

<u>INTRODUCTION</u>	<u>2</u>
<u>ENABLE CRM</u>	<u>2</u>
<u>CRM SETTINGS</u>	<u>3</u>
<u>CUSTOMER INITIATED CRM</u>	<u>5</u>
<u>PROCESS CRM</u>	<u>7</u>
<u>CLOSE CRM</u>	<u>9</u>
<u>MERCHANT INITIATED CRM</u>	<u>11</u>
END – YOU’VE REACHED THE END OF THIS GUIDE.	13
CONTACTING 3DCART	13

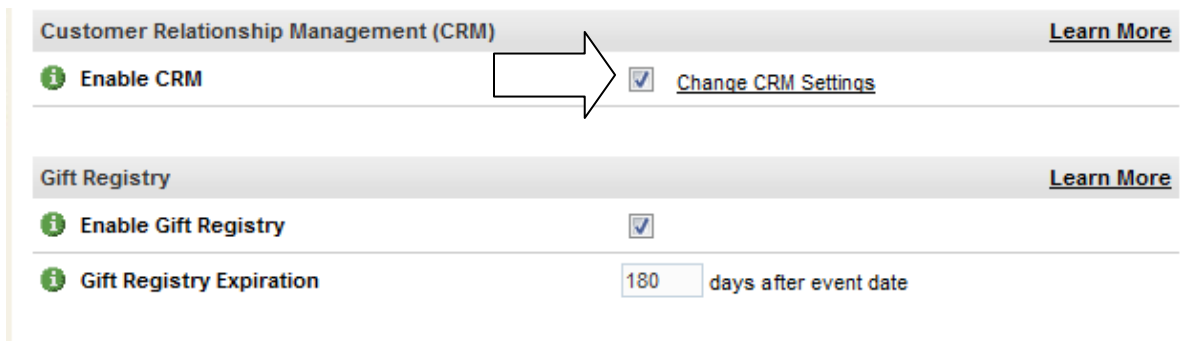
Introduction

The CRM (Customer Relationship Manager) feature allows you to correspond with your customers through a managed ticket system. Customers can contact you through their account on your website and 3dCart will automatically keep a record of all interactions.

Enable CRM

To enable the CRM feature:

1. Go to **Settings – General – Store Modules**
2. In the **Customer Relationship Manager (CRM)** section, check the **Enable CRM** checkbox.
3. Click **Save Changes**.



The screenshot displays the 'Customer Relationship Management (CRM)' and 'Gift Registry' settings sections. In the CRM section, the 'Enable CRM' checkbox is checked, and a white arrow points to it. To the right of the 'Enable CRM' checkbox is a 'Change CRM Settings' link. Below this, the 'Gift Registry' section is visible, with 'Enable Gift Registry' checked and 'Gift Registry Expiration' set to 180 days after event date.

Section	Setting	Value	Link
Customer Relationship Management (CRM)	Enable CRM	<input checked="" type="checkbox"/>	Change CRM Settings
	Learn More		Learn More
Gift Registry	Enable Gift Registry	<input checked="" type="checkbox"/>	
	Learn More		Learn More
	Gift Registry Expiration	180	days after event date

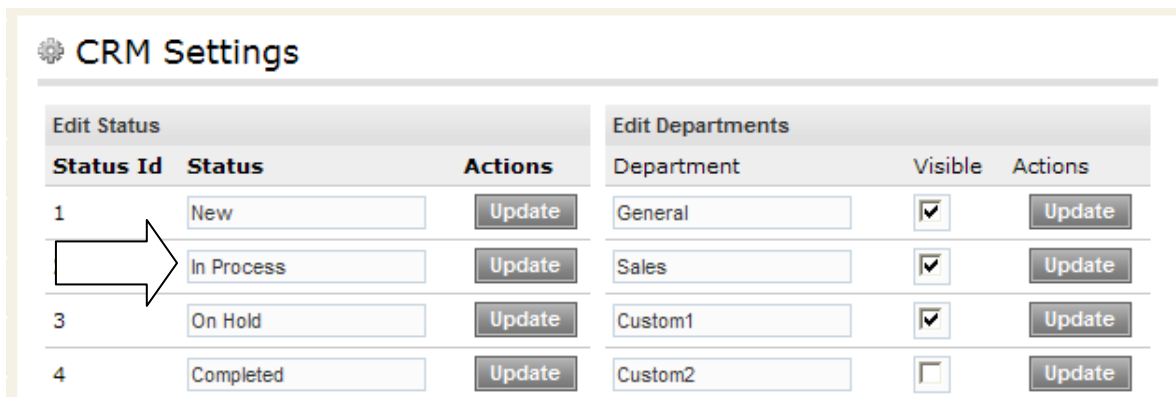
CRM Settings

You can customize the status of your CRM tickets and the departments they can be sent to. Both the Status and Departments will display to your customers.

1. Go to **Settings -> General -> Store Modules**
2. In the **Customer Relationship Manager (CRM)** section, click the **Change CRM Settings** link.



3. Edit the status names in the **Status** field.
4. Click **Update**.



5. Edit the departments available for the customer to choose from to send their CRM tickets to in the **Department** field.
6. Check the **Visible** checkbox next to the departments you would like to display to the customer.
7. Click **Update**.

CRM Settings

Edit Status			Edit Departments		
Status Id	Status	Actions	Department	Visible	Actions
1	<input type="text" value="New"/>	<input type="button" value="Update"/>	<input type="text" value="General"/>	<input checked="" type="checkbox"/>	<input type="button" value="Update"/>
2	<input type="text" value="In Process"/>	<input type="button" value="Update"/>	<input type="text" value="Sales"/>	<input checked="" type="checkbox"/>	<input type="button" value="Update"/>
3	<input type="text" value="On Hold"/>	<input type="button" value="Update"/>	<input type="text" value="Customer Support"/>	<input checked="" type="checkbox"/>	<input type="button" value="Update"/>
4	<input type="text" value="Completed"/>	<input type="button" value="Update"/>	<input type="text" value="Custom2"/>	<input type="checkbox"/>	<input type="button" value="Update"/>

Customer Initiated CRM

Generally, the CRM ticket will be initiated by your customers. To do this the customer will:

1. On your website, they will login to their account by clicking on the **'My Account'** link.

Contact Us **About Us** **My Account** **Affiliate Program** **Gift Registry**

Category

- 14k White Gold
- Charms
- Children and Teens
- Cubic Zirconia
- Cubic Zirconia Bezel Chain
- Gift Certificates
- Other Jewelry
- Pendants
- Samantha

My Account

Returning Customers

Please log in to your account.

Email:

Password:

Log in to my account

2. Once logged into their account, they will click on the **Add Request** link in the **My Last Requests** section.

Track your recent orders. [view all](#)

Date	Order #	Amount	Status
9/1/2008	AB-1477 (View Details)	\$2,020.00	Unpaid
9/1/2008	AB-1476 (View Details)	\$6,887.22	New
9/1/2008	AB-1475 (View Details)	\$4.40	Unpaid

My Address Book [Add New Address](#)

Alias	Details
My Address 1	4109 Mau Mau Lane Delray Beach, FL

My Last Requests (30 days) [Add Request](#)

Id	Dept	Date	Subject	Last Action
No requests in last 30 days				

3. The customer will then fill out the CRM form. They will choose which department to send their request to with their name, phone number, email address, and message.

Add new request [back to my account](#)

Department:

Name: !

Phone: !

Email: !

Subject: !

Message: !

Verification: Type the word above...
 !

Submit Request

4. After the customer sends in their ticket, you, as the merchant, will receive notification via email a CRM ticket has been sent in with a summary of the details.
5. The ticket will be assigned an ID automatically by the system and the customer can login to the **'My Account'** section at anytime to view the status and responses to the ticket.

? **My Last Requests (30 days)** [Add Request](#)

Id	Dept	Date	Subject	Last Action
<u>136</u>	Customer Support	9/4/2008	Customer Service	Customer

Process CRM

To process the CRM ticket:

1. Go to **Customers -> CRM**
2. Click **Open** next to the ticket you would like to view. You will notice that all tickets that need a response from you, the merchant, will be highlighted in yellow. If the ticket is white, then you are waiting on a response from the customer.

CRM

Filter

New (6) In Process (4) On Hold (2) Completed (4)

Records: 6 Page 1 of 1 Display: 15

ID	Department	Date	Customer/Subject	Last Action	Actions
136	Customer Support	9/4/2008	Sam Harris Customer Service	Customer	Open
110	Sales	7/18/2008	danilo alvarenga Question about product	Staff	Open
95	General	4/14/2008	Danilo Alvarenga NEW CRM - PRODUCTION	Customer	Open

3. View the customer request in the **Messages** section.
4. Type your response in the **Message** field under the **Add Response** section.

Ticket #136: Sam Harris

Back Update Info

CRM Informations

Name: Sam Harris Phone: 1800-828-6650 Email: Sam@3dcart.com

Status: New Opened by: Customer Date Opened: 9/4/2008

Department: Customer Support Last Action by: Customer Last Action Date: 9/4/2008

Linked Items: [Customer Record](#)

Add Response

Subject: Customer Service

Message: I am very sorry this happend. I am sending you a \$10.00 gift certificate in the mail to accommodate for this event.

Status: New Add Response

Messages

Date	Message	Sender
9/4/2008 11:56:04 AM	I called your store the other day and one of your employees was not very nice....	Customer

5. Change the **Status** of the ticket if need be.
6. Click **Add Response**.

Add Response

Subject: Customer Service

Message: I am very sorry this happend. I am sending you a \$10.00 gift certificate in the mail to accommodate for this event.

Status: New

Messages

Date ▲		Sender
9/4/2008 11:56:04 AM	I called your store the other day and one of your employees was not very nice....	Customer

7. The customer will receive an email with your response. You can see/edit this email template by going to **Settings -> Design -> Emails**. The email is titled **CRM - Reply**.

Close CRM

Once the CRM ticket has been resolved, you can move it to the closed status.

1. Go to **Customers -> CRM**
2. Click **Open** next to the ticket.

The screenshot shows the CRM main interface. At the top, there is a 'CRM' header with a user icon and a 'Filter' button. Below the header, there are tabs for 'New (5)', 'In Process (5)', 'On Hold (2)', and 'Completed (4)'. A summary bar shows 'Records: 5 Page 1 of 1' and a 'Display: 15' dropdown. A table lists the tickets with columns: ID, Department, Date, Customer/Subject, Last Action, and Actions. The first row is selected, and an arrow points to the 'Open' button in the Actions column.

ID	Department	Date	Customer/Subject	Last Action	Actions
136	Customer Support	9/4/2008	Sam Harris Customer Service	Staff	Open

3. Type any final messages to the customer in the **Add Response** section.
4. Change the **Status** to 'Completed.'
5. Click **Add Response** if you typed a final message, or **Update Info** if you simply changed the status without typing a response.

The screenshot shows the CRM ticket details page for 'Ticket #136: Sam Harris'. At the top, there are 'Back' and 'Update Info' buttons. The 'CRM Informations' section contains fields for Name, Phone, Email, Status, Opened by, Date Opened, Department, Last Action by, and Last Action Date. Below this is a 'Linked Items' section with a link to 'Customer Record'. The 'Add Response' section has a 'Subject' field and a 'Message' text area. At the bottom, there is a 'Status' dropdown menu with options: In Process, New, In Process, On Hold, and Completed. An arrow points to the 'Add Response' button, and another arrow points to the 'Status' dropdown.

CRM Informations

Name: Sam Harris **Phone:** 1800-828-6650 **Email:** Samantha@3dcart.com

Status: In Process **Opened by:** Customer **Date Opened:** 9/4/2008

Department: Customer Support **Last Action by:** Staff **Last Action Date:** 9/4/2008

Linked Items: [Customer Record](#)

Add Response

Subject: Customer Service

Message: Your gift certificate has been sent - please contact us if you need anything in the future

Status: In Process
New
In Process
On Hold
Completed

Add Response

Messages

Date	Sender
------	--------

- The customer will receive an email of your response and they can login to the **'My Account'** section on your website to see the status and correspondence history of the ticket.

Request Details

[back to my account](#)

Customer Service

Status: Completed

Date Opened: 9/4/2008

Department: Customer Support

Opened by: Customer

Last Action Date: 9/4/2008

User/Date	Message
Customer 9/4/2008 11:56:04 AM	I called your store the other day and one of your employees was not very nice....
Staff (samantha) 9/4/2008 2:22:18 PM	I am very sorry this happend. I am sending you a \$10.00 gift certificate in the mail to accommodate for this event.
Staff (samantha) 9/4/2008 2:41:51 PM	Your gift certificate has been sent - please contact us if you need anything in the future

Merchant Initiated CRM

To initiate a CRM ticket with a customer:

1. Go to **Customers -> View/Edit**
2. Click **Edit** next to the customer record you would like to initiate the CRM ticket for.

Customer List Filter

Records: 1 Page 1 of 1 Display: 15

<input type="checkbox"/>	Name ▲	Company	Email	Phone	Enabled	Actions
<input type="checkbox"/>	Harris, Sam	-	Sam@3dcart.com	1800-828-6650	1	Edit

Records: 1 Page 1 of 1 Display: 15

Batch Action: With selected customer(s): Apply

3. Click on the **Actions** button.
4. Click on **Open CRM Ticket**.

Sam Harris Back Actions Save Changes

Info. **Orders (6)** **Products (13)** **Rewards**

Customer Details

Last Update: 8/5/2008 by Danilo A

Login Information

Email: Sam@3d

Password: test Login to Account

Billing Information

Company:

First Name: Sam

Last Name: Harris

Customer Actions close

Delete Customer

Open CRM Ticket

Start Phone Order

5. The ticket will propagate with information from the customer record, but make any changes to the fields if need be.
6. Type a subject for the ticket in the **Subject** field.
7. Type your **message**.
8. Leave the **Email Customer** box checked if you would like the customer to receive an email notification of the ticket.
9. Click **Save Ticket**.

New CRM Ticket Back Save Ticket

CRM Informations

Status:

Department:

Customer Name:

Customer Phone:

Customer Email: Email Customer

Subject:

Message:

10. The ticket can now be managed in the **Customers -> CRM** section. The customer can login to the **'My Account'** section of your website to view the ticket.

END – You’ve reached the end of this guide.

3dCart has many other features not listed on this guide, once your store is up and running continue exploring the features located on the different areas of your Store Manager. If you have additional questions about any of the features you can read the full documentation at <http://help.3dcart.com>; or clicking on the Help Icon from your Store Manager left navigation bar.

Contacting 3dCart

3dCart’s support team is ready and willing to help you. Feel free to contact us at any time and also visit our online knowledgebase and user forums that have many of your questions and issues already answered.

Web: <http://support.3dcart.com>

KB: <http://support.3dcart.com/kb/>

Forums: <http://forums.3dcart.com>

Email: support@3dcart.com

Phone: (800) 828-6650 x 3

Thank you for using 3dCart.

Sincerely,

3dCart Support Team

support@3dcart.com