

# Main Features of Evolution CRM Functions

**Please Note : this is not a user manual. Full training on the CRM system is available on request.**

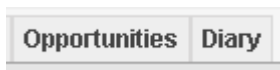
The Evolution CRM add on includes the following :

- Diary
- Opportunities
- Pipeline Reports

These can be accessed using the main menu buttons on the left hand side of the Evolution menu :

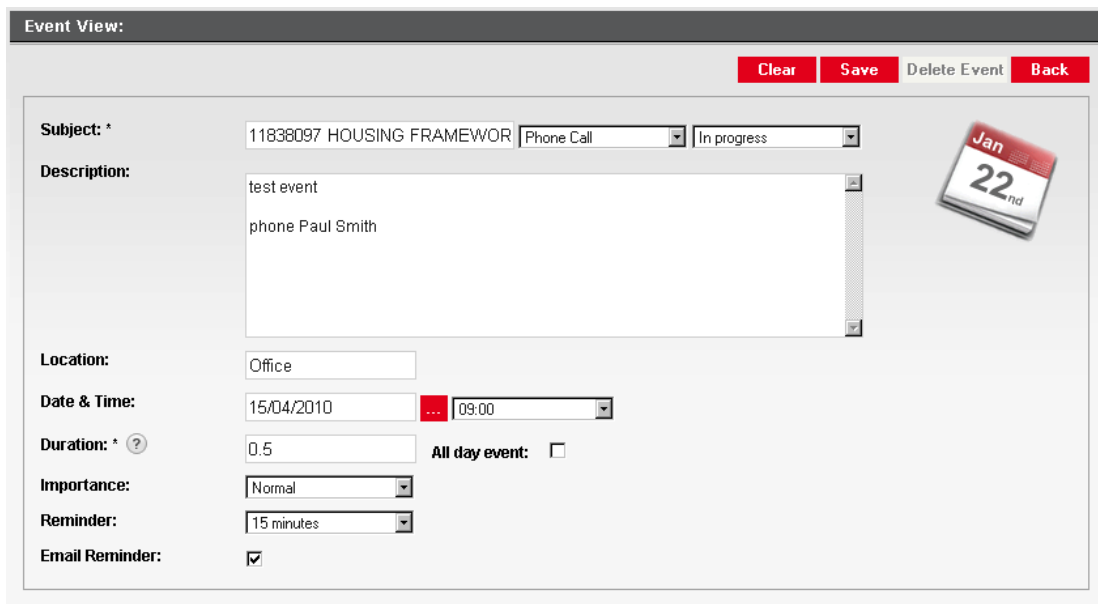


Opportunities and diary can also be accessed from within a project or company, allowing you to link diary events or opportunities to projects or companies :



## Diary

Creating Diary Events can be done from the diary and also from within a project or company. Creating an event from within a company or project will link the event to the project / company and bring the project / company details into the event subject line :



The screenshot shows the 'Event View' form with the following fields and values:

- Subject:** 11838097 HOUSING FRAMEWOR (Phone Call) (In progress)
- Description:** test event  
phone Paul Smith
- Location:** Office
- Date & Time:** 15/04/2010 (09:00)
- Duration:** 0.5 (All day event: )
- Importance:** Normal
- Reminder:** 15 minutes
- Email Reminder:**

As you will see from the above screenshot, you are able to specify the subject of the event, the type of event, the progress, location, date/time, duration, importance and also the option to have a reminder prior to the event or an email reminder sent to your registered email address.

Reminders will appear in the Diary Alert box below the main menu on the left hand side of Evolution :

**Diary Alert**

6 Reminders

0 Events

6 Overdue

Once the Event is created and saved you also have the option to download the event into your own Microsoft Outlook Calendar :

**Event Confirmation**

**Event Saved** ✓

You are now able to:

Download Event
Edit Event
Delete Event
Return to Diary

This will produce a diary event in your Outlook Calendar as follows :

Subject:	11838097 HOUSING FRAMEWORK - MAJOR WORKS		
Location:	Office		
Start time:	Thu 15/04/10	09:00	<input type="checkbox"/> All day event
End time:	Thu 15/04/10	10:00	
<input checked="" type="checkbox"/> Reminder:	15 minutes		Show time as: <span style="background-color: blue; color: white; padding: 2px;">Busy</span>
test event			
phone Paul Smith			
-----			
Project Id : 11838097			
Project Title :HOUSING FRAMEWORK - MAJOR WORKS			
Scheme : Social housing major works framework.			
-----			

Events Entered into the diary can also be viewed within the Diary area of Evolution :

Thursday - 15 April																				
<table style="width: 100%; border-collapse: collapse;"> <tr><td style="padding: 2px;"><input type="checkbox"/> 08:00</td></tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 10:00</td></tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 12:00</td></tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 14:00</td></tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 16:00</td></tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 18:00</td></tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 20:00</td></tr> </table>	<input type="checkbox"/> 08:00	<input type="checkbox"/> 10:00	<input type="checkbox"/> 12:00	<input type="checkbox"/> 14:00	<input type="checkbox"/> 16:00	<input type="checkbox"/> 18:00	<input type="checkbox"/> 20:00	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;"><input type="checkbox"/> 09:00</td> <td style="padding: 2px;">11838097 HOUSING FRAMEWORK - MAJOR WORKS, Office, (5 hrs)</td> </tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 11:00</td><td></td></tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 13:00</td><td></td></tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 15:00</td><td></td></tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 17:00</td><td></td></tr> <tr><td style="padding: 2px;"><input type="checkbox"/> 19:00</td><td></td></tr> </table>	<input type="checkbox"/> 09:00	11838097 HOUSING FRAMEWORK - MAJOR WORKS, Office, (5 hrs)	<input type="checkbox"/> 11:00		<input type="checkbox"/> 13:00		<input type="checkbox"/> 15:00		<input type="checkbox"/> 17:00		<input type="checkbox"/> 19:00	
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Clicking the event will allow you to view the event and also access any projects / companies linked to the event.

## Opportunities

Similar to the Diary, opportunities can also be created from within a project / company, linking it to that project or company.

Creating an opportunity is done using the simple window below :

**Opportunity**

Title: Opportunity with HOUSING FRAME +

Forecast Value: 9000 +

Target Date: 15/04/2010 ... \*

Stage: Identified

Likelihood %: 5  Update from stage +

Reference ? : test

Quote ? : 8999

Product ? : Windows

Owner: James Garratt

Notes: TEST NOTES

Buttons: Add Note, Link to Event, Add Event, Delete, Update Opportunity

**Related Projects**

Project	Value	Location	Updated
HOUSING FRAMEWORK - MAJOR WORKS	£50M	Cheshire, CH1	13-Apr-10

You can see that this opportunity has been linked to a project. You have the ability to input a forecast value, target date, reference, quote, product and also notes for the opportunity. You can also link this opportunity to different stages which will increase the % likelihood as you move up the stages :

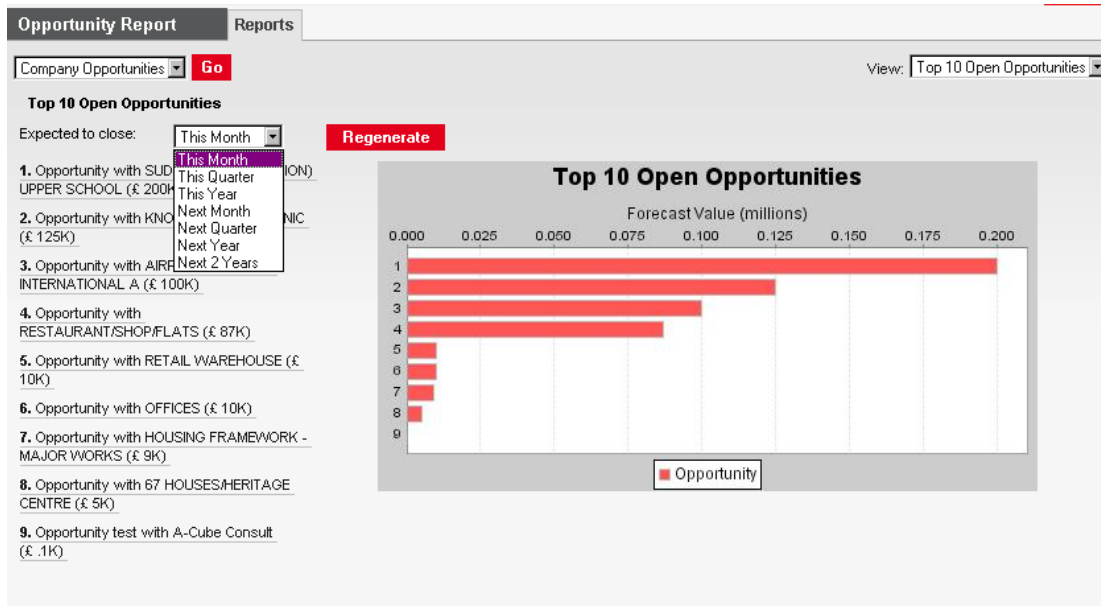
- Identified
- Need Find
- Meeting
- Quoting
- Negotiation
- Closed - Won
- Closed - Lost
- Closed - Cancelled
- On Hold

These stages can easily be renamed or deleted using the opportunities configuration tab within configuration. You can also add your own stages :

Stage / Status	Outcome	Linked %	Order	Available
Identified	Open	5	1	Yes
Need Find	Open	10	2	Yes
Meeting	Open	25	3	Yes
Quoting	Open	50	4	Yes
Negotiation	Open	75	5	Yes
Closed - Won	Won	100	6	Yes
Closed - Lost	Lost	0	7	Yes
Closed - Cancelled	Cancelled	0	8	Yes
On Hold	Open	5	9	Yes

Opportunities tie in with the **Pipeline Reports**

Pipeline reports allow you to display **your opportunities** or **your companies opportunities** on a simple graph :



This Graph can be generated using different measures as shown in the drop down menu allowing you to display opportunities expected to close this month up to the next 2 years.

Reports can also be produced on the opportunities using the drop down menu at the top right of the Pipeline reports screen



These reports will be produced as below and can also be downloaded into an Excel Spreadsheet (CSV)

Estimated close:	0-20%	21-40%	41-60%	61-80%	81-90%	91-100%	Total
This Month	1, £ 9K		2, £ 10.1K	2, £ 210K	2, £ 130K	6, £ 312K	13, £ 671.1K
Closing May 2010		2, £ 50K	1, £ 10K	2, £ 15K			5, £ 75K
Closing Jun 2010			1, £ 5K	1, £ 20K		1, £ 20K	3, £ 45K
Closing Jul 2010			1, £ 30K				1, £ 30K
Closing Aug 2010						1, £ 50K	1, £ 50K
Closing Sep 2010						1, £ 50K	1, £ 50K
Closing Oct 2010							
Closing Nov 2010							
Closing Dec 2010							
Closing Jan 2011							
Closing Feb 2011							
Closing Mar 2011							
Closing Jun 2011						1, £ 30K	1, £ 30K

[Download CSV](#)

For examples of more reports available or for a demonstration of our CRM add on please contact your account manager.