message

Start/End: Users may click on the icon to define the start and end date/time of the event

Created by: Designates the user/originator that created the action. The originator is the one who received the call and the user is the one who will ultimately handle the issue

Assigned to: The user to whom the action has been assigned/who will handle the action

Incoming call number: The phone number from which the customer called. If the program is connected to a call centre with a caller ID, the phone number field will be automatically filled in

Customer: The trader associated to the action. By clicking on this icon  the program helps us view the contracts (active and inactive) that the customer has concluded with the company (**Image 2.1.2**)

Image 2.1.2

Contact: The contact to which the action refers

Project: Optional field, if the action is linked to a customer project

Quote: Optional field, if the action is linked to a customer quote

Opportunity: Optional field, if a sales opportunity is linked to the specific action

Site: The customer site with which the action is associated

Product: The customer product with which the action is associated

Service: The customer service with which the action is associated

Marketing campaign: The marketing campaign with which the action is associated

Reminder: Reminders that can be set up for a specific job or call

Notes: Notes, summary of an action

Contract: All contracts based on which a particular action is carried out. When selecting a contract, the system proposes those contracts that are active. Inactive contracts are displayed in red.

In the end, we save the action by pressing the SAVE button on the taskbar.

Save and exit: Saves and closes the current tab.

Save: Saves the action or any changes that have been made

Delete: Deletes the action

Relate to: All actions can be related together, allowing for an Action History to be created (**Image 2.1.3**). How to relate actions:

Image 2.1.3

The **Relate to** button recommends the actions/steps that can be related as a follow-up to the specific action. The new action that has been selected automatically opens up a new tab (action, quote, meeting).

The actions that have been related to each other are depicted in a tree form. Relating actions helps to fully monitor the progress of an action.

Refresh: Refreshes the contents of an action

Delete read receipt: Requires the **PORTAL CUSTOMERS** Module

Send email to customer: Requires the **WEB PORTAL CUSTOMERS** Module

Send email to us: Requires the **WEB PORTAL CUSTOMERS** Module

Action follow-up: Allows users to schedule their next action. After selecting the action they want to reschedule, users need to fill in the Follow-up date (e.g. when they want to schedule the next communication-outgoing call with a prospective client) and the system will automatically create a new pending action with the same information (action/assigned to/customer/site, etc.). (Images 2.1.4, 2.1.5)

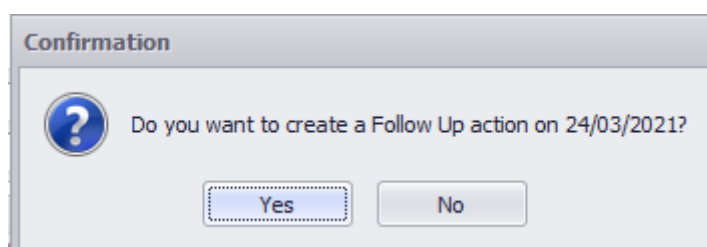


Image 2.1.4

Action List

New CRM Action

From: 1/1/2020

To: 4/10/2021

Current User Actions

Status:

Submit

Show All

Indication for duration longer than: 15

hours

Select template:

Image 2.1.5

Send SMS/Email: Sends email to a trader contact from within the application (Image 2.1.6).

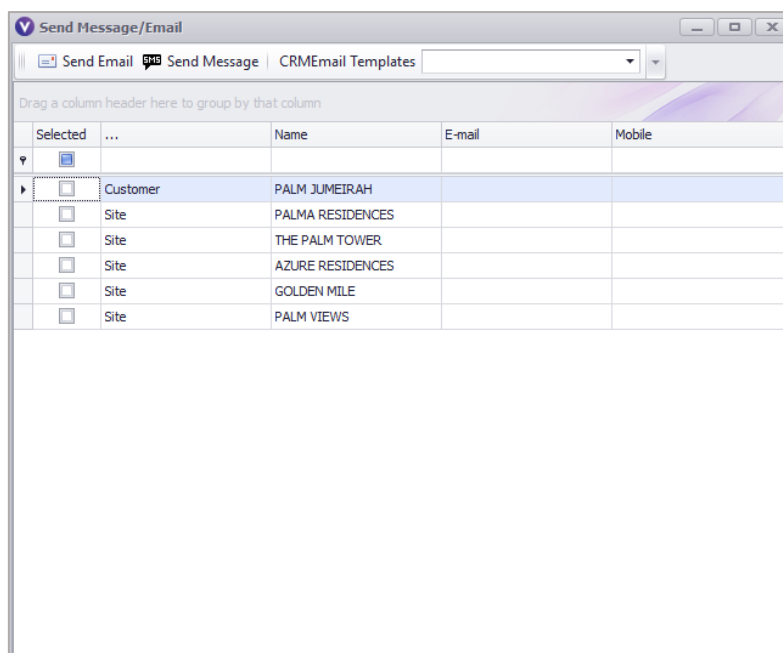


Image 2.1.6

Each action tab is organized into six tabs:

Related actions: The actions that have been related to the current action

Custom fields: The customer custom fields that we have created in **Settings** -> Parameters -> Custom Fields (Image 2.1.7)

Application Settings	Workorder Settings	Customer Settings	Inventory Settings	Company Settings	Email settings	CRM Settings	Invoicing Settings	Mobile Devices	Security Settings	API Settings	Web Portal Settings	Advanced Settings	Custom Fields	External Applications	Project Settings	Google Settings
Field Description	Data Type	Table	Show on Web Service	Mandatory	Mandatory to Portal	Sorting	Editable	First Screen view	Colour	Show cost analysis in Service Report	Read-only					
test	Alphanumeric	Sites	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Hired Date	Alphanumeric	Technicians	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Priority	Alphanumeric	Workorders	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Preferred Visit Day	Date/Time	Workorders	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Type	Alphanumeric	Workorders	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Image 2.1.7

Customer contracts: Shows all customer contracts that have been added

Customer actions: Shows all actions created for the specific customer. Double-clicking will open the action's tab with all its information

Customer History: Requires the **FSM** Module

Attached Documents: The documents that have been linked to a customer action

SEARCH ACTIONS

Filters are placed at the top of the screen to help users easily search for an action (e.g. if we want to see only those actions that are in progress, we must select the "In progress" status).

The * and ? symbols are used in a search to include all possible endings of a word or to replace a character (Image 2.1.8).

New CRM Action From: 1/1/2020 To: 3/17/2021 Current User Actions Status: Submit Show All Indication for duration longer than: 15

Select template: Send Mass E-mail Actions with no activities the last 0 hours

Drag a column header here to group by that column

Action Type	Customer	Site	Subject	Action Start	Duration (min)	Action End	Status	Created by	Assign to	Service	Site
Outbound Call	JOHN SMIT...	ΓΙΩΡΓΟΣ Π...	Action 'JOHN SMITH & CO'	3/20/2020 1:08 PM			Completed	1	John Cooper		
Incoming Call	JOHN SMIT...	ΓΙΩΡΓΟΣ Π...	Action 'JOHN SMITH & CO'	3/20/2020 1:06 PM			Completed	1			
Outbound Call	PALM JUME...	AZURE RES...	Follow Up 'Follow Up 'Quote 'PALM JUMEIRAH'	1/31/2020 12:00 AM			Completed	1			
Outbound Call	PALM JUME...	AZURE RES...	Follow Up 'Quote 'PALM JUMEIRAH'	1/26/2020 12:00 AM			Completed	1			
Customer Acceptance	PALM JUME...	AZURE RES...	Action 'PALM JUMEIRAH'	1/13/2020 6:29 PM			Completed	1			
Inquiry to Supplier	PALM JUME...	AZURE RES...	Action 'PALM JUMEIRAH'	1/13/2020 5:36 PM			Completed	1			
Incoming Call	PALM JUME...	AZURE RES...	Action 'PALM JUMEIRAH'	1/13/2020 5:33 PM	1	1/13/2020 ...	Completed	1	George Bruce		
Incoming Call	PALM JUME...	AZURE RES...	Action 'PALM JUMEIRAH'	1/13/2020 5:30 PM	2	1/13/2020 ...	Completed	1			

Image 2.1.8

Depending on the action's status, its colour code also changes. The colours are chosen by users in Settings -> Parameters -> CRM Settings -> Action Status (Image 2.1.9).

Settings Save and Exit Save

Application Settings Workorder Settings Customer Settings Inventory Settings Company Settings Email settings CRM Settings Invoicing Settings Mobile Devices Security Settings API Settings Web Portal Settings Advanced Settings Custom Fields External Applications Project Settings Google Settings

General CRM Settings Countries - States Namedays Action Reason Action Status Meetings Reasons Meeting Status Customer Contact Roles Customer Departments Customer Industry Customer Sectors Customer Source of Origin Customer Status

Terms of Payment Quote Source of Origin Actions Types Quote Types Types of Meetings Quote Status Marketing Campaign Status Marketing Campaign Media Sales Opportunity Status Document Categories Ticketing Settings Priorities Standard Email CRM Quote Print Settings

Drag a column header here to group by that column

Active	Action Description	Image	Action Type	Completed Action (Utilization report)	Pending Action (Utilization report)
☒	Incoming Call		Incoming call	☒	☒
☒	Outbound Call		Incoming call	☒	☒
☒	Task		Work	☒	☒
☒	Email		Work	☒	☒
☒	Complaint statement		Incoming call	☒	☒
☒	Inquiry to Supplier		Work	☒	☒
☒	Customer Acceptance		Work	☒	☒

Image 2.1.9

ACTIONS TEMPLATES

Creating actions templates helps users find actions faster.

How do we create an action template?

We select the desired criteria (type of action, assigned to, status) in order to create the template content, we press the Save button  and we enter a title (a brief description) of the template (Image 2.1.10).

Template Name

Save

Image 2.1.10

Once we have created our action template, we will be able to select it from the list of templates (**Image 2.1.11**) .

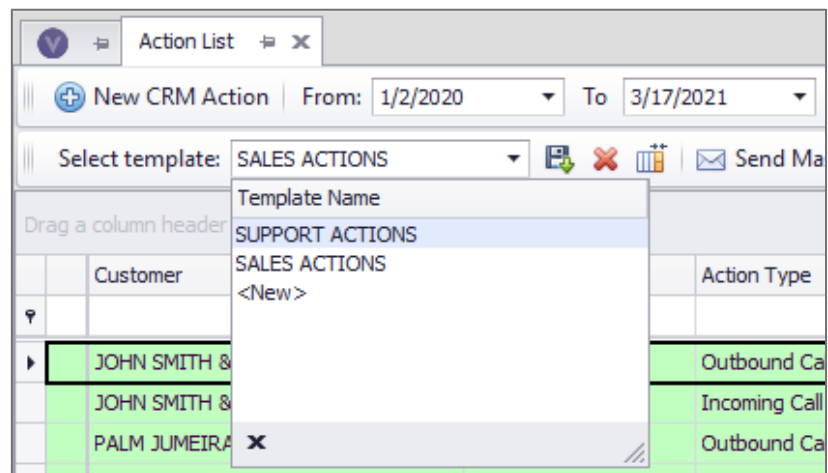


Image 2.1.11

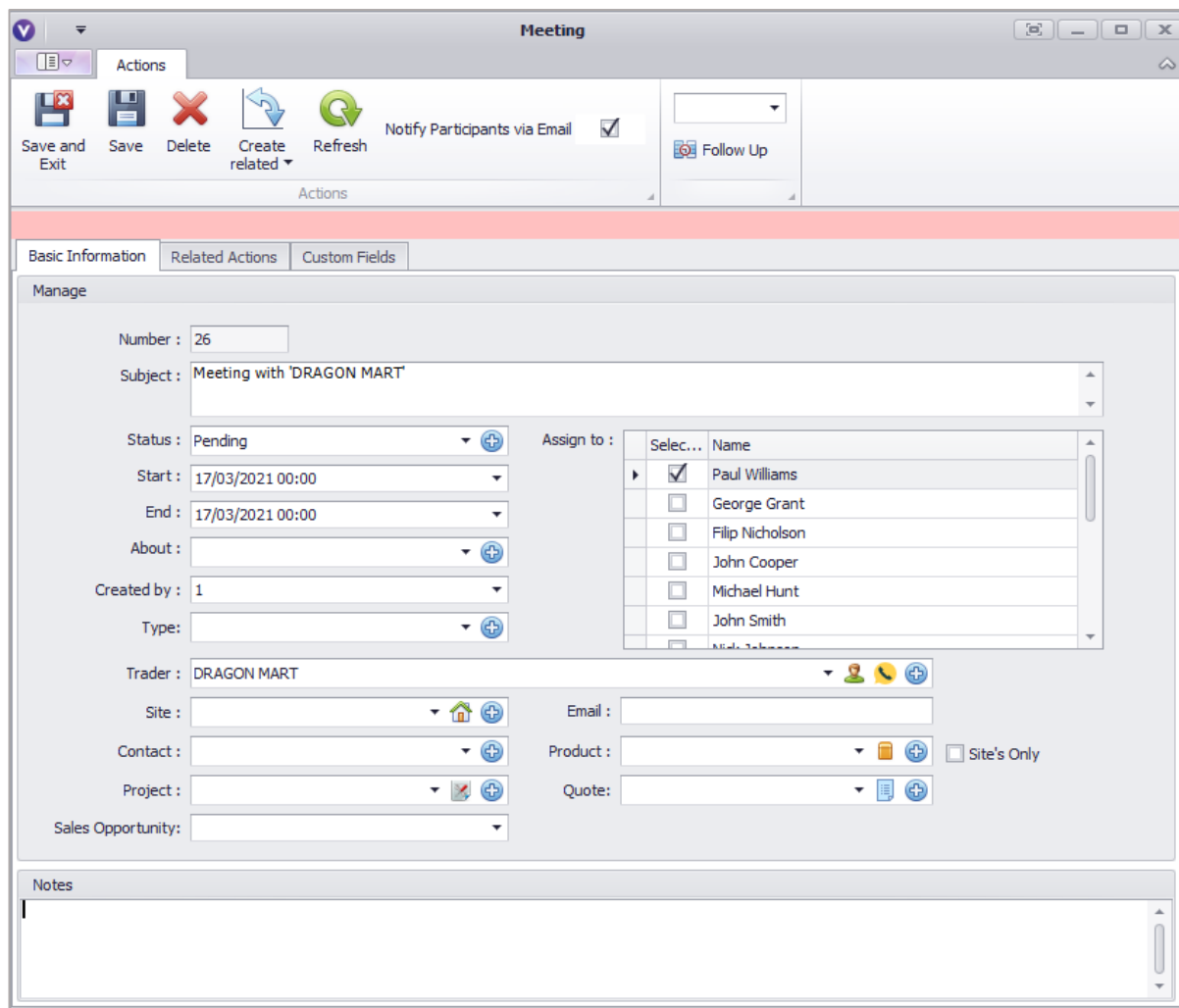
MEETINGS

This feature helps us to easily set up a meeting. By double-clicking on the Meetings list, we can go to any activity/meeting and view its information.

How do we create a new meeting?

We select **<New Entry>** and fill in the following information that appears in the editing tab (**Image 2.2.1**):

- Topic of the meeting (topic description)
- Start/End date and time of the meeting
- Status of the meeting
- Trader information (customer, supplier and/or partner)
- Project (optional, if the meeting involves the project of a trader)
- Created by: The name of the user who has created the meeting is automatically filled in. The originator is the one who has entered the action and the user is the one who will hold the meeting
- Assigned to: The user who will hold the meeting
- Direction (meeting inside/outside the company)
- Participants to the meeting: Participants may be internal or external parties (employees-contacts). Entering the participants creates as many actions as there are users-persons who will participate. Each Meeting action will have the respective user/participant as its user.



The screenshot shows the 'Meeting' form in Vortex CRM. The form is divided into several sections:

- Actions:** Contains buttons for 'Save and Exit', 'Save', 'Delete', 'Create related', 'Refresh', and a checkbox for 'Notify Participants via Email'.
- Basic Information:** Contains fields for 'Number' (26), 'Subject' (Meeting with 'DRAGON MART'), 'Status' (Pending), 'Start' (17/03/2021 00:00), 'End' (17/03/2021 00:00), 'About', 'Created by' (1), 'Type', 'Trader' (DRAGON MART), 'Site', 'Contact', 'Project', 'Sales Opportunity', 'Email', 'Product', 'Quote', and a list of participants (Paul Williams, George Grant, Filip Nicholson, John Cooper, Michael Hunt, John Smith).
- Related Actions:** Contains a 'Follow Up' button.
- Custom Fields:** Contains a 'Notes' section.

Image 2.2.1

We can define the duration of the meeting in **Settings** -> Parameters -> CRM Settings -> Default meeting duration (Image 2.2.2).

The screenshot shows the 'Settings' window with the 'CRM Settings' tab selected. Under the 'General CRM Settings' section, there are several checkboxes for various CRM actions. At the bottom, there are three input fields for time durations: 'Message for CRM Action longer energy than : 0 minutes', 'Check for reminder overview every 0 ms', and 'Default meeting duration: 0 minutes'. The 'Default meeting duration' field is highlighted with a red rectangular box.

Image 2.2.2

Press Save to create the meeting.

The colours of the meeting will change according to its status (pending/postponed/completed, etc.). We can select the colours in **Settings** -> Parameters -> CRM Settings -> Meeting Types.

Meetings are automatically transferred to the **Calendar**. The calendar also displays the meetings that have been cancelled or postponed. Meetings appear in the calendars of all participants (Image 2.2.3).

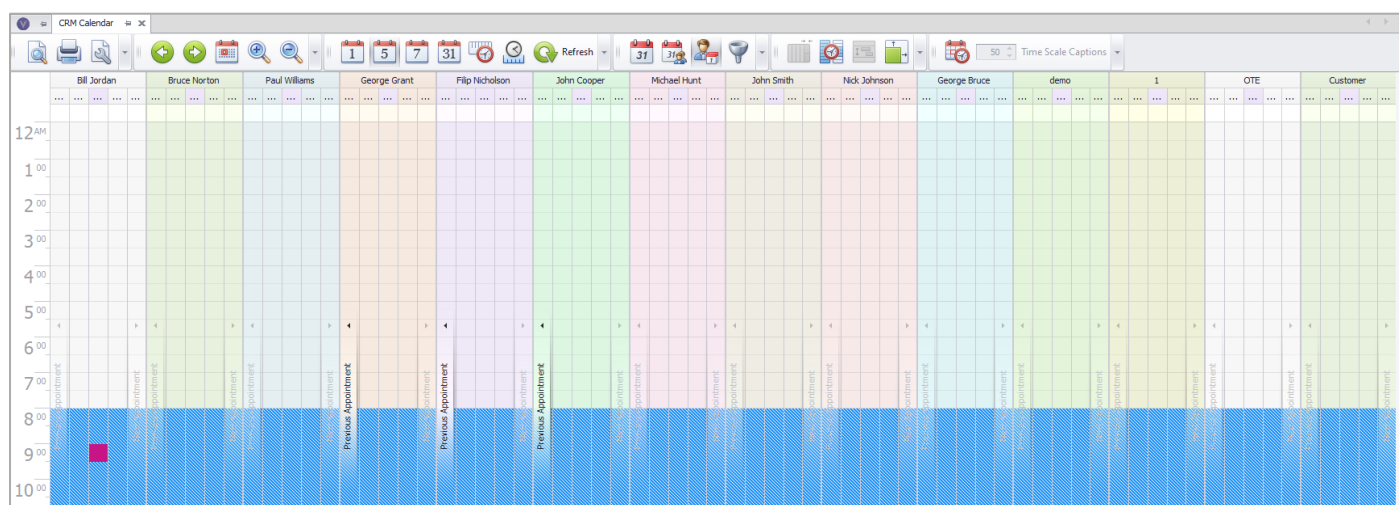


Image 2.2.3

Double-clicking on a meeting in the Calendar will open the edit tab.

Once the Meeting has been entered, an email is sent to the users to whom the meeting has been assigned

Users may also set an automated reminder. In **Settings** -> Parameters -> General CRM Settings, we can define the number of minutes prior to the meeting that we want Outlook to display a pop-up reminder. (Image 2.2.4)

Application Settings	Workorder Settings	Customer Settings	Inventory Settings	Company Settings	Email settings	CRM Settings
Terms of Payment	Quote Source of Origin	Actions Types	Quote Types	Types of Meetings	Quote Status	
General CRM Settings		Countries - States	Namedays	Action Reason	Action Status	Meetings Re

☒ Show only site Products
 ☐ Show "Today" on Home screen

☐ Go to CRM actions on clicking the call Pop Up
 ☐ Autocomplete "Assign To" if empty during sa

☐ Confirmation when creating related objects
 ☐ Reminder set only to the user the CRM action

☒ Send a reminder email on meeting creation
 ☐ Deactivation of reminders

☐ Question about sending e-mail to CRM action storage
 ☐ View only selected client actions in the relate

☐ Enable CRM action Dispute Process

Message for CRM Action longer energy than : minutes

Check for reminder overview every ms

Default meeting duration: minutes

Image 2.2.4

The **Relate to** button at the top of the tab shows all the actions that can be related to the meeting that has been created. This way, the actions created are flow-based, provided they have a temporal sequence (e.g. phone call after the appointment). Image 2.2.

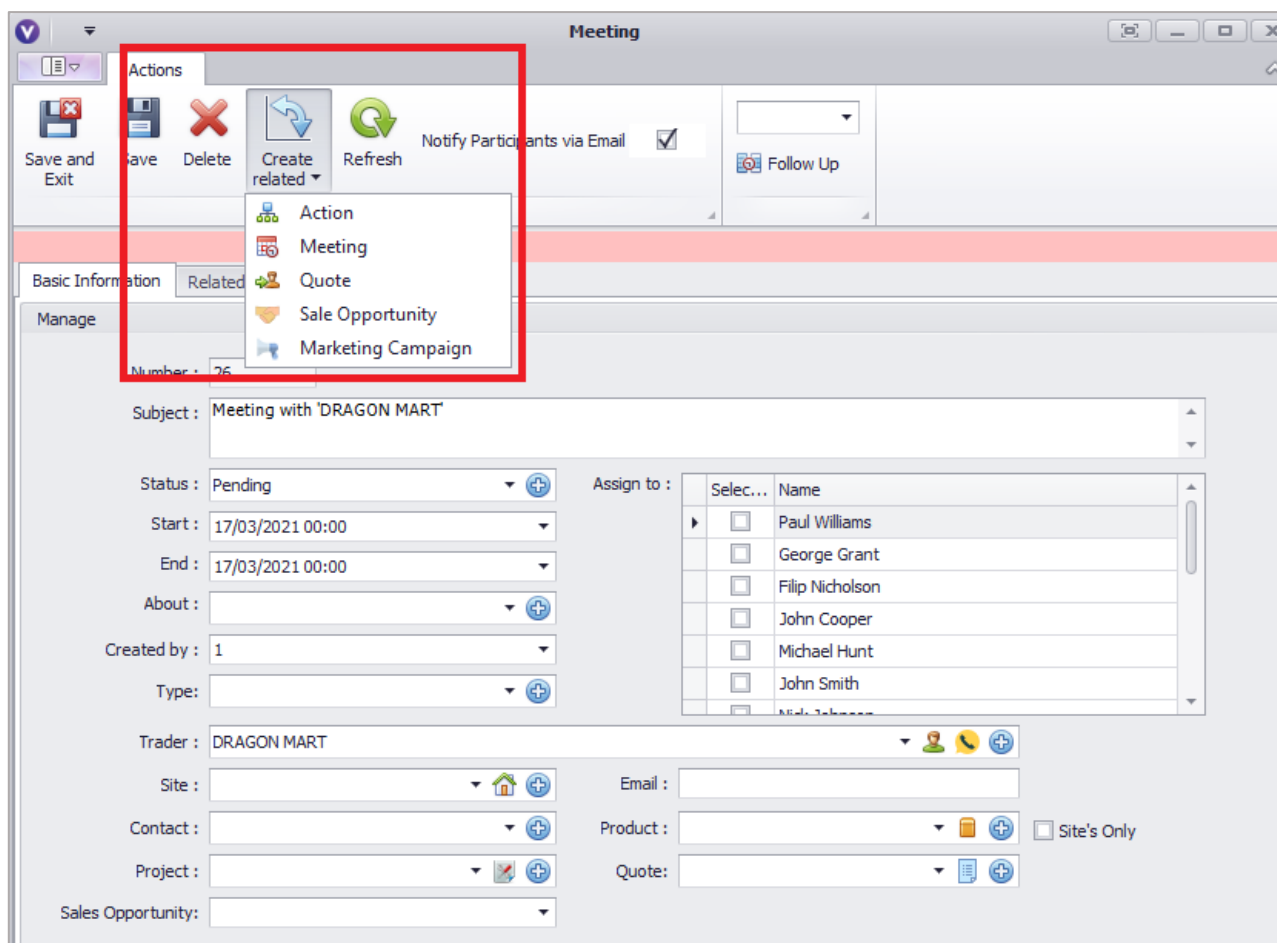


Image 2.2.5

To delete a meeting, simply press the **Delete** button at the top of the tab.

SALES OPPORTUNITIES

In Vortex CRM, each prospective client may represent a new sales opportunity. This helps users manage the entire cycle of a potential sale. An opportunity may evolve into a quote to the customer, or may not progress for various reasons.

How do we create a new sales opportunity?

From the menu, we select Sales Opportunities -> **New Entry**, which opens the following editing tab (**Image 2.3.1**):

Image 2.3.1

Here we can fill in all the information that we want (customer, point of sale, product, sales lead, marketing campaign, etc.).

Once we save the sales opportunity, the Trader tab is also updated, in the field **CRM** -> **Sales Opportunity** (**Image 2.3.2**).

Title	Status	Date Created	Possible Completion Date	Site	Product	Site Pro
Sales Opportunity 'MACDONALDS'	PENDING	3/19/2021	3/28/2021	MACARONA	HP Deskjet 4260	

Image 2.3.2

A sales opportunity can be linked to **1.** a CRM action, **2.** a meeting, **3.** a quote. The resources and actions required to manage the sales cycle are accordingly added to the Related Actions (**Image 2.3.3**).

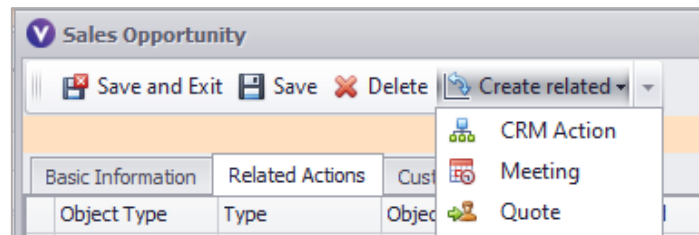
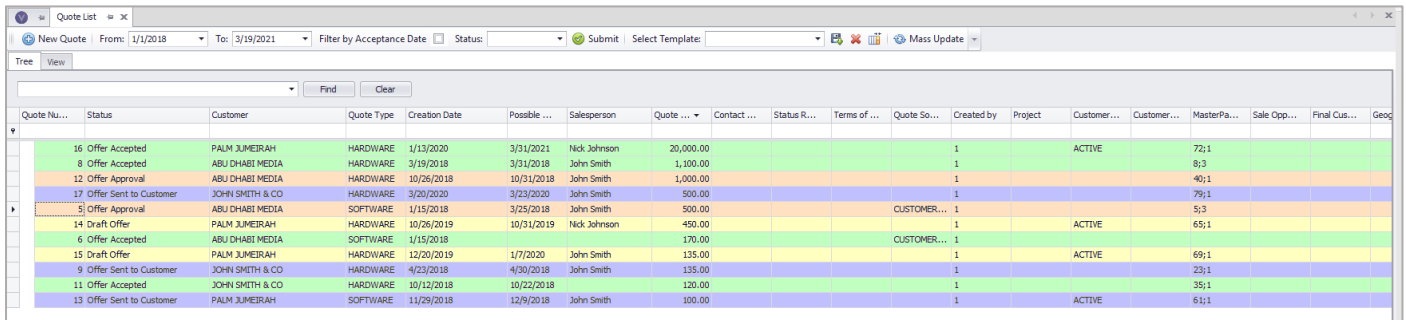


Image 2.3.3

QUOTES

Users can easily create a sales quote setting out the details of the prospective client, the details of the quote (quote number, date, name of the prospective customer, quote value) as well as the goods/products that are part of it (**Image 2.4.1**).

Quotes management allows us to have a detailed overview of the effort we have made to win a prospective client. By opening the list of sales quotes we can see all the information related to the (prospective) customer, the date, the value, the type, the salesperson, the expected date of acceptance and the status of all quotes that involve the specific customer.



Quote No.	Status	Customer	Quote Type	Creation Date	Possible ...	Salesperson	Quote ...	Contact ...	Status R...	Terms of ...	Quote So...	Created by	Project	Customer...	Customer...	MasterPa...	Sale Opp...	Final Cus...	Geo
16	Offer Accepted	PALM JUMEIRAH	HARDWARE	1/13/2020	3/31/2021	Nick Johnson	20,000.00				1			ACTIVE		72:1			
8	Offer Accepted	ABU DHABI MEDIA	HARDWARE	3/19/2018	3/31/2018	John Smith	1,100.00				1					8:3			
12	Offer Approval	ABU DHABI MEDIA	HARDWARE	10/26/2018	10/31/2018	John Smith	1,000.00				1					40:1			
17	Offer Sent to Customer	JOHN SMITH & CO	HARDWARE	3/20/2020	3/23/2020	John Smith	500.00				1					79:1			
5	Offer Approval	ABU DHABI MEDIA	SOFTWARE	1/15/2018	3/25/2018	John Smith	500.00				CUSTOMER...	1				5:3			
14	Draft Offer	PALM JUMEIRAH	HARDWARE	10/26/2019	10/31/2019	Nick Johnson	450.00				1			ACTIVE		65:1			
6	Offer Accepted	ABU DHABI MEDIA	SOFTWARE	1/15/2018			170.00				CUSTOMER...	1							
15	Draft Offer	PALM JUMEIRAH	HARDWARE	12/20/2019	1/7/2020	John Smith	135.00				1			ACTIVE		69:1			
9	Offer Sent to Customer	JOHN SMITH & CO	HARDWARE	4/23/2018	4/30/2018	John Smith	135.00				1					23:1			
11	Offer Accepted	JOHN SMITH & CO	HARDWARE	10/12/2018	10/22/2018		120.00				1					35:1			
13	Offer Sent to Customer	PALM JUMEIRAH	SOFTWARE	11/29/2018	12/9/2018	John Smith	100.00				1			ACTIVE		61:1			

Image 2.4.1

How do we create a new quote?

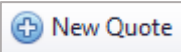
From the Quotes list, we select  which opens the following editing tab (**Image 2.4.2**):

Image 2.4.2

Quote number: Automatic numbering of quotes.

We fill in all the necessary information pertaining to the quote (type, title, customer, site, etc.).

Quote document: Allows users to attach the quote document (Excel or Pdf file). By pressing + users search for the file they want to upload from their computer. If the file has been saved in a shared folder, we also allow the other users to read or edit the document.

Pressing the magnifying glass icon  will open the file.

Pressing the delete button  will remove the attachment.

The fields in which the  icon appears allows users to open a new Customer/Site/ Contact that does not yet exist.

Quote Items: The items/products of a quote along with their quantities, sales prices and discounts, are added here.

The quote is saved by pressing Save and Exit/Save.

Related actions: Actions that have been related to a specific quote (Actions, Events).

In the subtab **Attached Documents** we can attach documents that are related to the price quote.

Custom fields: The quote parameters that we define in **Settings** -> Parameters -> Custom Fields.

SEARCH QUOTES

At the top of the screen, there are filters that help users quickly find the quote they are looking for (**Image 2.4.3**).

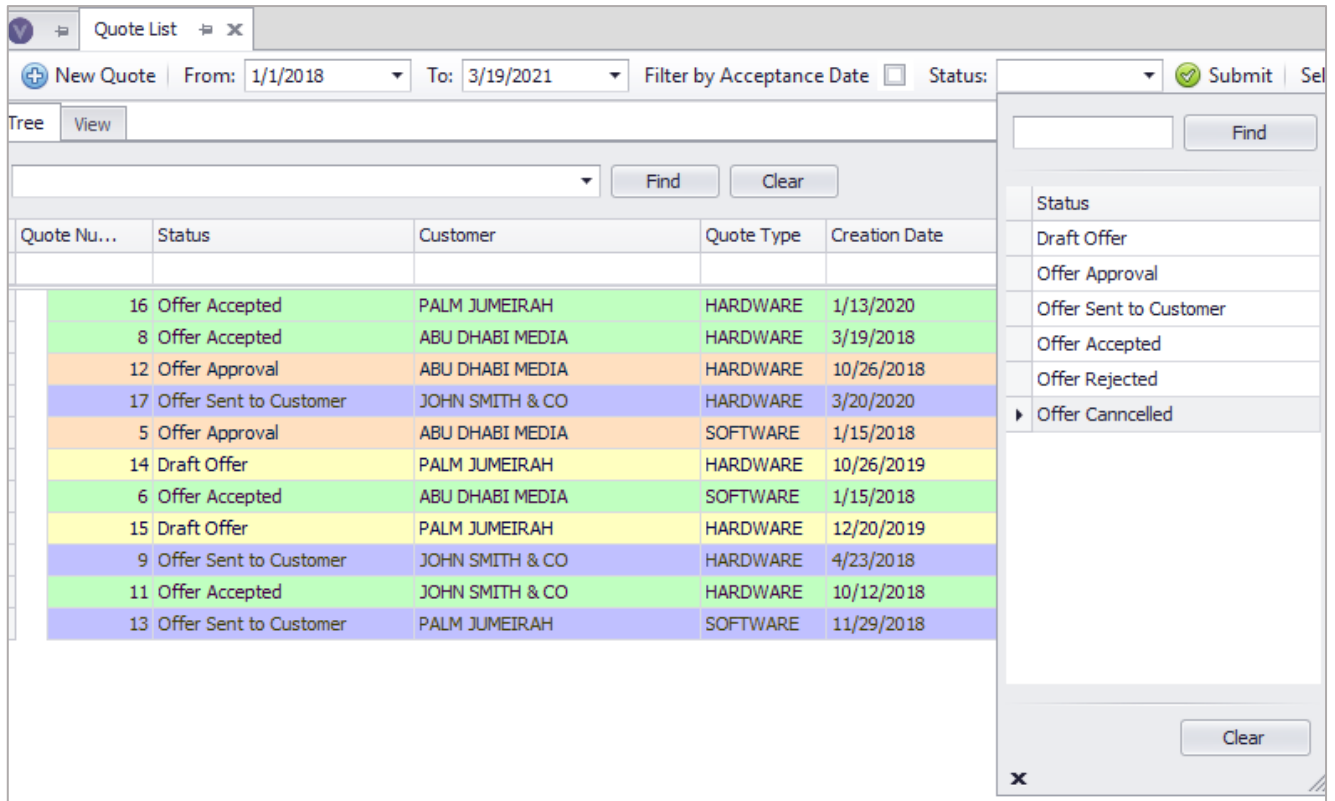


Image 2.4.3

The % and ? symbols are used when searching in order to include all possible endings of a word or to replace a character.

Depending on the quote status, the colour code of the entry also changes. The colours are chosen by users in Settings -> Parameters -> CRM Settings -> Quote Status (**Image 2.4.4**).

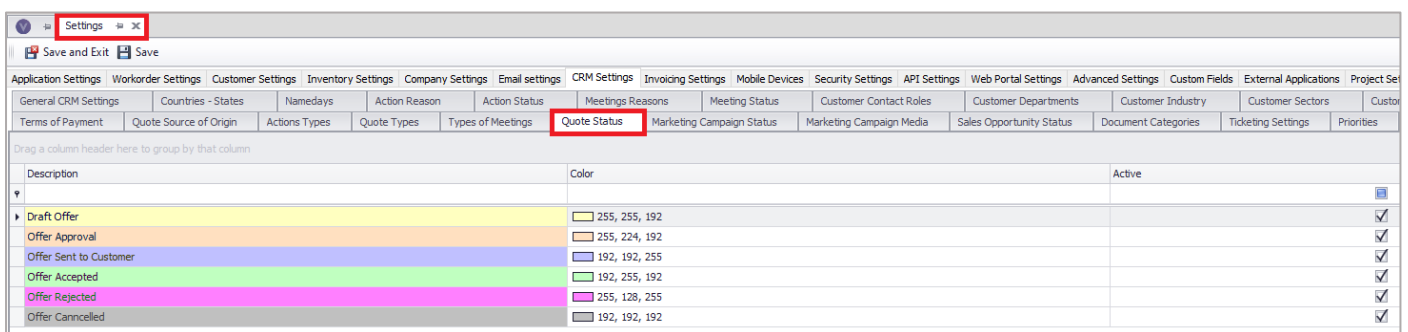


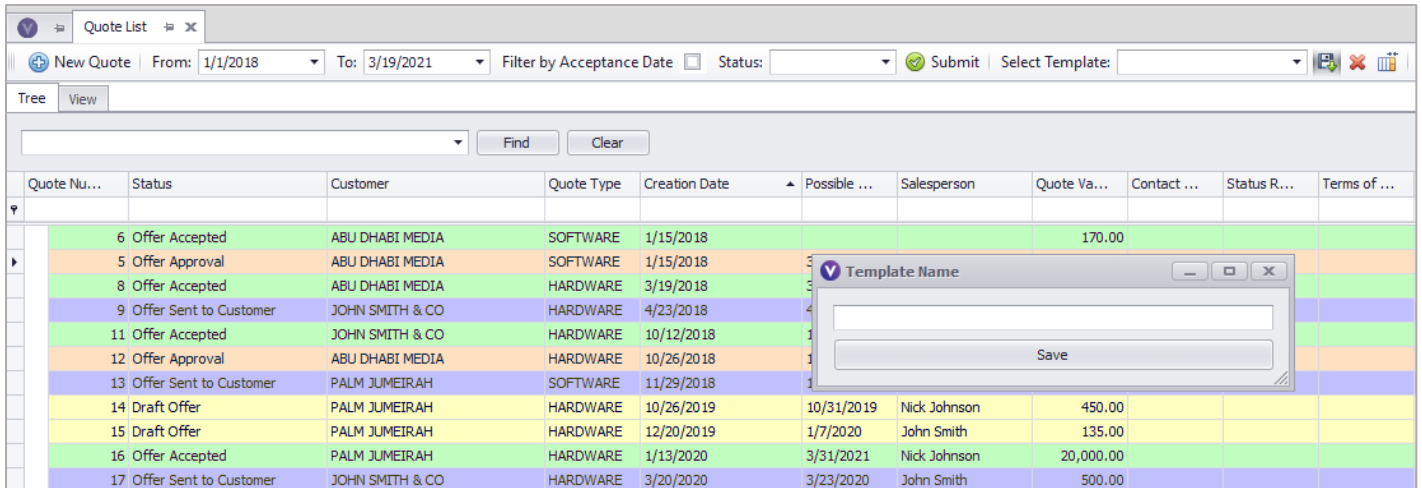
Image 2.4.4

QUOTES TEMPLATES

The creation of quotes templates helps users find quotes faster.

How do we create a quote template?

We select the desired criteria (e.g. quote status) to create the template content, we press the Save button  and enter a title (a brief description) of the template (**Image 2.4.5**).

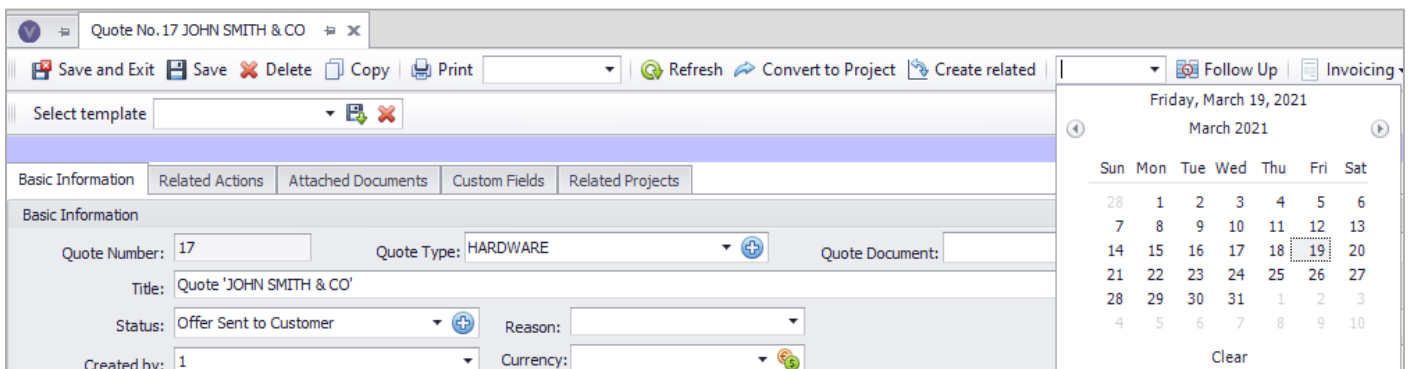


Quote Nu...	Status	Customer	Quote Type	Creation Date	Possible ...	Salesperson	Quote Va...	Contact ...	Status R...	Terms of ...
6	Offer Accepted	ABU DHABI MEDIA	SOFTWARE	1/15/2018			170.00			
5	Offer Approval	ABU DHABI MEDIA	SOFTWARE	1/15/2018						
8	Offer Accepted	ABU DHABI MEDIA	HARDWARE	3/19/2018						
9	Offer Sent to Customer	JOHN SMITH & CO	HARDWARE	4/23/2018						
11	Offer Accepted	JOHN SMITH & CO	HARDWARE	10/12/2018						
12	Offer Approval	ABU DHABI MEDIA	HARDWARE	10/26/2018						
13	Offer Sent to Customer	PALM JUMEIRAH	SOFTWARE	11/29/2018						
14	Draft Offer	PALM JUMEIRAH	HARDWARE	10/26/2019	10/31/2019	Nick Johnson	450.00			
15	Draft Offer	PALM JUMEIRAH	HARDWARE	12/20/2019	1/7/2020	John Smith	135.00			
16	Offer Accepted	PALM JUMEIRAH	HARDWARE	1/13/2020	3/31/2021	Nick Johnson	20,000.00			
17	Offer Sent to Customer	JOHN SMITH & CO	HARDWARE	3/20/2020	3/23/2020	John Smith	500.00			

Image 2.4.5

QUOTE FOLLOW-UP

Depending on the quote status we can create a follow-up action to ensure that it is efficiently managed. We enter the Follow-up date (e.g. when we want to schedule the next communication-outgoing call with a prospective client) and the system automatically creates a new pending action with the exact same information (type of action/assigned to/customer/site, etc.). **Image 2.4.6**



Quote No. 17 JOHN SMITH & CO

Save and Exit Save Delete Copy Print Refresh Convert to Project Create related

Select template

Basic Information Related Actions Attached Documents Custom Fields Related Projects

Basic Information

Quote Number: 17 Quote Type: HARDWARE Quote Document:

Title: Quote 'JOHN SMITH & CO'

Status: Offer Sent to Customer Reason:

Created by: 1 Currency:

Follow Up Invoicing

Friday, March 19, 2021

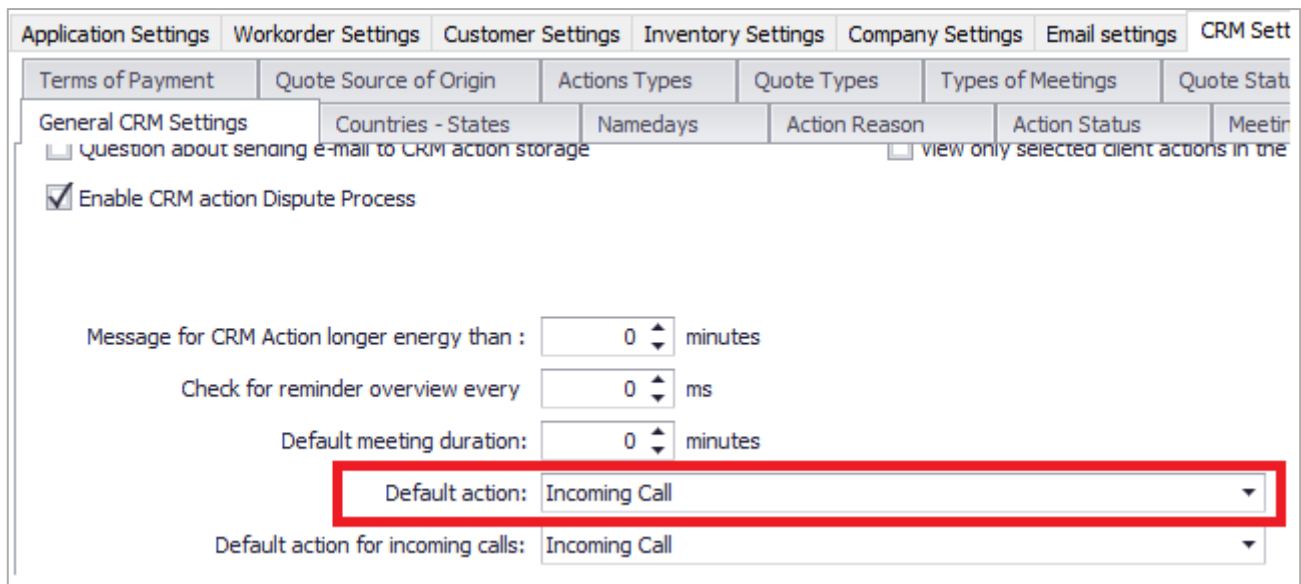
March 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Clear

Image 2.4.6

We can set a default follow-up action in **Settings** -> General CRM Settings. **Image 2.4.7**



Application Settings | Workorder Settings | Customer Settings | Inventory Settings | Company Settings | Email settings | CRM Settings

Terms of Payment | Quote Source of Origin | Actions Types | Quote Types | Types of Meetings | Quote Status

General CRM Settings | Countries - States | Namedays | Action Reason | Action Status | Meeting

☐ Question about sending e-mail to CRM action storage ☐ view only selected client actions in the

☒ Enable CRM action Dispute Process

Message for CRM Action longer energy than : minutes

Check for reminder overview every ms

Default meeting duration: minutes

Default action: **Incoming Call**

Default action for incoming calls: **Incoming Call**

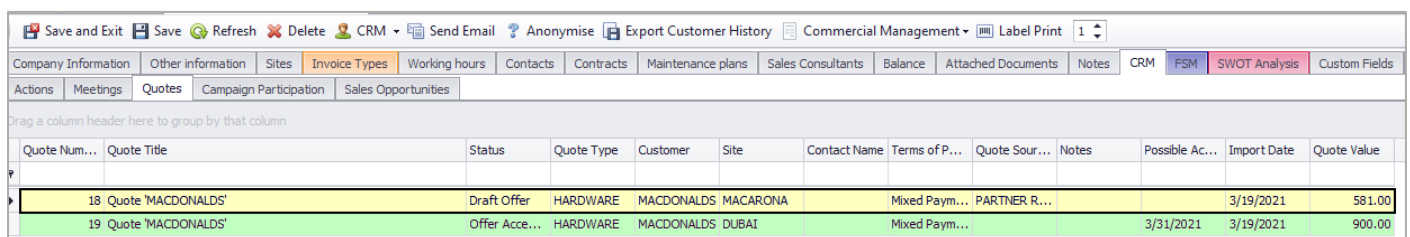
Image 2.4.7

Our aim is for all quotes to come to some final conclusion, either by being converted to a project or by being cancelled. In the latter case, the reason for the cancellation may be entered (in Custom Fields) in order to use this information to draw useful business conclusions.

Convert quote to project: Requires the **FSM** Module.

QUOTE HISTORY

The Trader tab (**CRM** -> **Quotes**) contains the history of all quotes submitted to the customer. **Image 2.4.8**

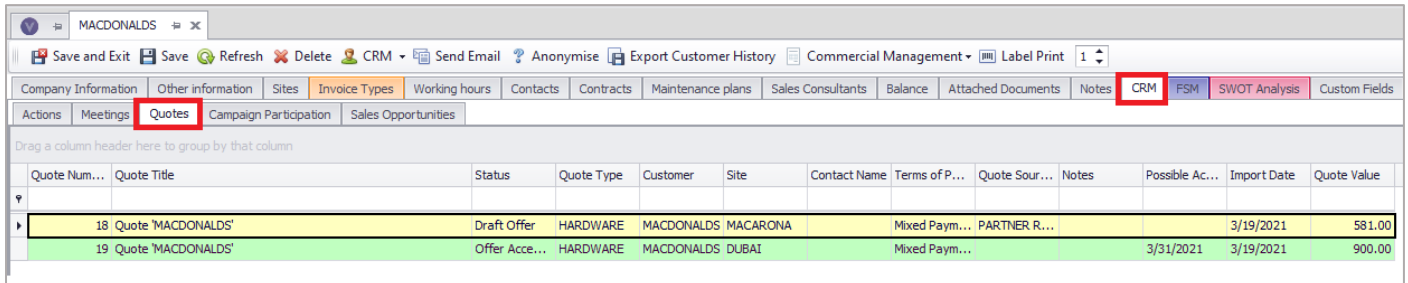


Quote Num...	Quote Title	Status	Quote Type	Customer	Site	Contact Name	Terms of P...	Quote Sour...	Notes	Possible Ac...	Import Date	Quote Value
18	Quote 'MACDONALDS'	Draft Offer	HARDWARE	MACDONALDS	MACARONA		Mixed Paym...	PARTNER R...			3/19/2021	581.00
19	Quote 'MACDONALDS'	Offer Acce...	HARDWARE	MACDONALDS	DUBAI		Mixed Paym...				3/31/2021	900.00

Image 2.4.8

CALENDAR

The Vortex CRM Module helps users keep track of their tasks and meetings in the Calendar using the MS Outlook environment and filter them by employee, date, etc. So when users create a meeting, an action or a quote, these are automatically displayed in the Calendar. (Image 2.5.1)



Quote Num...	Quote Title	Status	Quote Type	Customer	Site	Contact Name	Terms of P...	Quote Sour...	Notes	Possible Ac...	Import Date	Quote Value
18	Quote 'MACDONALDS'	Draft Offer	HARDWARE	MACDONALDS	MACARONA		Mixed Paym...	PARTNER R...			3/19/2021	581.00
19	Quote 'MACDONALDS'	Offer Acce...	HARDWARE	MACDONALDS	DUBAI		Mixed Paym...				3/31/2021	900.00

Image 2.5.1

By double-clicking on an activity, we can view all the items scheduled on a specific date.

How do we create a new meeting/action/quote from the Calendar?

We select the date and right click to create a new meeting/action/quote (Image 2.5.2).

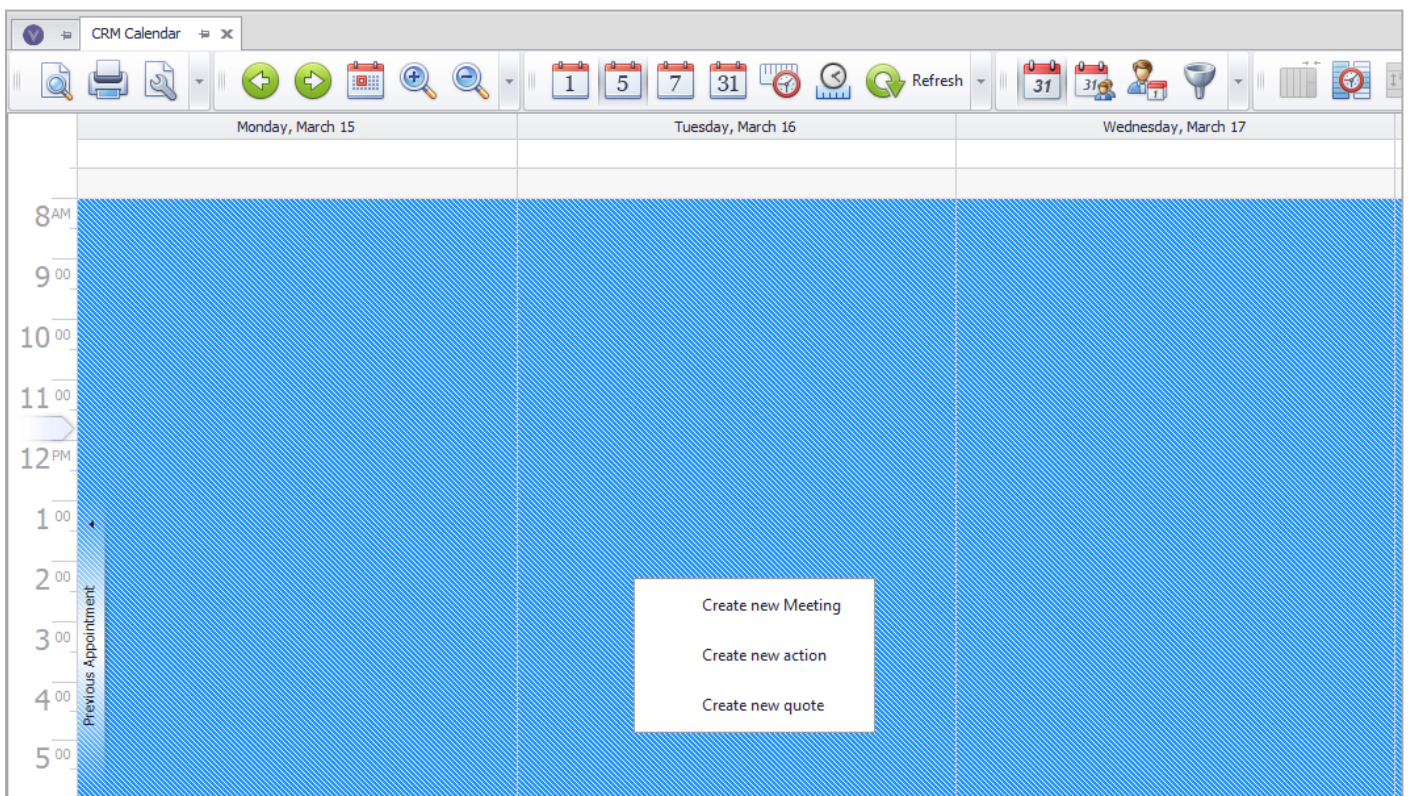


Image 2.5.2

We press **Save and Exit** at the top of the tab to save the new entry. (Image 2.5.3)

Image 2.5.3

When users hover over an entry, information is displayed about the trader and the site of the activity. (Image 2.5.4)

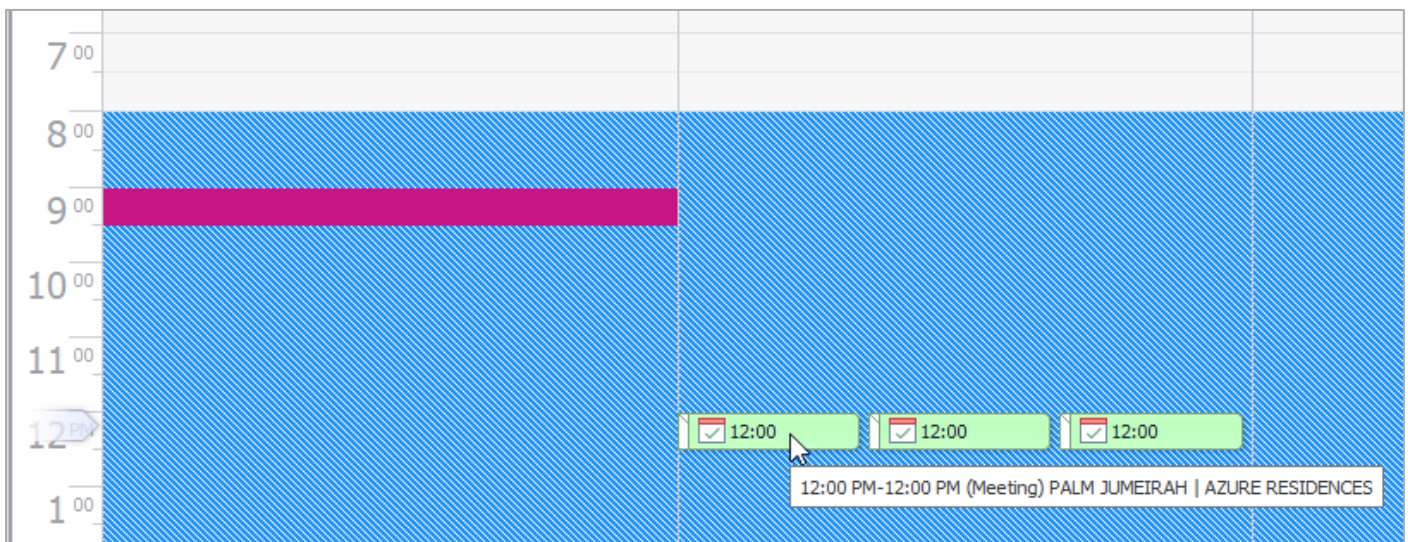


Image 2.5.4

At the top of the screen, the following icons are available:



Calendar print preview



Print the calendar



Page Setup box, where users can adjust and set their printing preferences (**Image 2.5.5**)

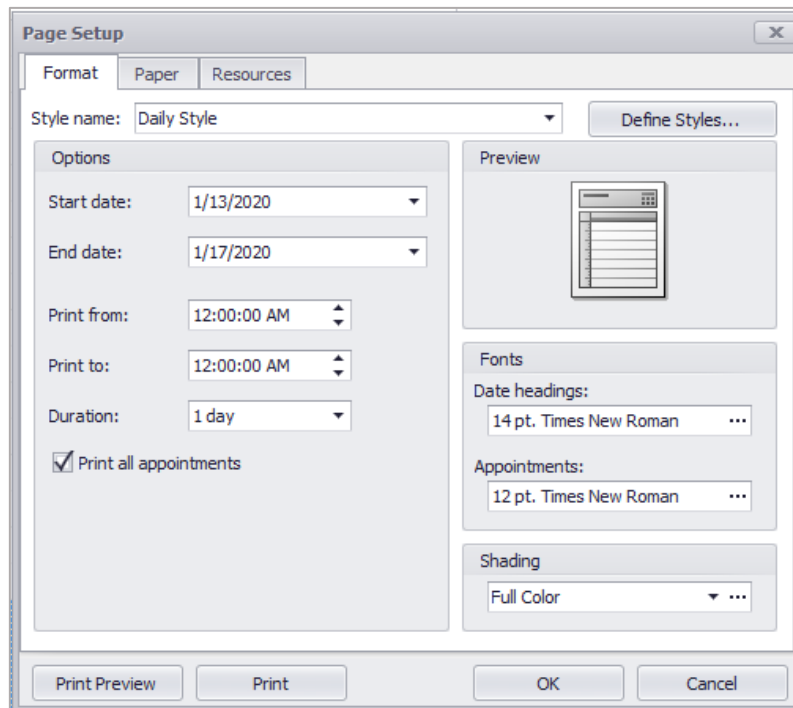


Image 2.5.5



Arrow keys to move between days



Jumps to the current date



Zooms in and out of an activity



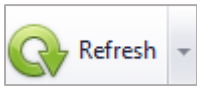
Displays calendar on a daily, weekly, monthly basis



Displays tasks on a timeline



Graphical representation of an activity over time



Reloads/Refreshes the calendar



Displays events without grouping



Grouping per day and per contact



Displays events separately for each company resource



Filters calendar activities. When performing a search (per resource, type of action, action status, quote status) the results will be limited to only those calendar entries matching the filters (**Image 2.5.6**).

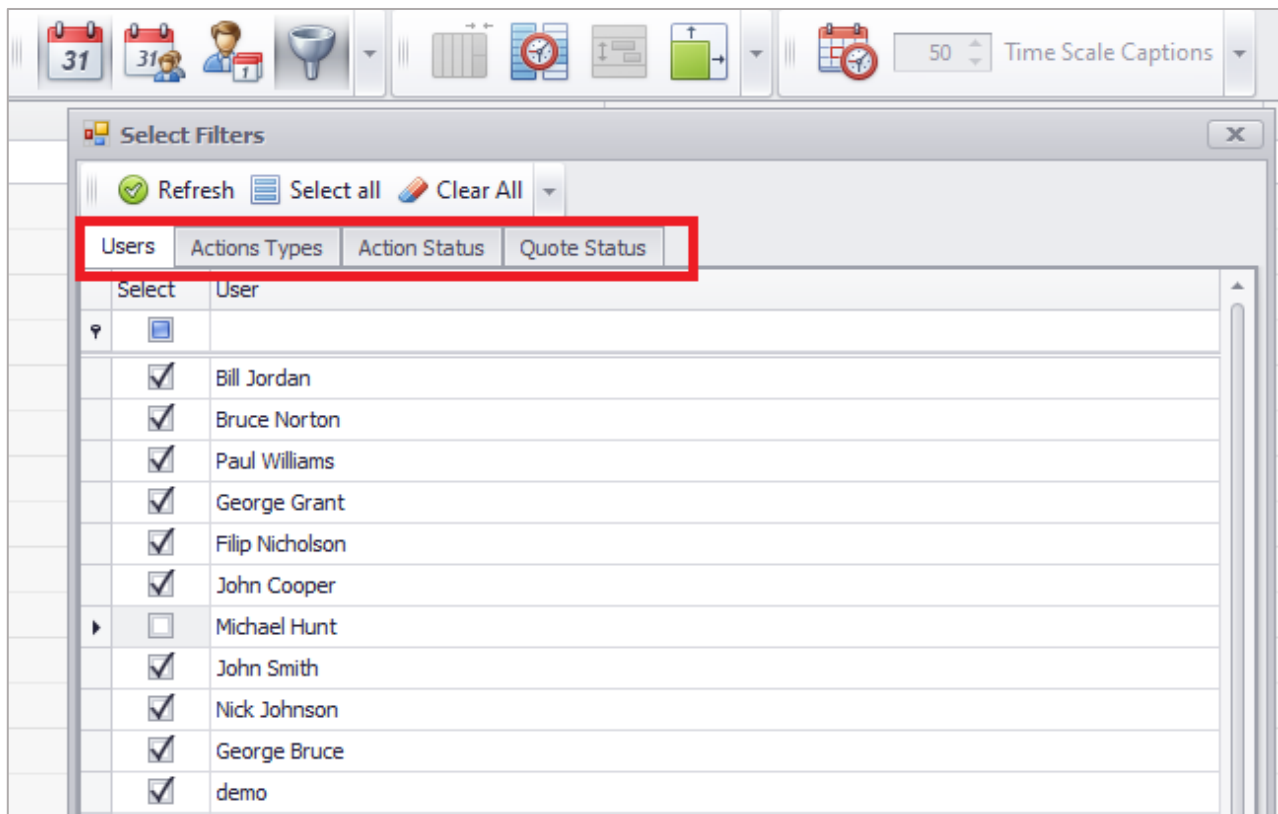
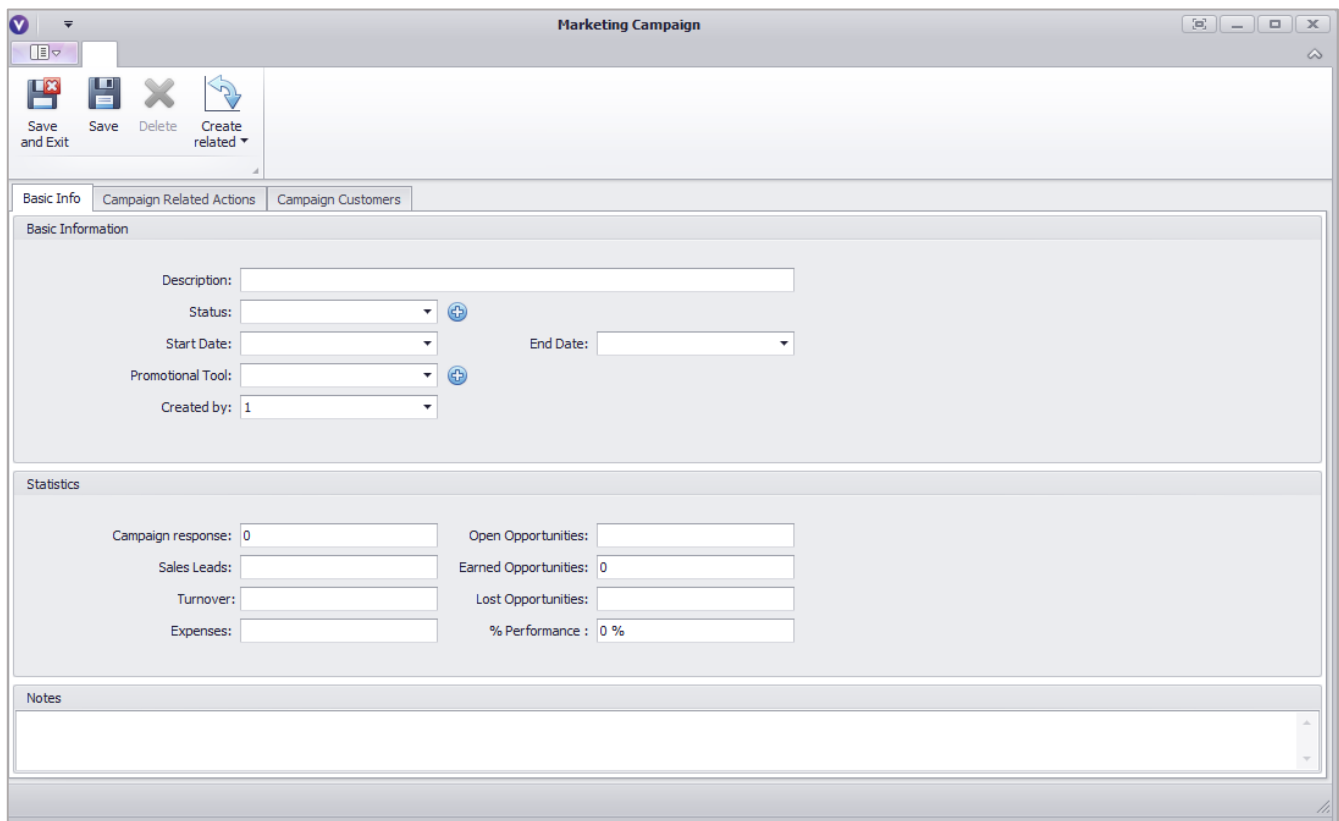


Image 2.5.6

MARKETING CAMPAIGNS

Users may create promotions or marketing campaigns for specific customer categories or for all customers. By selecting <Marketing Campaigns> from the menu, the user is taken to the following screen. (Image 2.6.1)



The screenshot shows the 'Marketing Campaign' form. It has a toolbar with 'Save and Exit', 'Save', 'Delete', and 'Create related' buttons. The 'Basic Info' tab is selected, showing the following fields:

- Description:
- Status: (with a plus icon)
- Start Date: (with a plus icon)
- End Date:
- Promotional Tool: (with a plus icon)
- Created by:

Below the Basic Info section is the 'Statistics' section with the following fields:

- Campaign response:
- Open Opportunities:
- Sales Leads:
- Earned Opportunities:
- Turnover:
- Lost Opportunities:
- Expenses:
- % Performance:

At the bottom is a 'Notes' section with a text area.

Image 2.6.1

BASIC INFORMATION

Description: Brief description of the campaign

Status: The status of the campaign

Start-End Date: The duration of the campaign

Promotional tool

A **sales opportunity** can be linked to a campaign

Once we fill in all the necessary information, we press <**Save**>.

STATISTICS: Help users measure the effectiveness of each marketing campaign that is launched.

Campaign response: The number of actions resulting from the campaign.

Sales leads: The number of potential customers targeted by the campaign.

Revenue: The revenue generated from the campaign.

Expenses: The expenses connected to the campaign. Campaign spending may cover human resource costs, advertising expenses, etc.

Open opportunities: The sales opportunities that are in progress or "Pending".

Earned opportunities: The sales opportunities having the status "Completed".

Lost opportunities: The sales opportunities having the status "Cancelled".

Rate of return (%): The efficiency and effectiveness rate is **automatically** filled in and is based on the sales leads and the earned opportunities (**Image 2.6.2**).

Statistics

Campaign response: 0	Open Opportunities:
Sales Leads:	Earned Opportunities: 0
Turnover:	Lost Opportunities:
Expenses:	% Performance : 20 %

Image 2.6.2

Once the Marketing Campaign is saved, the Trader tab is also updated, in the field **CRM -> Participation in Campaign** (**Image 2.6.3**).

CRM

Campaign Participation

Image 2.6.3

A Marketing Campaign may be linked with **1.** a CRM action, **2.** a meeting, **3.** a quote. The resources and actions required to manage the campaign are accordingly added to the related actions (**Image 2.6.4**).

Create related

- Related Action
- Meeting
- Quote

Image 2.6.4

A successful campaign may be converted into a **Template** for future use.

How do we create a marketing campaign template?

We select the desired criteria (e.g. Promotional tool, notes) in order to create the template content, we press the Save button  and we enter a title (brief description) of the template (**Image 2.6.5**).

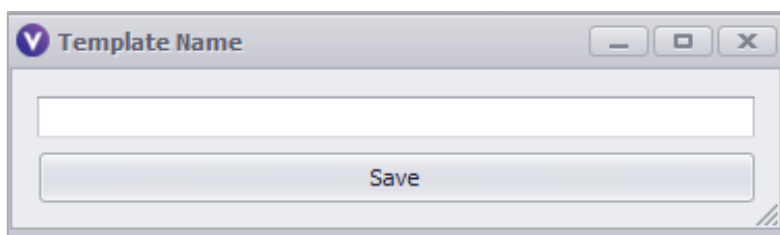


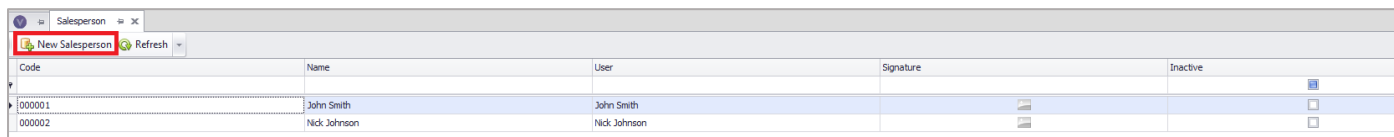
Image 2.6.5

Once we have created our template, we can select it from the list of marketing campaign templates.

RESOURCES

SALESPERSONS

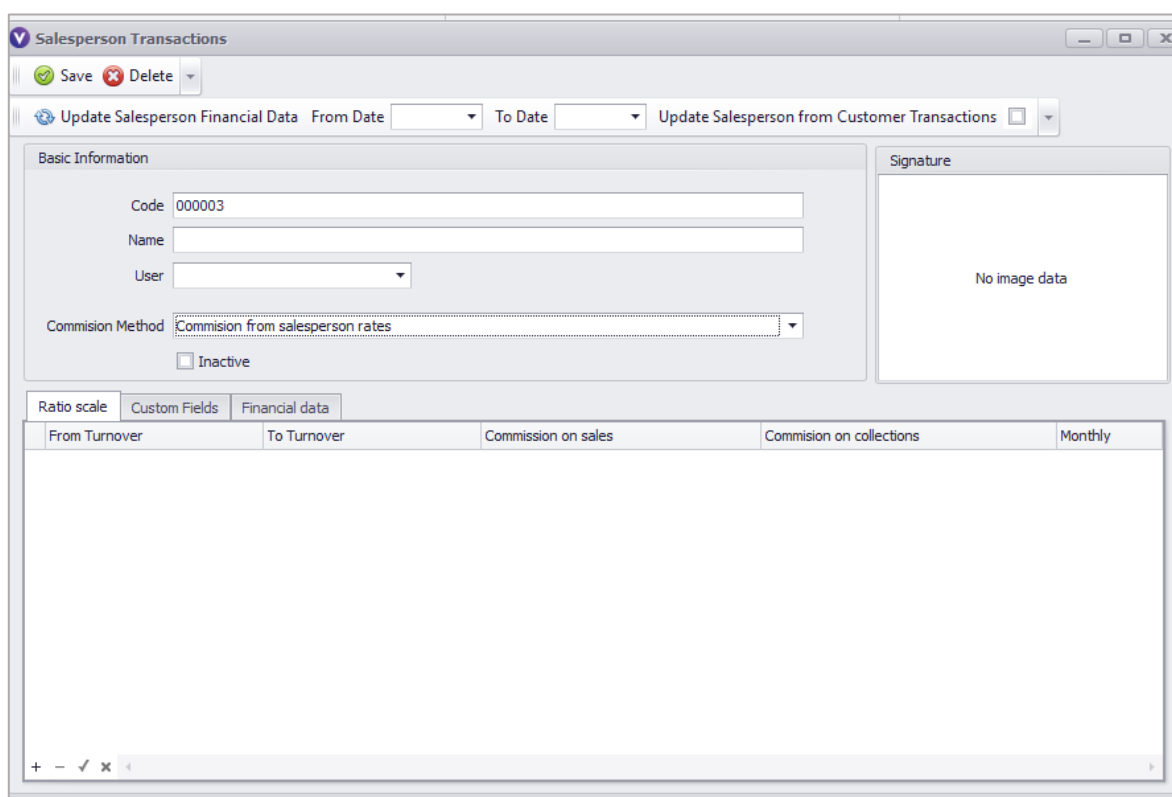
Here we can add the company's salespersons (**Image 3.1.1**) by clicking on the **New Salesperson** icon



Code	Name	User	Signature	Inactive
000001	John Smith	John Smith		☐
000002	Nick Johnson	Nick Johnson		☐

Image 3.1.1

and then completing the salesperson's tab (**Image 3.1.2**).



Salesperson Transactions

Save Delete

Update Salesperson Financial Data From Date To Date Update Salesperson from Customer Transactions

Basic Information

Code: 000003

Name:

User:

Commission Method: Commission from salesperson rates

☐ Inactive

Signature

No image data

Ratio scale Custom Fields Financial data

From Turnover	To Turnover	Commission on sales	Commission on collections	Monthly

Image 3.1.2

Code: The salesperson's serial number. Filled in automatically when the entry is created

Name: The salesperson's first and last name

User: Vortex user

Commission method: Filled in when the salespersons work on commission (CM Module) **Image 3.1.3.**

Basic Information		Signature	
Code	000003	No image data	
Name	JOHN SMITH		
User	John Smith		
Commission Method	Commission from product rates		
Ratio scale Custom From Turnover CommissionType Commission from salesperson rates Commission from product rates Commission from product and salesperson rates			
		Commission on collections	Monthly

Image 3.1.3

DEPARTMENTS

The company departments can be created here. A new department is added by clicking on the add icon  at the bottom of the screen (**Image 3.2.1**).

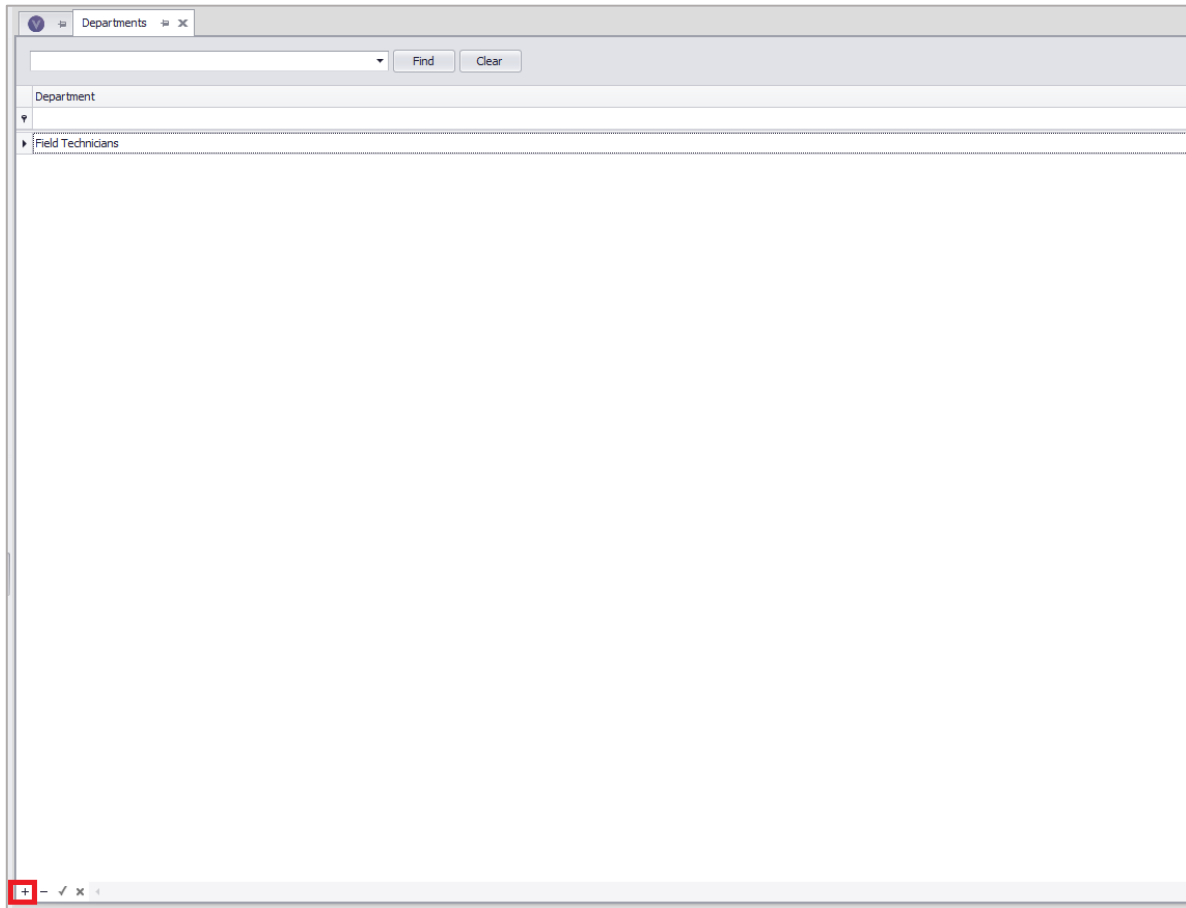
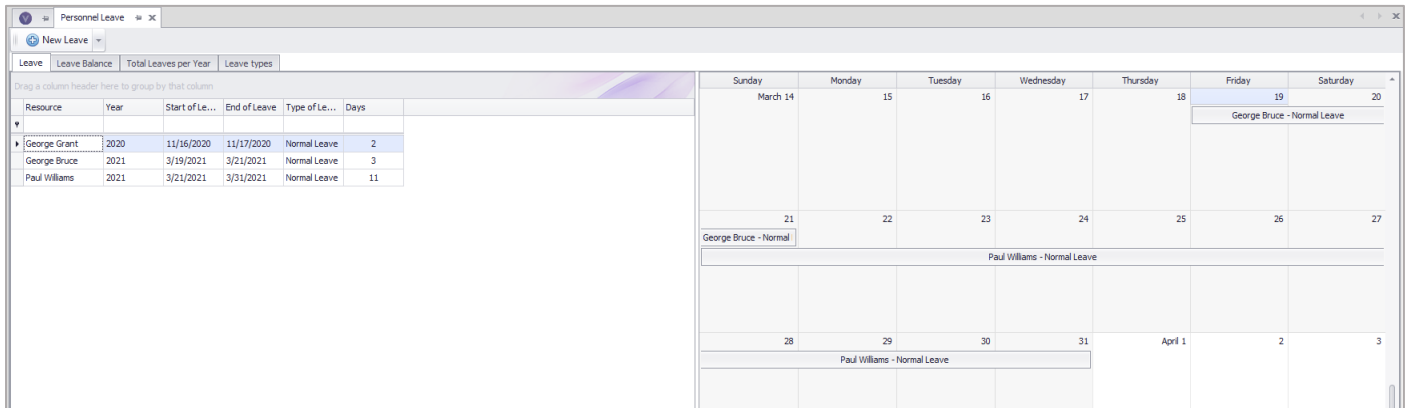


Image 3.2.1

PERSONNEL LEAVE

Allows users to manage personnel leaves. The time period, the number of days absent and the type of leave are defined for each leave (**Image 3.3.1**)



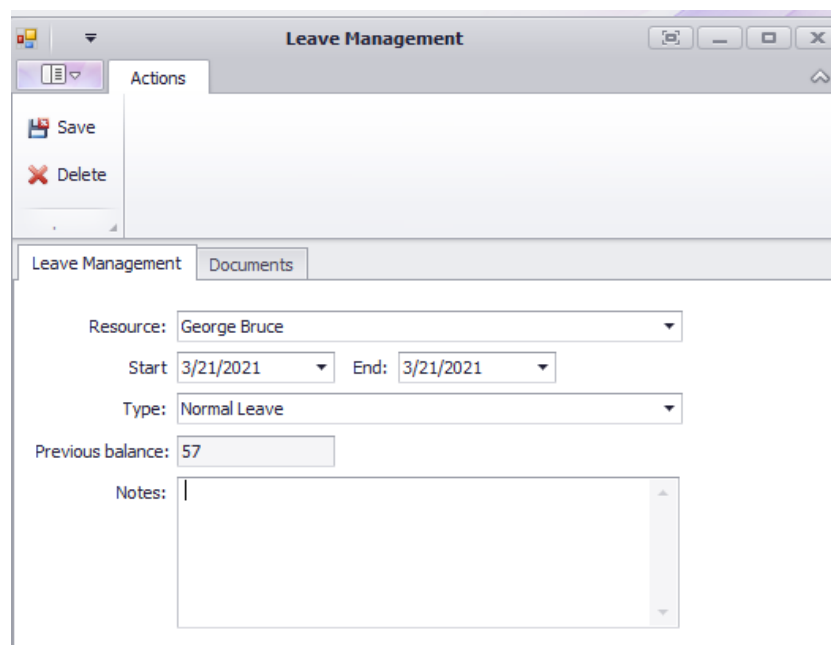
Resource	Year	Start of Le...	End of Leave	Type of Le...	Days
George Grant	2020	11/16/2020	11/17/2020	Normal Leave	2
George Bruce	2021	3/19/2021	3/21/2021	Normal Leave	3
Paul Williams	2021	3/21/2021	3/31/2021	Normal Leave	11

The calendar view on the right shows a grid from Sunday, March 14 to Saturday, April 3. It highlights leave periods for George Bruce (March 19-21) and Paul Williams (March 21-31).

Image 3.3.1

How do we add a new personnel leave?

Clicking on the < **New Entry** > button will open a form in which we can enter all the information of the new leave as well as the type of leave (after it has been created in the <Types of leave> tab) (**Image 3.3.2**).



Leave Management

Actions: Save, Delete

Leave Management | Documents

Resource: George Bruce

Start: 3/21/2021 End: 3/21/2021

Type: Normal Leave

Previous balance: 57

Notes:

Image 3.3.2

Leaves: Automatically displays the number of leave days the employee is entitled to (for the specific type of leave).

Remaining leave days: The remaining number of leave days (per type of leave for each employee).

Total annual leave days: The number of leave days that each employee is **entitled to** is filled in (per type of leave e.g. normal/sick/parental).

Types of leave: All types of leave are entered here.

WAREHOUSE

PRODUCTS

In the CRM Module, in addition to the ERP items, we can also create new products. These items/products can be used in actions, campaigns, sales opportunities, quotes and generally anywhere in the CRM.

In the Products tab, the administrator can add products by clicking on . The product information is filled in and the entry is saved by clicking on  (Image 4.1.1)

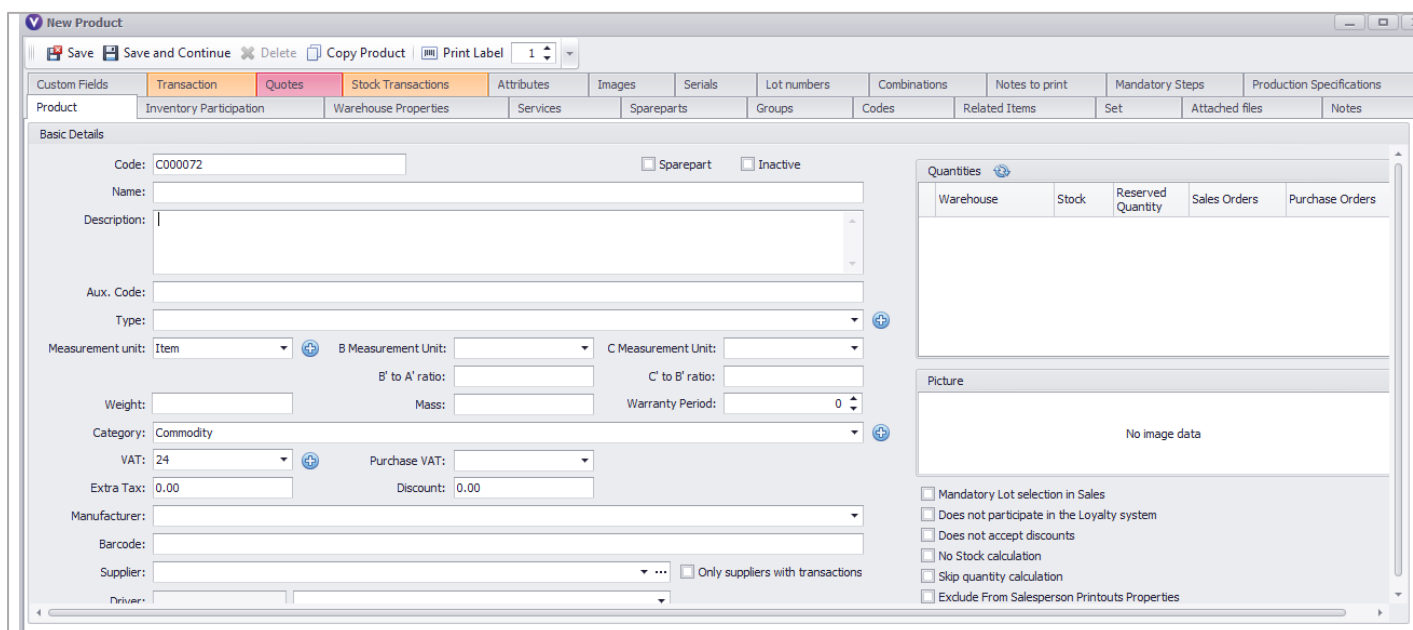


Image 4.1.1

PRODUCT TYPES

This tab contains a list of all product categories/types (Image 4.1.2). The administrator adds a product category using the add icon . The entry is saved by clicking on . A different colour coding is used per product type.

Products	Product Types
Types	
Find Clear	
Type	Color
▼	
▶ CARD PRINTER	251, 213, 181
CHECK SCANNER	215, 227, 188
INKJET	219, 229, 241
KEYBOARD	Khaki
LAPTOP	Salmon
LASER	253, 234, 218
MONITOR	204, 193, 217
PASSBOOK	215, 227, 188
PC	191, 205, 219
ROUTER	253, 234, 218
SCANNER	Pink
SERVER	Wheat
SWITCH	Gainsboro
TABLET	PeachPuff
ENERGY SYSTEMS	PaleTurquoise
CASH MACHINES	LightSteelBlue
TELECOMMUNICATION SYSTEMS	198, 217, 240
COOLING/HEATING SYSTEMS	229, 185, 183
SECURITY SYSTEMS	215, 227, 188
FIRE DETECTION	251, 213, 181
SECURITY SERVICES	219, 238, 227

Image 4.1.2

Double-clicking on the product will open the main Edit tab. Each product consists of multiple tabs with different functions (**Image 4.1.3**).

The screenshot shows the 'Edit' tab for a product named 'EVOLIS QB10 Mag'. The interface includes a top navigation bar with tabs for different product functions. Below this, the 'Basic Details' tab is active, showing fields for Code, Name, Description, Aux. Code, Type, and Measurement units. A 'Quantities' table is also visible, showing stock levels across different warehouses.

Warehouse	Stock	Reserved Quantity	Sales Orders	Purchase Orders
Warehouse A	0	0	0	0
Warehouse B	0	0	0	0
Warehouse C	0	0	0	0

Image 4.1.3

These tabs are:

Inventory participation: Requires the **CM** Module.

Warehouse properties: Requires the **CM** Module.

Services: Allows users to relate a product to specific services. Right clicking the **Select** checkbox on the left will select/deselect all services (**Image 4.1.4**). The same applies to the list of spare parts shown below. By choosing a product when creating a workorder **only** those services that have been selected will be displayed.

Custom Fields		Transaction	Quotes	Stock Transactions	Attributes	Images	Serials	Lot number	
Product		Inventory Participation		Warehouse Properties		Services		Spareparts	Groups
Related Services									
Select	Code							Service	
									
		C000021							PC Check
		C000020							Monthly Maintenance Check
		C000022							Monitor Check
		C000023							Keyboard & mouse Replacement
		C000024							Server Check
I		C000025							Storage check
		C000026							Switch Replacement
		C000027							Printer Check
		C000028							Guard rails repair
		C000029							Highway markers repair
		C000035							Pavement patching
		C000030							Road fences repair
		C000031							Crack filling

Image 4.1.4

Spare parts: Allows users to relate a product to specific services. By choosing a product when creating a workorder only those services that have been selected will be displayed.

Groups: Requires the **CM** Module.

Codes: Requires the **CM** Module.

Relevant Items: Requires the **CM** Module.

Attached Files: Allows users to attach files.

Notes: General product information.

Custom fields: Displays the custom fields of the products created in Settings -> Custom Fields.

Documents: Requires the **CM** Module.

Quotes: The quotes which refer to the particular product.

Balance Transactions: Requires the **CM** Module.

Attributes: The specific attributes of each product.

Images: Image upload.

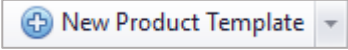
Serials: Requires the **CM** Module.

Lots: Requires the **CM** Module.

PRODUCT TEMPLATES

In Product Templates, we specify the attributes/specifications (i.e. serial number, model, manufacturer warranty) that will accompany a product wherever it is opened from. We can also define default values for the attributes.

How do we open a product template?

We select  to open the product template tab and edit it (**Image 4.2.1**):

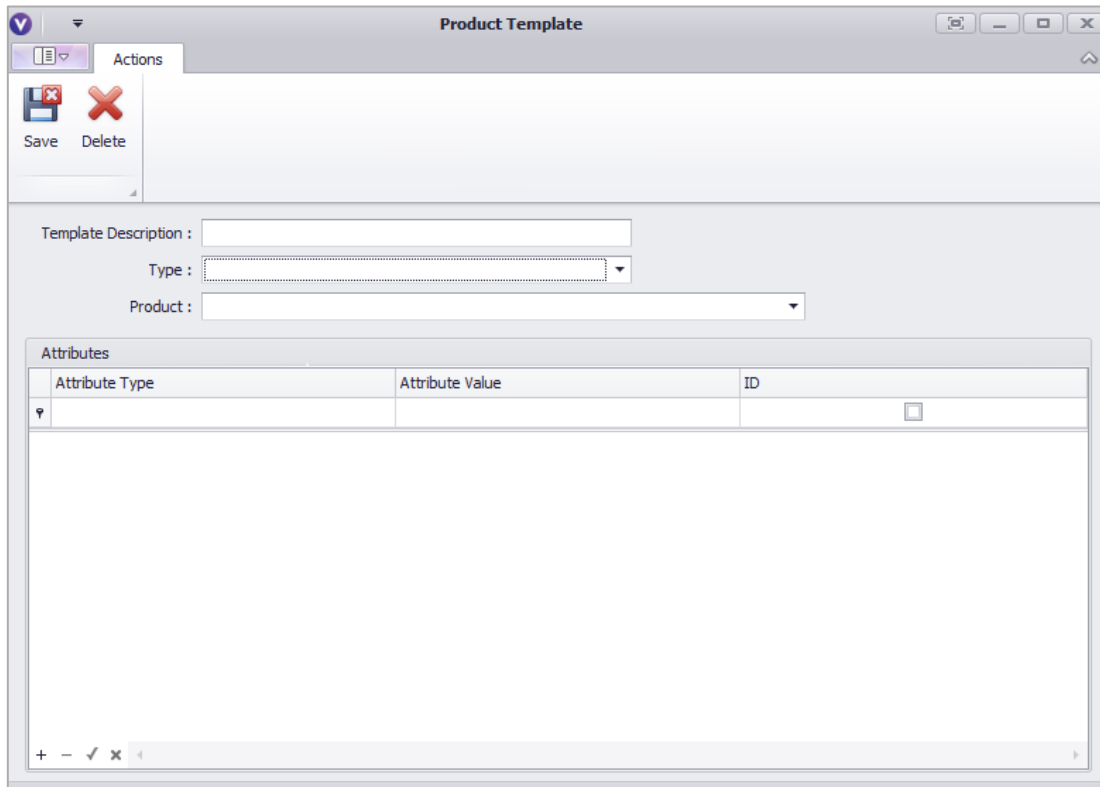


Image 4.2.1

Description of product template: We provide a general description for the product template

Type: We select the product template type/category

Product: We enter the product name

Below, we add all the attributes that will be associated with the product template. To illustrate this, and using the following image as an example, if we open the above product template in one site, a product with the attributes 'Serial No', 'Origin' and 'Attribute Value' will be automatically created. Then, if we want to create the following template in a site, the product will be automatically created with the specific attributes (**Image 4.2.2**).

Template Description :

Type :

Product :

Attributes

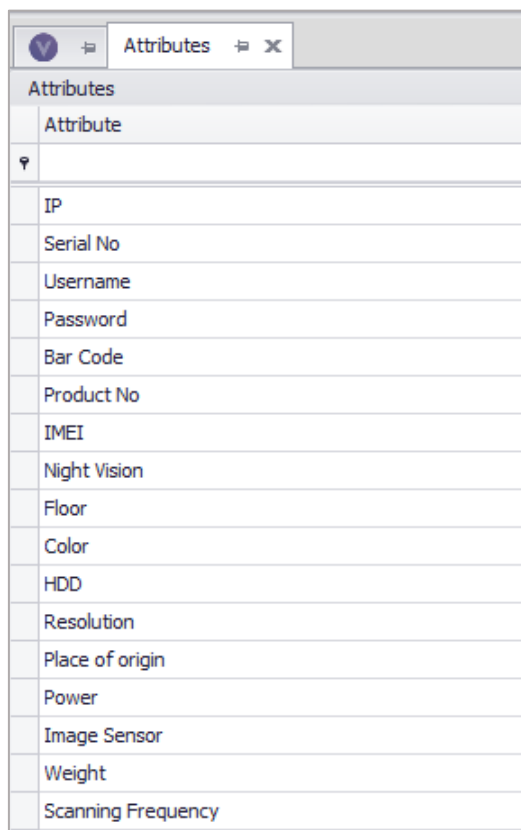
Attribute Type	Attribute Value	ID
?		☐
Product No	IPO5800	☒
Ram	4	☐
I Model	MyVisio Red30	☐

+ - ✓ ✕

Image 4.2.2

ATTRIBUTES

The **Add**  icon at the bottom left of the form allows us to add attributes to the products (**Image 4.3.1**).



Attributes	
	Attribute
	
	IP
	Serial No
	Username
	Password
	Bar Code
	Product No
	IMEI
	Night Vision
	Floor
	Color
	HDD
	Resolution
	Place of origin
	Power
	Image Sensor
	Weight
	Scanning Frequency

Image 4.3.1

ADDITIONAL TABS (**Image 4.3.2**)

Sensitive data	Mandatory for Invoicing	Show to Reports	Participates in product combinations	Publish to the Web Service
☐	☒	☒	☒	☒

Image 4.3.2

Sensitive data: Depending on the user's permissions (rights granted in Settings -> Roles), we authorize or restrict the access to data (attribute values) that has been qualified as sensitive data. If we click the corresponding check box the user will have access to the attributes' sensitive data.

Mandatory for invoicing: *Requires the **CM Module**.*

Print to invoices: *Requires the **CM Module**.*

Participates in product combinations: *Requires the **CM Module**.*

SUPPLIERS

With the **Add**  icon at the bottom left of the form we can add the product suppliers. **(Image 4.4.1)**



The screenshot shows a web browser window with a single tab titled 'Manufacturers'. Below the browser window is a table with the following structure:

Manufacturer	Website	Email	Phone	Contact	Trader

Image 4.4.1

SETTINGS

USERS

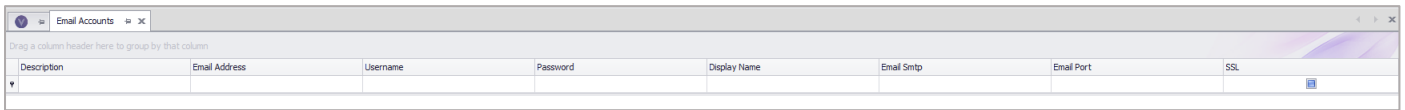
User rights are defined **ONLY** by the system administrator, for whom all the rights in all application forms have been enabled. Users have a username and password, and are assigned a single role. Depending on their role, they are allowed to perform specific actions. A new user is added by clicking on the Add button at the bottom of the screen (**Image 5.1.1**).

Locked Acc...	UserId	Full name	UserName	Password	E-mail	Email Account	Partner	IsActive	RoleId	External User	Customer	Site	Login failed...	Change Pa...	Working days	Save filters...	C
	20	Bill Jordan	ngkivanozis	*	vniki@vortexinfocom.gr		DC	☐	User	☐			0	☐		☐	
	21	Bruce Norton	nsoulakellis	*	ksalathelis@vortexinfocom.gr		DC	☐	User	☐			0	☐		☐	
	22	Paul Williams	gtourlakis	*	keftimiopoulos@vortexinfocom.gr		DC	☒	User	☐			0	☐		☐	
	23	George Grant	tmanousakis	*	skapelouzos@vortexinfocom.gr		DC	☒	User	☐			0	☐		☐	
	24	Filip Nicholson	klyras	*	fgazas@vortexinfocom.gr		DC	☒	User	☐			0	☐		☐	
	25	John Cooper	Kexarhos	*	jaggelakis@vortexinfocom.gr		DC	☒	User	☐			0	☐		☐	
	27	Michael Hunt	Fsalamaras	*	spavlou@vortexinfocom.gr		DC	☒	User	☐			0	☐		☐	
	36	John Smith	VTegos	*	tantanopoulos@vortexinfocom.gr		DC	☒	User	☐			0	☐		☐	
	38	Nick Johnson	Nrigatos	*	njohnson@vortexinfo.com		DC	☒	User	☐			0	☐		☐	
	55	George Bruce	PTriantis	*	gbruce@vortexinfo.vom		ITMANIAC	☒	User	☐			0	☐		☐	
	58	demo	demo	****	demo		DC	☒	User	☐			0	☐		☐	
	59	1	1	*	gkouris@ddis.gr		DC	☒	Administrator	☐			0	☐		☐	
	60	OTE	ote	***	ote@ddis.gr		ITMANIAC	☒	Administrator	☐			0	☐		☐	
	61	Customer	cus	*	cus@ddis.gr			☒	User	☐	PALM JUMEIRAH	PALMA RES...	0	☐		☐	
	62	Mike Smith	MSmith	****	Mike@dc.gr		DC	☒	User	☐			0	☐		☐	
	63	rtretr	sefs	***	dfs@fsdfs		DC	☒	User	☐			0	☐		☐	

Image 5.1.1

EMAIL ACCOUNTS

Vortex allows users to add email accounts. (Image 5.2.1)



Description	Email Address	Username	Password	Display Name	Email Smtip	Email Port	SSL

Image 5.2.1

Add an email account

To add an account, all the necessary information is filled in by pressing .

DESCRIPTION: A brief description of the email account

EMAIL ADDRESS: The email address (email@email.com)

USERNAME: The username required to login to the email account

PASSWORD: The password required to login to the email account

DISPLAY NAME: The name that shows up when users send an email

EMAILSMTP: The outgoing email server address

EMAILPORT: The communication channel through which emails are sent

SSL: The encryption protocol for secure communication

In the end, the entry is saved by pressing .

ROLES

Users can create and manage different work roles, so that each role is granted separate rights to perform tasks in the Vortex CRM Module. Each user can have one or more roles, by inheriting the respective rights.

A new role is added by clicking on  at the bottom of the screen. (Image 5.3.1)

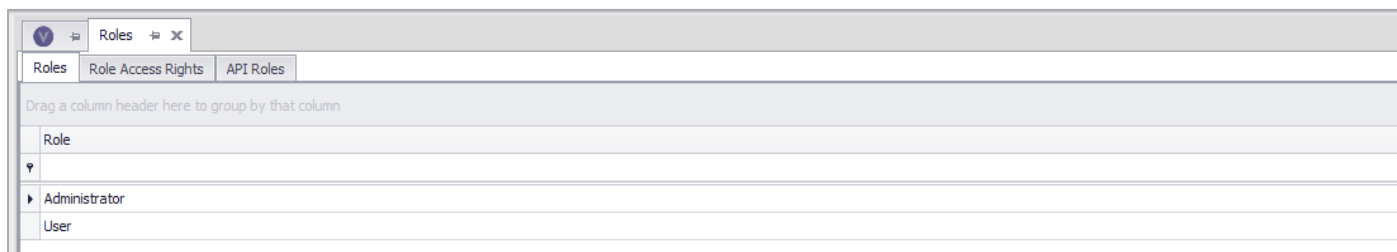


Image 5.3.1

Then, users need to define the **rights** of each role. The right to view, modify or delete entries is granted to users for specific categories or other content.

Entities: The right to view, add or delete entries is granted to users for specific categories or other activities (Image 5.3.2)

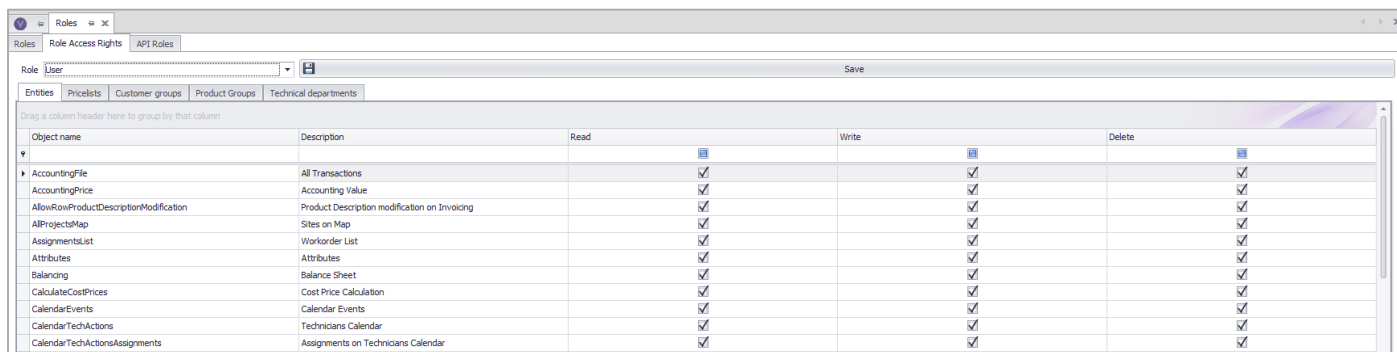


Image 5.3.2

Pricelists: Requires the **CM** Module.

Customer groups: Here users are granted the right to view, add or delete entries (optional, in case customers have been grouped).

Product groups: Here users are granted the right to view, add or delete entries (optional, in case products have been grouped).

Technicians departments: Requires the **FSM** Module.

PARAMETERS

APPLICATION PARAMETERS (Image 5.4.1)

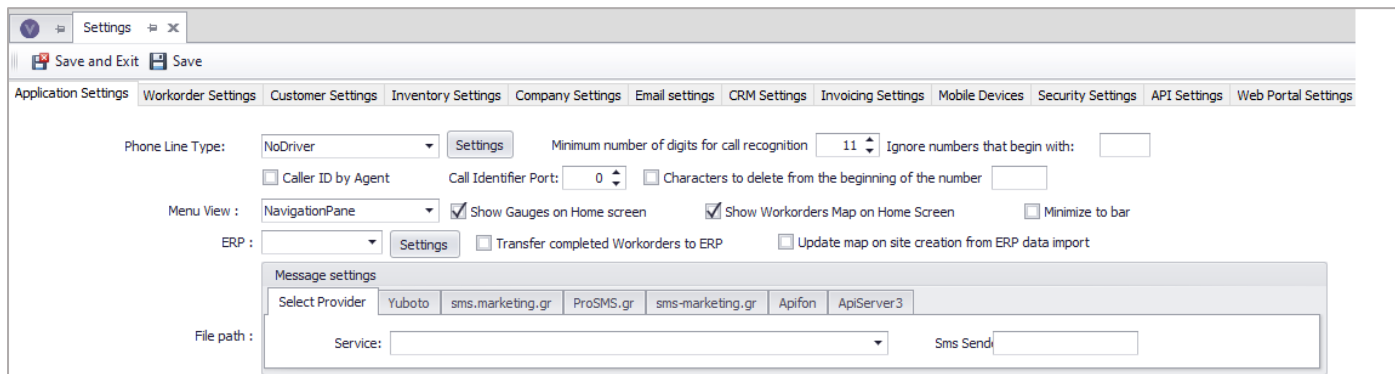


Image 5.4.1

Type of phone line: Vortex connects to an Asterisk call centre system

Minimum number of caller ID digits

Ignore numbers starting with

Caller ID by Agent

Caller ID portal

SMS settings: Sending an SMS requires having an SMS provider. The SMS service providers that support Vortex are: Yoboto, sms.marketing.gr, ProSMS.gr, sms-marketing.gr.

Google Api Key: The new Google interface (API) key is filled in.

Customer prefix: Codification applied to traders.

'One site' option activated in the 'Create a new customer' tab. By clicking on the check box, a site will be automatically created in the customer tab when creating a new customer and will contain its company name in the site description.

CRM SETTINGS -> GENERAL CRM SETTINGS (Image 5.4.2)

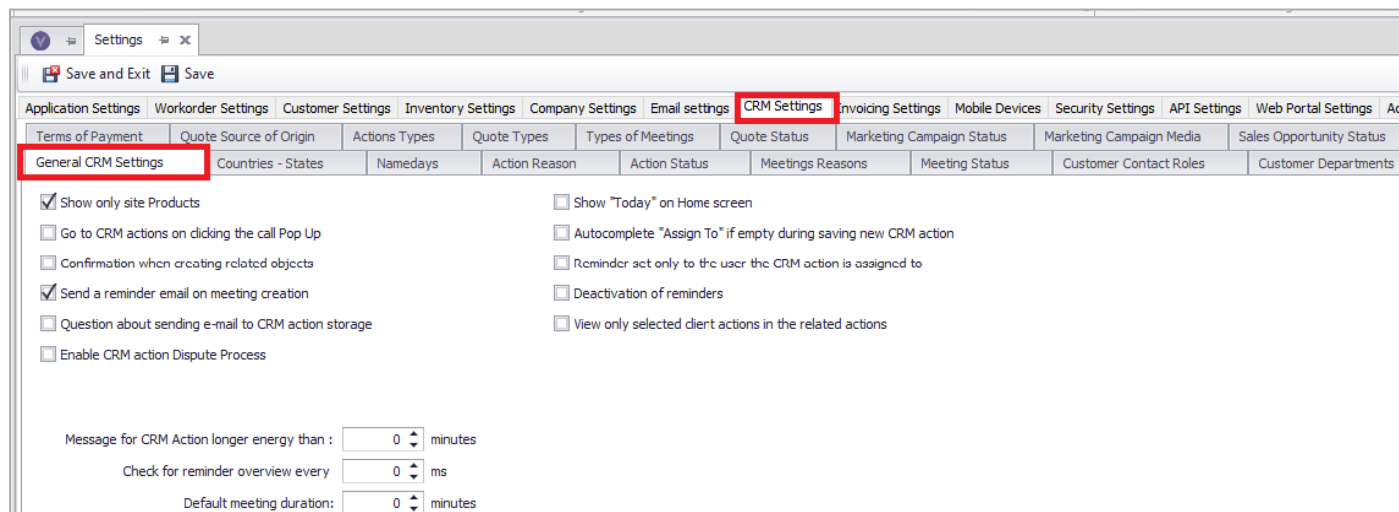


Image 5.4.2

Show only site products: In the CRM functionalities where products are displayed (such as CRM Actions or Meetings, etc.), when activated this option displays only the products of the specific site and not all customer sites.

Go to actions after clicking on the call pop-up window:

Confirmation when creating related actions: A confirmation message is displayed when relating actions.

Send a reminder to the provided email address when creating a meeting: Allows users to send customers a reminder email when creating a meeting

Question about sending an email when saving a CRM action: An email with the action's information and notes is sent when saving an action.

Display the "Today" view on the home screen

Automatically fill in the "Assigned to" field if left blank when saving a new action:

Send reminder only to the user to whom the action has been assigned: By selecting this check box, users can set reminders for CRM actions.

Turn off reminders: Turns off all reminders

Check for reminders every X minutes: Reminders for events and meetings (time defined in minutes)

Default action

Default action in incoming calls

Select user for incoming call pop-ups: The user to whom a pop-up window will be displayed during an incoming call is selected

Completed actions status

Materialized quote status

Default fields: The default fields that each user will have in **1. Actions, 2. Meetings, 3. Quotes.**

Rules for mandatory fields (Image 5.4.3): The fields required to save a CRM action.

Rules for mandatory fields:	Object	Type	About	Product	Site	Contact	Service	Project	Related Quote	Marketing Campaign	Applies to

Image 5.4.3