ChannelOnline™
Account Management User Guide

Version 1.0

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For questions and comments
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Overview

ChannelOnline provides a straightforward way to manage account records. Essential record types are supported with the ability to convert certain types from one to another, as defined in the workflow.

Account Record Types

- Customer (Default) – The default type that resembles an actively buying account.
- Lead – Easy to create with only a First and Last Name plus an email address. They are mainly used for inbound marketing efforts or as a placeholder on initial contact. Special tracking information can be logged and displayed on the dashboard. Leads can be converted into any other type.
- Prospect – These accounts are actively being worked on and are in between the Lead and the Customer types. Closely related to customers in that they are assigned to a catalog and price profile for quote and proposal generation.
- Partner – Accounts that do business with your company and jointly work on solutions or assist in conducting business (for example: another service provider that focuses on security).
- Vendor – Unlike suppliers, these could be vendors that you work with that provide goods and services to your company (like accounting, catering, etc.).
- Generic – Anything that isn't covered above.

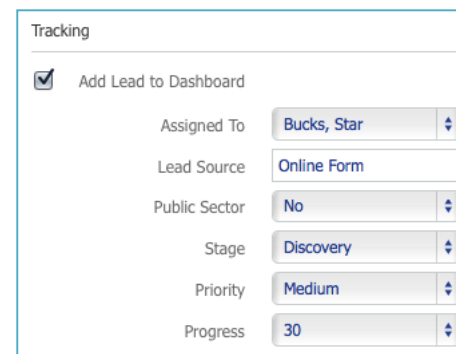*Primary Account Tracking & Custom Fields:*

Leads and Prospects have special fields associated with them for tracking their progress from Lead to Prospect to Account.

Add Lead to Dashboard – Checkbox in Edit that places the lead on the assigned SalesRep's dashboard widget.

Assign To – Assign the lead to a user to be worked on by selecting the user from the available dropdown list. It is equivalent to assigning customers to a SalesRep.

Lead Source – To capture the source or method in which the lead reached your company (example: Referral).

Public Sector – Allows you to capture if this is a private or public company/organization. Options include: Federal, State & Local, Higher Ed, K-12 (this is optional and reportable).

Stage - New, Qualified, Discovery, Quoted, Commitment, Not Ready to Buy, Closed

Priority – Urgent/High/Medium/Low (shown on Lead dashboard widget)

Progress - 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90% 100% (shared with Lead Task Header) (like a quote converting to SO, this disappears when the record is converted to a Customer / Partner / Vendor / etc)
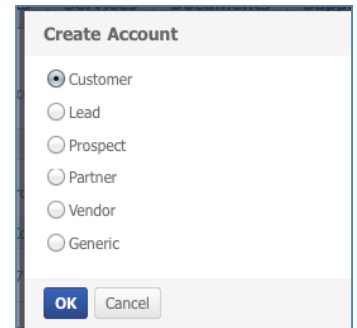
Default Custom Fields available on Lead, Prospect, and Account types (these are reportable fields):

- Industry - what primary industry this account is doing business in
- Brands - Primary brands this account uses / purchases
- Suppliers / Vendors - Other businesses the account purchases from

Creating an Account

There are two ways to create accounts in ChannelOnline – either from the plus icon next to the Recent / Accounts title in the left menu in the control panel, or the Create Account link on the Accounts tab page. Once the Create window is launched, you can select the type of account you wish to create by selecting the proper radio button and clicking OK.

After selecting OK, the main edit page for the type you selected will be displayed. Fill in the accounts details (there are a minimal number of required fields), and select either Save or Next until all the known information is completed.

Converting Account Types

Although accounts are created as a specific type, there is the ability to convert some account types from one to another. Below are the standard account type conversion workflows. To convert an account, select the "Convert to XXX" link in the Account Actions component on the account view page. All account conversions are manual to allow complete control over the process.

Lead > Prospect > Customer > Customer (Former)
Lead > Customer > Customer (Former)
Lead > Vendor / Partner / Generic
Prospect > Customer > Customer (Former)
Customer > Customer (Former)

Vendor / Partner / Generic

On the account edit page you can change the state of any account to "Former". This assists when searching through account records in the Accounts tab or reports to separate active from former accounts. To remove accounts from search results, you must use the "Delete" action from search results (they will still be available in the Recycle Bin for retrieval).

Leads and Prospects

As outlined above, Leads and Prospects are two account stages that define an account while they are being worked with and before they make a product purchase (therefore becoming a customer). Leads can move to any other account type, but Prospects can only become customers. Functionally, the Lead is a basic entry requiring very little data. On the other hand Prospects are more like customers and will be assigned a default Price Profile, Catalog, and Storesite to facilitate the creation of quotes and proposals. Each type can be added to the Lead & Prospect Tracking widget on a user's dashboard by selecting the checkbox labeled "Add Lead to Dashboard".

Lead Tracking				
Priority	Stage	Progress	Company	Contact
☐ Urgent	Qualified	30%	IT Support R Us	James, Mayana
☐ Medium	New	10%	Sometime After	Everythingafter, August
☐ Low	Discovery	10%		Washoe, Tahoe
				View All Leads

Granting Account Permissions

By default, all "Create / Edit Accounts" and "View all Accounts" permissions are enabled for members of all default read-only Access Rights Profiles that are tied to a user license (the Employee Profile is excluded). Customized Access Right Profiles, those not part of the system defaults, will need to be updated. Access Rights Profiles can be found at: *Admin -> Personnel -> Access Rights.*

The permissions allow you to separate team members that have to work on certain account types from those that can only view them.

- **Create / Edit Customers** – Allows users to create all types of accounts, but only edit those they have access to (assigned or through Group access rights).
- **View all Customers** – Allows users to view all accounts they have access to, but not edit them.

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- **Edit all Customers** – Allows users to edit all accounts they have access to, even if they did not create the account.

Account View Layout & Components

The account view is divided into multiple components. Each component targets specific information that can be grouped together. Components that are displayed are dependent on the account type that is being viewed. For example, a Lead will have fewer components showing than a Customer because a Customer has more data to display.

Account View Component Layout

The default layout of the components has been set for standard use. Each user can alter the arrangement of components to suit their own preferences for seeing account data. To rearrange the components, a user can click on the gear icon on the top right of the page. Once the icon has been selected, the screen will present the Layout Mode where users can drag and drop the components into desired locations. After all the components are in place, select the "Save" button to close and return to the Account View. This customized view will be used for all account and account types.
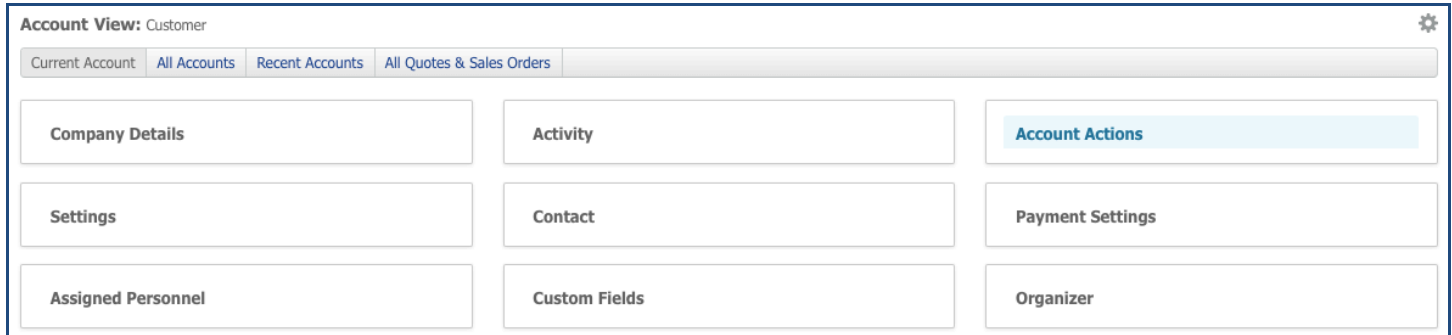
View Components (shown on Lead)

Layout Mode (Shown on Customer)

List of Account View components:

- Account Actions – contains actionable links for converting, deleting, exporting, or custom links.
- Activity – displays a quick view of recent documents and StoreSite page views.
- Company Details – essential address and company contact information.
- Contact – defaults to the last contact used for that company; click contact name to access the contact dropdown to switch contacts.
- Custom Fields – displays any global or customer custom field content.
- Organizer – summary of how many notes and tasks have been created, plus links directly to the Organizer to add, read, and edit them.
- Payment Settings – reflection of settings established for account.
- Settings – general internal information and key account settings.
- Tracking – Lead and Prospect component for seeing where the account is in the funnel.
- Assigned Personnel – list of internal personnel assigned to the account record (Account Manager, Customer Service Rep, Service Technician & Credit Manager).

Account Activity Log

Used for tracking updates and modifications to the account record. Update activity that will be recorded:

- Creation date and by whom.
- Modifications to general settings (phone numbers, addresses, payment settings, etc.) log a change but not the detail.
- Contacts are added / edited, when, and by whom.
- Account record type changes (example from Lead to Customer).
- When Notes or Tasks are created and by whom.

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