Livestock Office – Customer Experience Management

27/09/2022

Contents

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Overview

Livestock Office Customer Experience Management Module

Manage your interactions with your current and potential customers.
Centralise customer information, contacts, products, leads, service calls (logs) and activities.
Track your interactions and keep on top of follow-ups.

Fully integrated with automated subscription billing and contract letter generation.
Includes a Bulk Email facility for distributing newsletters and marketing material.

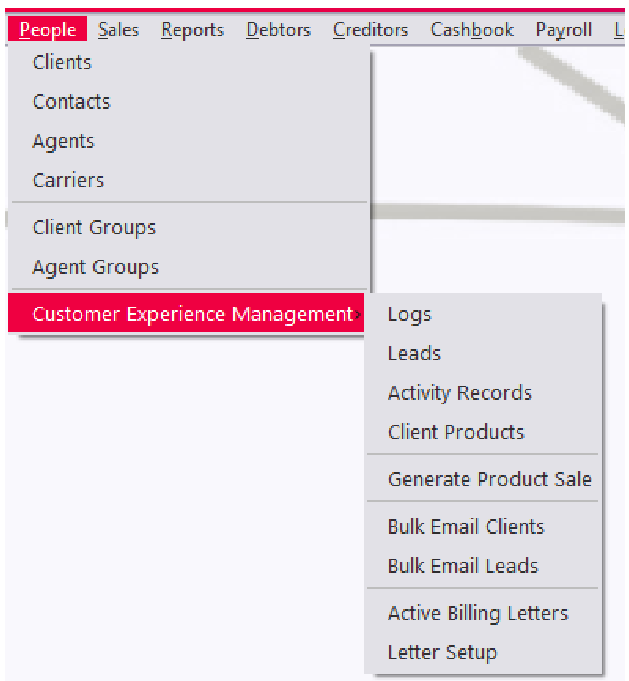


Figure 1: Customer Experience Management Menu

CXM Main Features:

Leads	Record details of prospective customers. Enter and track communication activities and follow-ups.
Clients	Record details of contract numbers, licences, subscriptions, product details etc. Maintain Client Contacts, record and review Activities and Logs.
Create Product Sales	Auto-Generate Private Sales for client products. Automate your period billing for subscriptions and regular charge outs. Create one-off Private Sales directly from the Client Product screen.
Letters and Mailings	Auto-generate contract and subscription letters based on Client Products with active billing.
Logs and Activities	Record service and maintenance calls in logs. Track progress and status.

Team up with the **Document Manage**r to keep all your documents with your customer records.

Leads

Livestock Office main menu > People > Customer Experience Management > Leads

Keep all your leads information in one place, and keep track of activities and follow-ups.

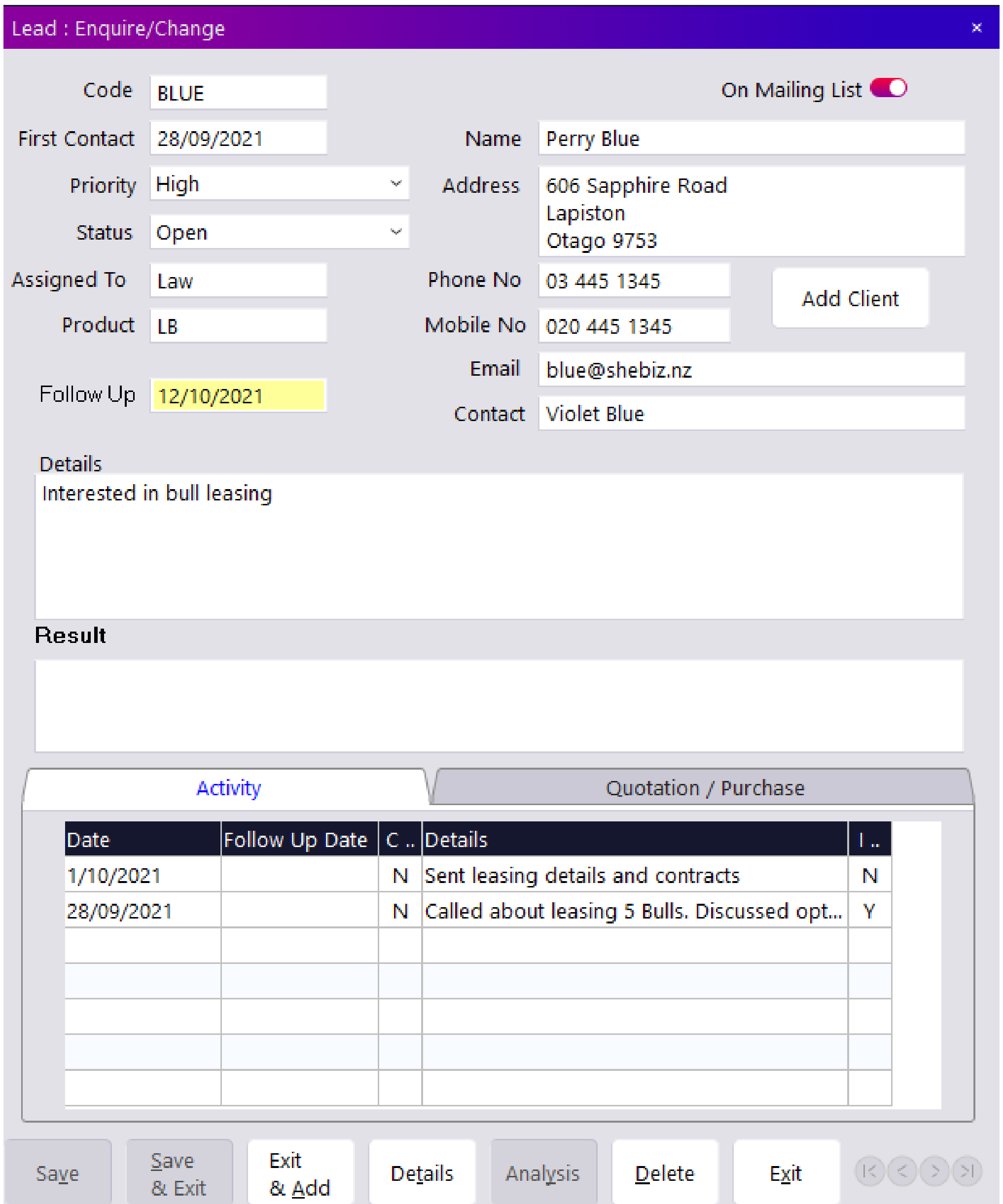


Figure 2: Lead screen

Field	Description
Code	Up to 10 characters Unique code for the Lead
First Contact	Date of the initial contact – default to the current date
Priority	Select the priority from the drop-down list
Status	Select the status from the drop-down list
Assigned To	The user who is the main contact for the lead. Double click or F8 for a list to pick from.
Product	The main Pen Category the potential customer is interested in. Double click or F8 for a list to pick from.
Follow Up	Date • If within 14 days the background will display Yellow • If in the past (overdue) the background will display Red • If greater than 14 days in the future the background will display Green • If no date is entered the background colour will remain Grey *Note:* • *The background colour is also reflected in the Lead Look Up Screen so you can see at a glance the Follow Up status.*
On Mailing List	Used in the **Bulk Email** function to select leads to email.
Name	Up to 52 characters Name of the Lead. Becomes the Client name if this lead is converted to a customer.
Address	Enter up to 4 lines of the address.
Phone No Mobile No	) Enter up to 20 characters)
Email	Up to 200 characters Separate multiple email addresses with a comma
Contact	Up to 30 characters Name of the contact person
Details	Enter any details for this Lead
Result	Enter the Result or Outcome of this lead Also remember to change the status to closed when this lead either becomes a customer or is lost.
Add Client button	Click to create a client record for this lead. The Code, Name, Address, Phone, Mobile, Email and Contact Name will be transferred to the client record and will no longer be editable in the Lead record.

Continued…

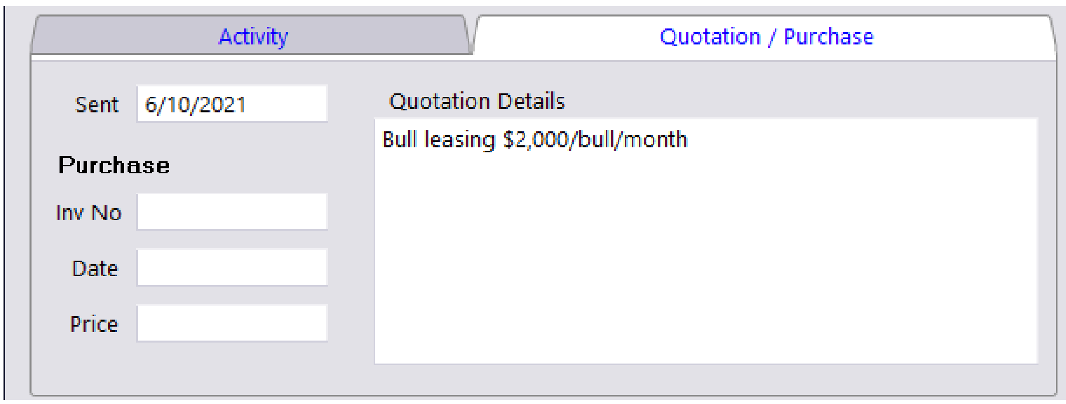
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Activity tab</td><td>See next section for details</td></tr>
<tr><td>Documents tab</td><td>Requires the Document Manager module. Please contact Shebiz Ltd for more information.</td></tr>
<tr><td>Quotation tab</td><td>Enter details of any quotation sent:


Figure 3: Quotation tab</td></tr>
<tr><td>Details button
- Contacts</td><td>Click to access Contacts for this lead

Contacts can be synchronised with Mailchimp to automatically update the Mailchimp Member details when changes are made to the contact.
Member tags are:
'LEAD'
Product Pen category code
Any custom tags entered on the Contact screen.
Please see the Mailchimp documentation for further details:
https://www.shebiz.nz/lohelp/docs/LO_Mailchimp.pdf</td></tr>
</table>

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Lead Activity

Each activity line represents a communication with the lead.
Activity records are listed with the most recent at the top.

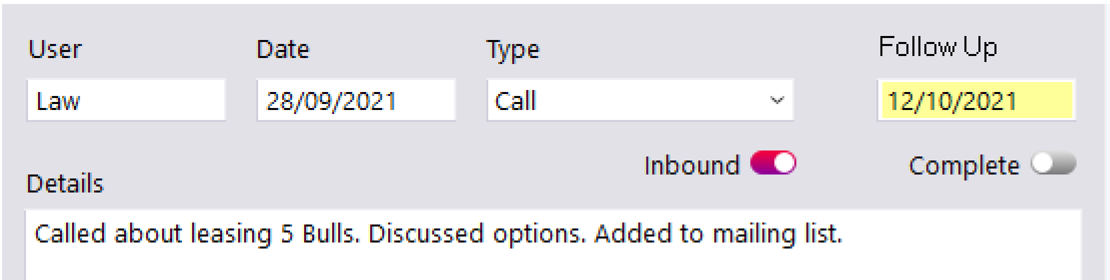

Figure 4: Lead Activity Line

Click on an existing line in the Activity table to open and view/edit the details.
Right click on an existing line or click on a blank line to open a new activity line.

An Email type record will be generated automatically when the Lead has an email sent via the Bulk Email function.
The activity Details will show the email subject.

See Activity section later in this document for full details.

Logs

Livestock Office main menu > People > Customer Experience Management > Logs

Can also be accessed from the **Client** screen via the **Details** button.

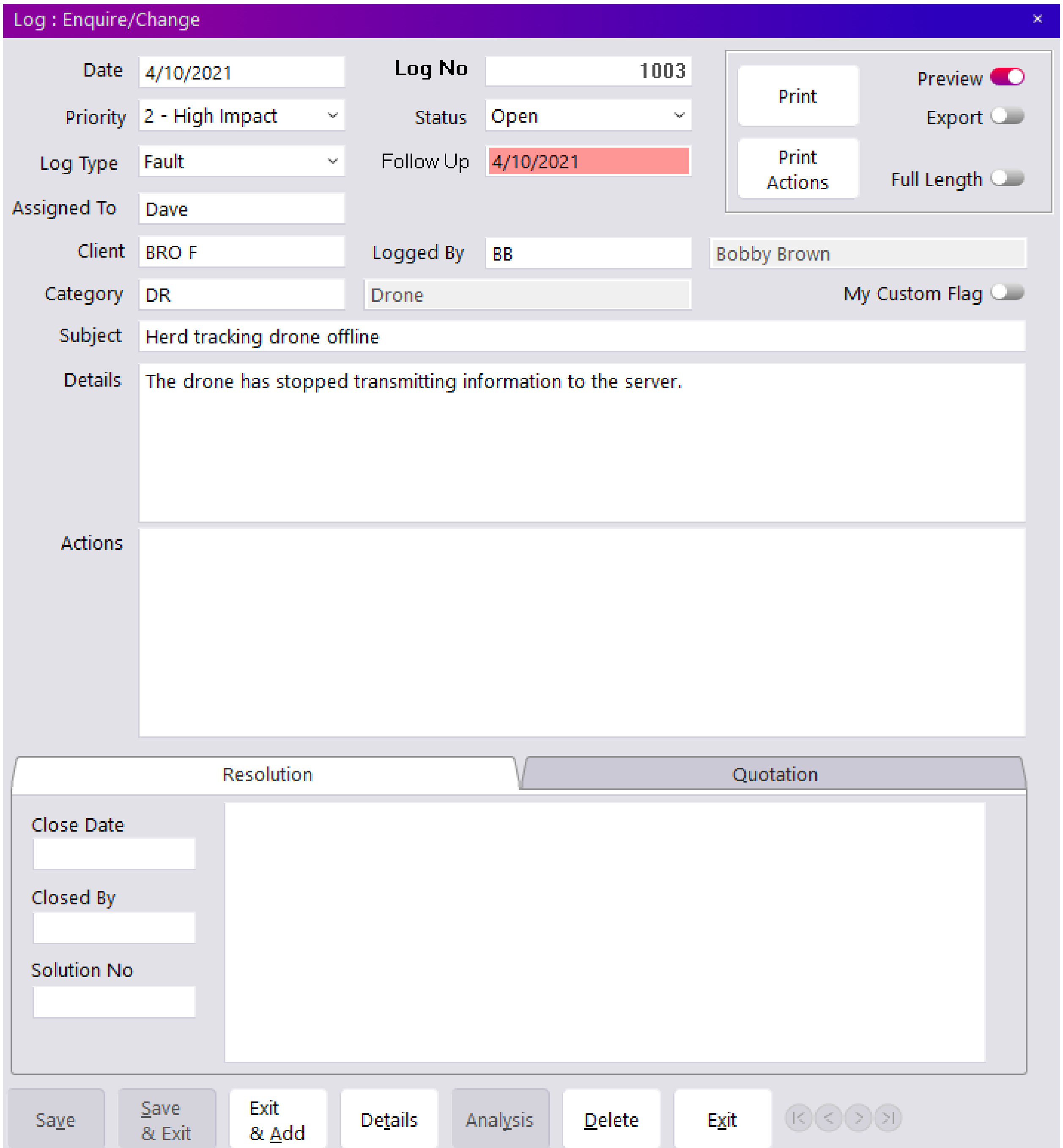

Figure 5: Log screen

Field	Description
Date	Defaults to the current date. F8 or double click for a calendar to pick from.
Log No	Automatically generated unique incrementing log number.
Custom	User defined Set box. Set the text in **Company Details > Other tab > CXM.**
Priority	Choose from Critical, High, Minimal or Low/Advisory. Sets the Follow Up Date based on days set in **Company Details > Other tab > CXM.**
Log Type	Choose a type from the drop-down list.
Status	Choose the appropriate Status from the drop-down list. If **Closed** is selected the **Close Date** will default to the current date and the **Closed By** will default to the user ID of the user currently logged in. If a log is changed from Closed to another status, the **Close Date** and **Closed By** fields will be cleared.
Assigned To	Enter the User ID of the person assigned to this log. F8 or double click for a lookup to pick from.
Client	Enter the client code. F8 or double click for a lookup to pick from.
Logged By	Enter the code of the client contact who initiated the log. F8 or double click for a lookup to pick from.
Category	Enter the pen category the log relates to. F8 or double click for a lookup to pick from.
Subject	Enter a brief summary of the log. Allows up to 120 characters.
Follow Up	Enter the date of the follow up if applicable. Set the default days for each log priority in **Company Details > Other > CXM**. If the priority is changed the follow up date will automatically update using the current date plus the default days for the new priority.
Details	Full details of the log.
Actions	Actions taken to resolve or conclude the log.
Print button	Print the log report. Set Preview or Export if desired.
Prt Actions button	Include the Actions on the log report.
Full Length	Set to print the full details rather than a single page report.

Continued…

Field	Description
Closed Date	Enter the date the log has been closed. Defaults to the current date when a log's status is changed to Closed.
Closed By	The User ID of the person closing the log. F8 or double click for a lookup to pick from. Defaults to the User ID of the current user when a log's status is changed to Closed.
Solution No	Enter up to 20 characters if applicable.
Resolution	Details of the resolution or solution provided.

Quotation tab

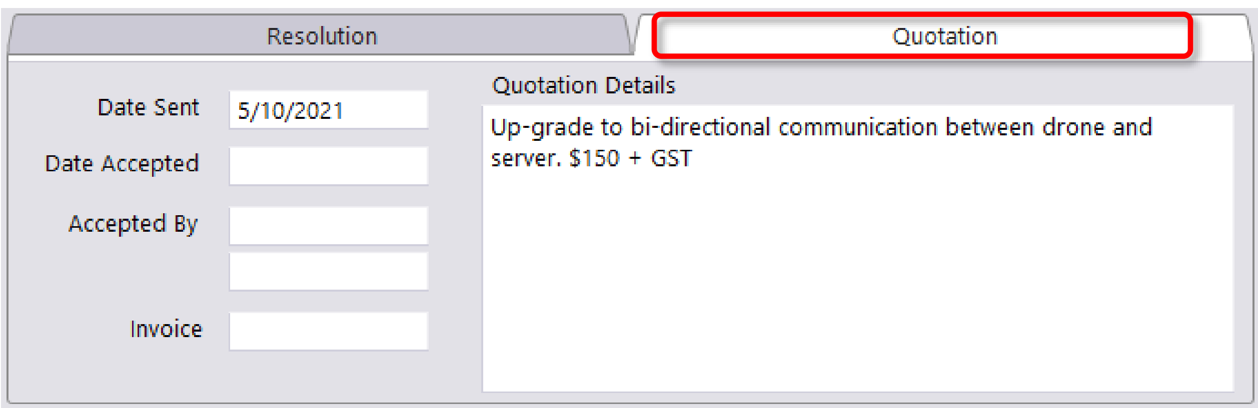

Figure 6: Quotation tab

Field	Description
Date Sent	Date the quotation was sent to the client. F8 or double click for a calendar to pick from.
Quotation Details	Details of the quotation.
Date Accepted	Date the quotation was accepted. F8 or double click for a calendar to pick from.
Accepted By	Code of the Client Contact accepting the quotation. F8 or double click for a lookup to pick from.
Invoice	Invoice No of the Debtor Invoice issued for the quotation. F8 or double click for a lookup to pick from.

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Company Details

Livestock Office main menu > File > Company > Company Details > CXM tab

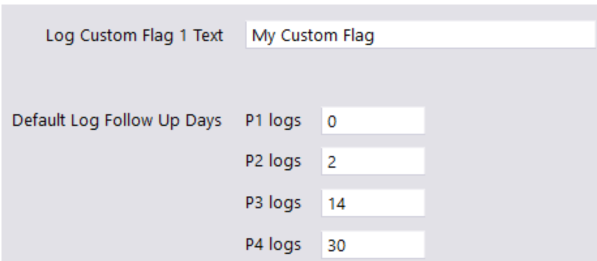

Figure 7: CXM Settings

Enter the custom text to display on the Log screen.

Set the number of days to add to the current date for the default follow up date when entering logs.

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Activity Records

Livestock Office main menu > People > Customer Experience Management > Activity Records

Activities can also be opened directly from Leads and Clients.
Activity records are automatically generated when emails are sent to Clients or Leads via the Bulk Email function.

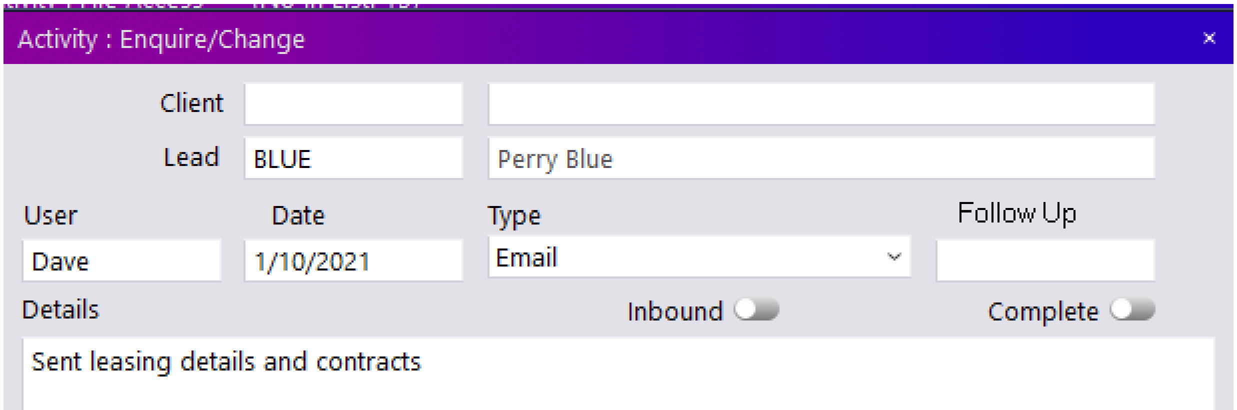

Figure 8: Activity Record

Field	Description
Client) Lead)	Enter the client or lead code for the activity. This will be automatic if an activity is opened directly from a Client or Lead record.
User	User ID of person responsible. Defaults to the user currently logged in but can be overwritten. Double click or hit F8 for a lookup list to pick from.
Date	Defaults to the current date but can be overwritten. Double click orF8 for a calendar to pick from.
Type	Available types: Call, Email, Visit, Website, Social Media, Online Chat, Other.
Inbound	Set if activity was initiated by the Client/Lead
Follow Up	Date – Double click or F8 for a calendar to pick from. • If within 14 days the background will display Yellow • If in the past (overdue) the background will display Red • If greater than 14 days in the future the background will display Green • If no date is entered or **Complete** is ticked the background colour will remain White
Complete	Set once complete to deactivate any follow up emails and disable colour alerts.

Contacts

Livestock Office main menu > People > Contacts

Contacts can also be accessed via the **Main Contact** field on the Client screen and also from the **Details** button on the Client screen.

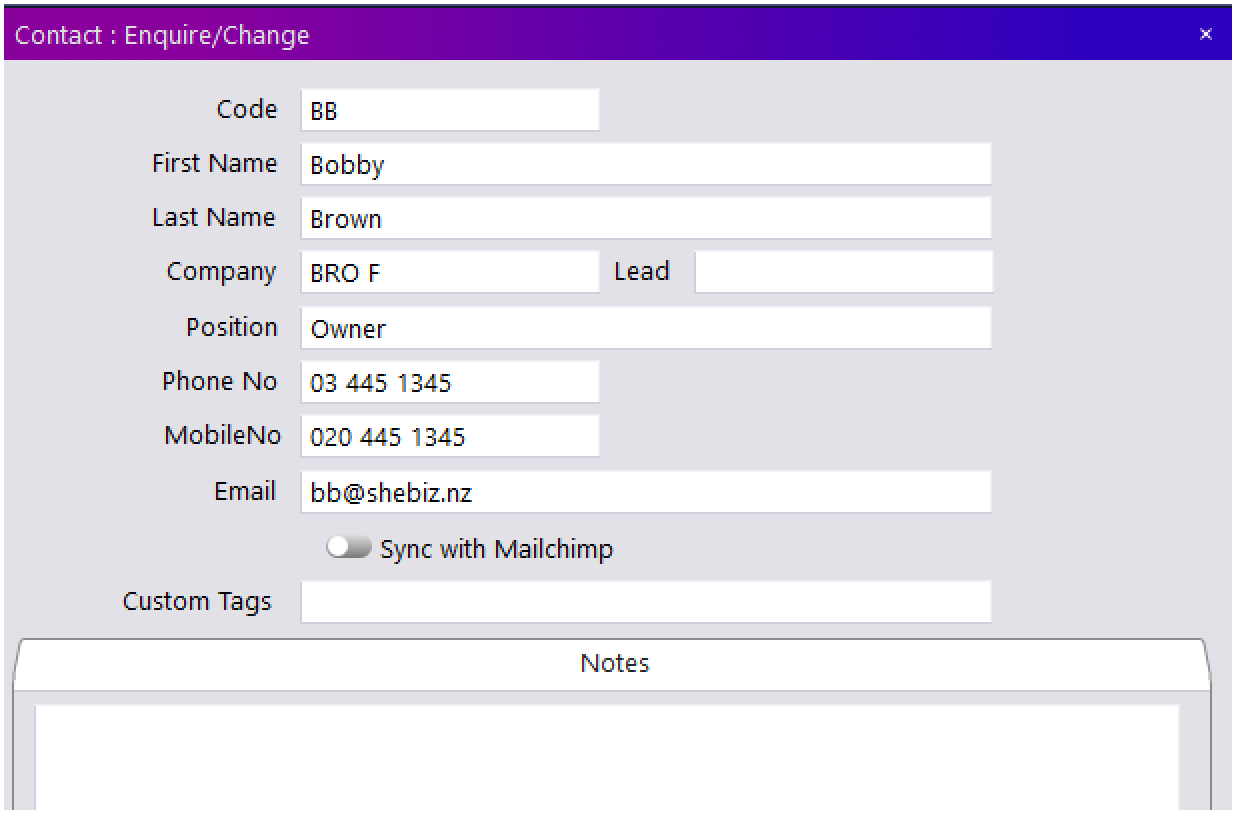

Figure 9: Contact

Enter and save details as appropriate.

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Dashboard

The Livestock Office Dashboard provides a visual overview of CXM data.
Click on the dashboard icon at the bottom right of your Livestock Office application to open the Dashboard options.

Figure 10: CXM Dashboard Options

- **CXM All** – Shows the status of All active Logs and Leads
- **My Leads** – Shows the status of the Leads assigned to the current user
- **My Logs** – Shows the status of the active Logs assigned to the current user
- **My CXM** – Shows the status of the active Logs and Leads assigned to the current user

Click on the options you wish to see. A Set will display beside the selected item.
Click previously selected items to remove it from displaying on the Dashboard.

Clear Dashboard will remove all selected items from the dashboard.

Hide Dashboard will simply hide the dashboard without removing any of the settings. Simply click Hide Dashboard again to remove the Set beside it and show the selected items.

Note:
- *Access to the Dashboard items can be controlled in the User Group.*

Clients

Livestock Office Main Menu > People > Clients

The CXM details are shown on the right side of the Client screen.

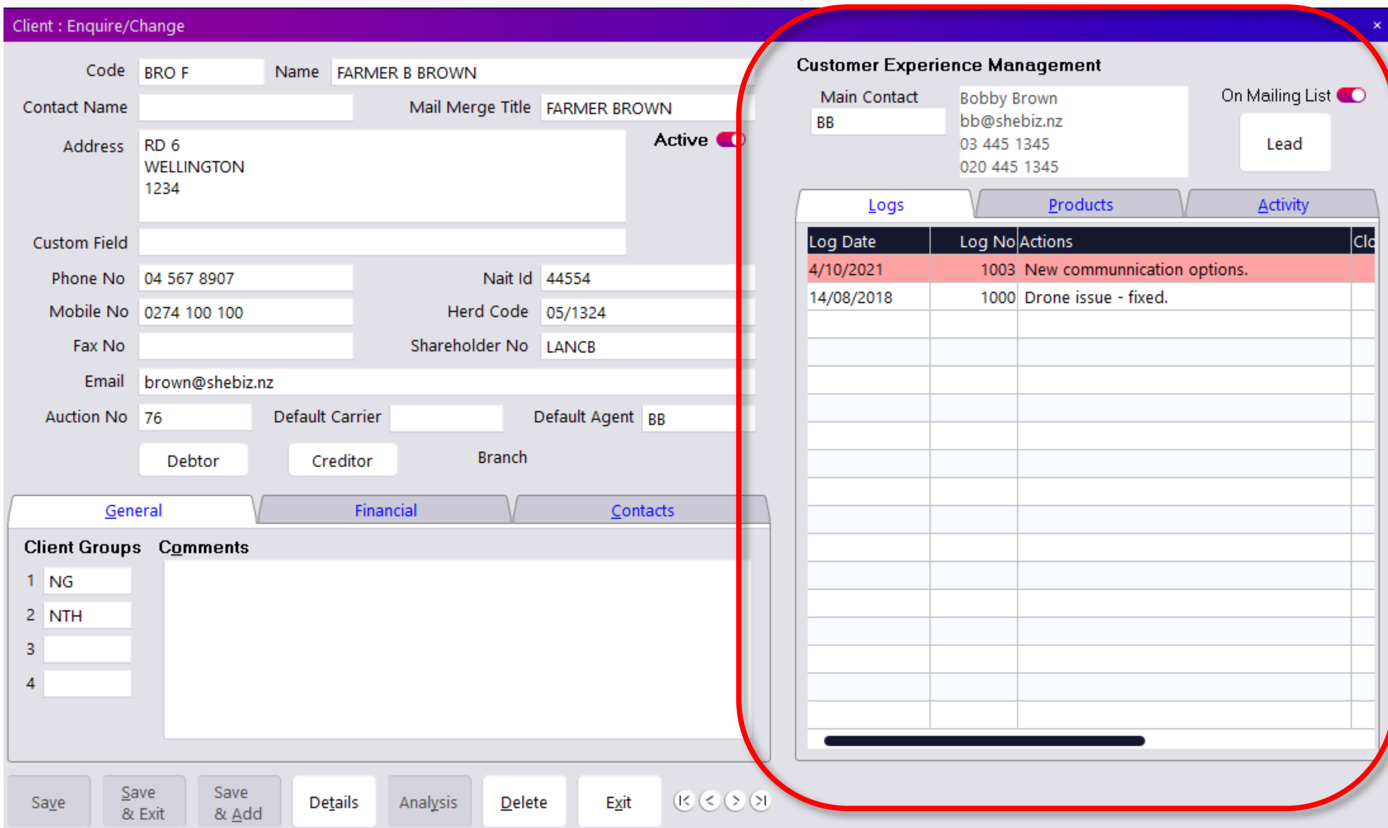

Figure 11: Client CXM Details

Field	Description
Main Contact	The main contact for this client. Enter the code, or F8 or double click for a lookup to pick from.
On Mailing List	Used by the **Bulk Email** function to select Clients to email.
Lead button	Click to open the **Lead** record. If no Lead exists, the caption will be **Add Lead**. Click to add a **Lead** record.
Tabs	Lists the **Logs**, **Products** and **Activity Records** for this client. Tab title will show blue if records exist. Logs show by default on the top sheet, but this can be changed in File > User File.
Logs	Click on an existing line to open an existing log for this client. Click on a blank line or right click an existing line to enter a new log for this client.

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Products

Click on the Products tab on the CXM section of the Client screen.

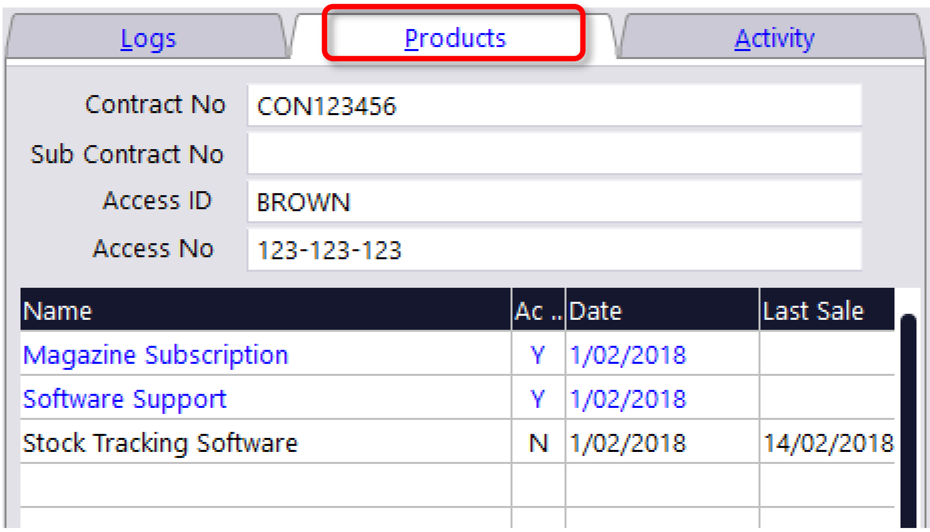

Figure 12: Products tab

Field	Description
Contract No Sub Contract No	) Up to 100 characters.)
Access ID Access No	) Up to 50 characters.)
Products table	Lists the products related to this client. Click on an existing line to view/edit. Click on a blank line or right click on an existing line to add a new product. Lines with Active Billing will show blue on the table.

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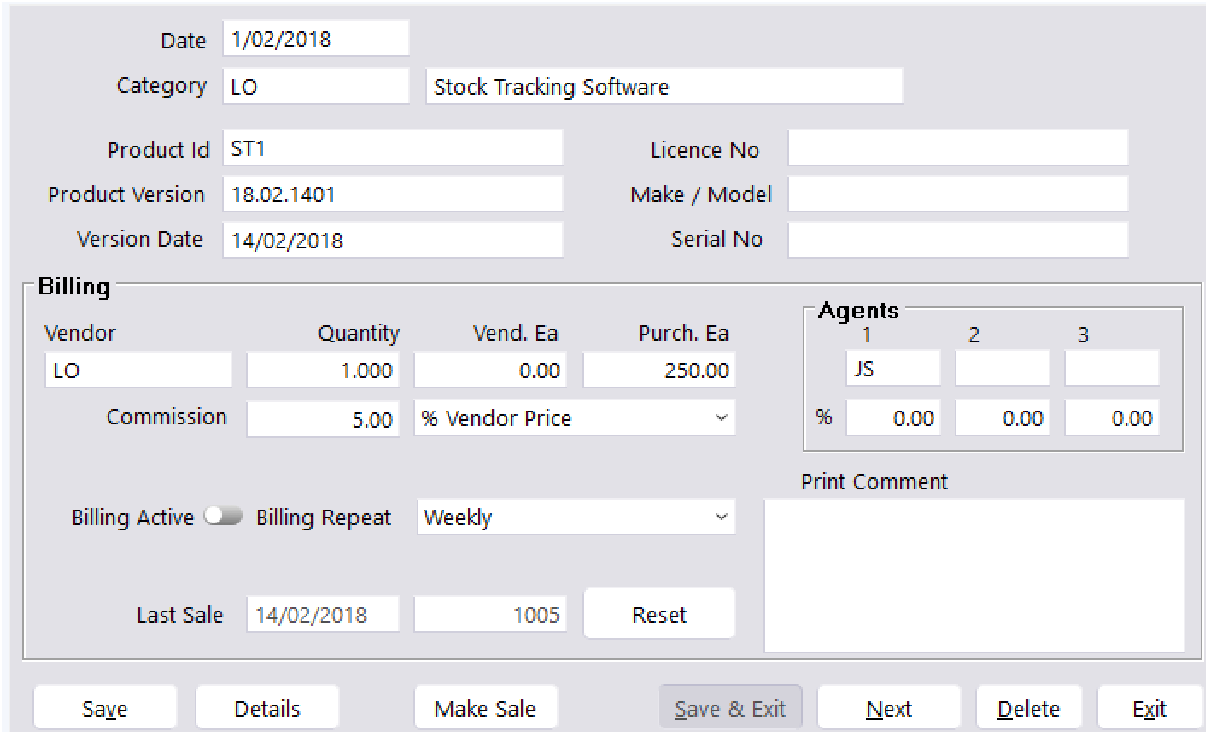

Figure 13: One-off product purchase example

Field	Description
Date Category	Date of first purchase/sign-up. Pen Category for the product. F8 or double click for a lookup to pick from. The default description can be overwritten. The description becomes the description on the sale pen/line of any sales generated
Product Id Product Version Version Date Licence No Make / Model Serial No	))) Enter any details as appropriate.)))
Billing Vendor	Details entered in this section are used to generate a Private Sale. Enter the vendor's code. F8 or double click for a lookup to pick from. Defaults to the current client code so will need changed if client is the purchaser.

Continued…

Field	Description
Billing cont.	
Quantity Vend. Ea Purch. Ea	) Enter the quantity and GST exclusive vendor and purchaser prices.))
Vendor Com	Enter the commission details for the sale transaction.
Billing Repeat	Select the billing frequency from the drop-down list.
Billing Active	Set to mark this as an active billing product line. Enables private sales to be automatically created via the **Generate Product Sale** function. Not required to be ticked to use the **Make Sale** option from this screen.
Agents %	Enter the agents for this sale transaction as appropriate. Defaults to each agent's percentage for Private Sales but can be overwritten so it can be different on each product.
Print Comment	Free text field. Transfers to the Print Comment on the Sale Transaction when a sale is generated and prints on the Debtor Invoice.
Last Sale	Read only – Shows the billed up to date and sale no of the most recent sale.
Make Sale button	Creates a **Private Sale** immediately using the details entered. The client will be the purchaser on the sale. The sale date will default to the current date.

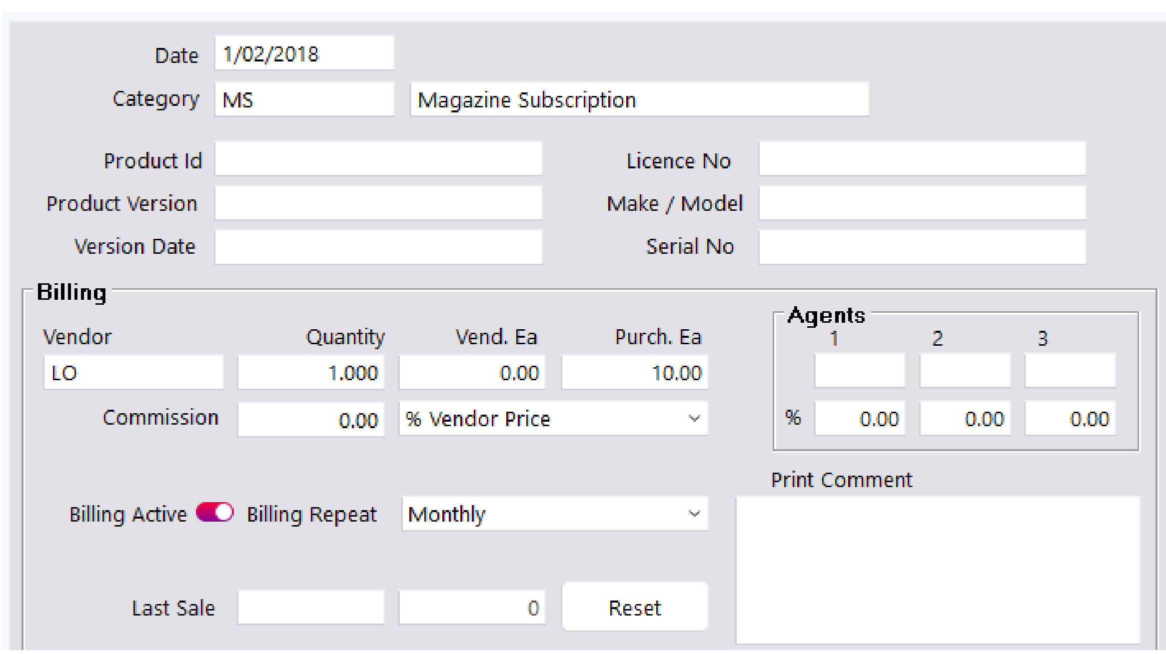

Figure 14: Active Billing example

Client Activity

Access via the **Details** button on the **Client** screen.

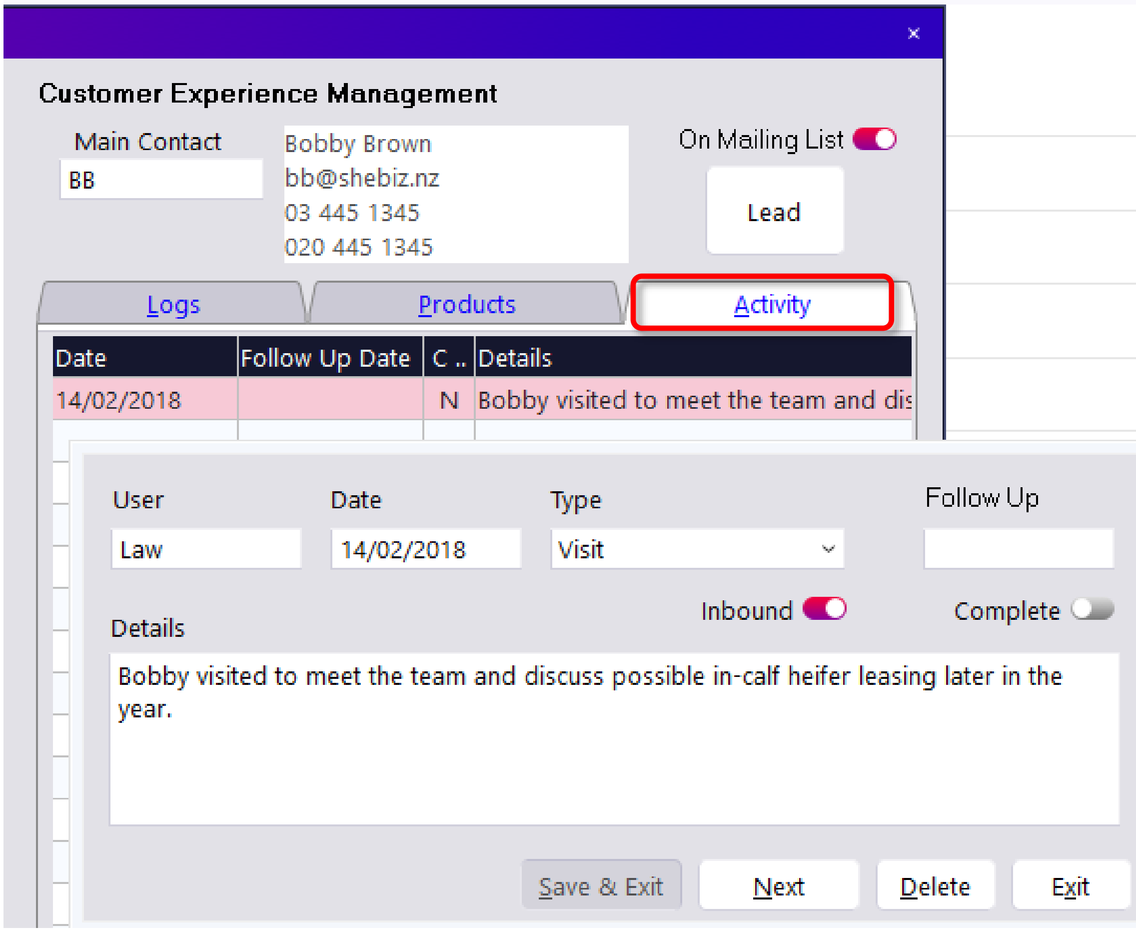

Figure 15: Client Activity

Record details of communications and visits.

An Email type record will be generated automatically when the Client has an email sent via the Bulk Email function. The activity Details will show the email subject.

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Generate Product Sale

Livestock Office main menu > People > Customer Experience Management > Generate Product Sale

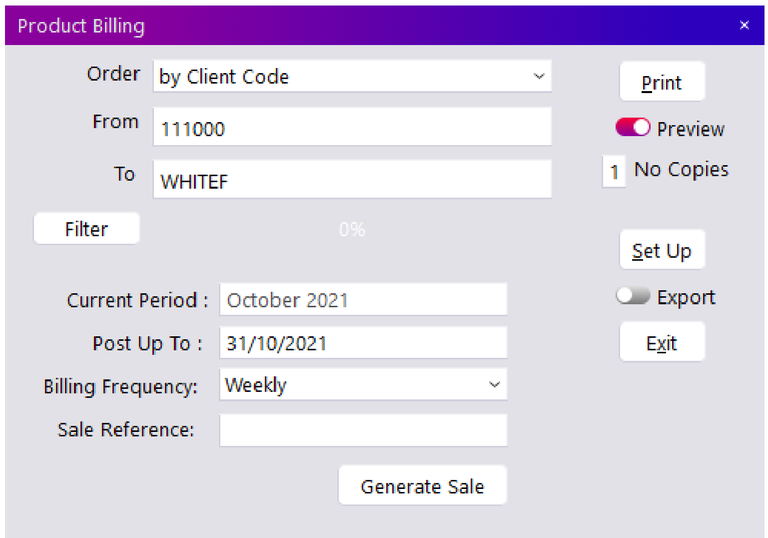

Figure 16: Generate Product Sale

Field	**Description**
Order	Choose the desired Client collection from the drop-down list.
From To	) Enter the start and end codes for the range of clients.) F8 or double click for a lookup to pick from.
Filter button	Click to do a Simple or Full search to filter the clients selected.
Current Period	Displays the current period.
Post Up To	Enter the date you require to post transactions up to. F8 or double click for a calendar to pick from.
Billing Frequency	Select the frequency from the drop-down list.
Sale Reference	Enter a reference for the private sale that will be generated.
Generate Sale	Click to create the private sale. All clients within the selected range with products that have active billing lines due on or before the specified date, matching the billing frequency, will become purchasers on the sale. The vendor will be the client specified on the product line. The sale line pen category description will be the product description. The vendor and purchaser prices will be taken from the product billing information, along with the commission details. Updates the **Last Sale** details on the client product details.

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Field	Description
Print button	Prints the list of clients and their products for the selected criteria.
Preview	Set to Preview the report. Defaults to the user's Print Preview setting in **File** > **User** > **User File**.
No Copies	Enter the number of copies to print. Defaults to 1.
Set Up	Opens the windows Printer Setup dialog box.
Export	Opens the Export dialog box when the **Print** button is clicked. This allows export of the report to Tab Separated Text, Excel, PDF, Clipboard and Email.
Exit	Exit

Generate Sale Listing

Printed 15/02/2018 09:23:17

Page 1

Livestock Office with CXM

Period: February 2018 *Repeat: Monthly* *Up To: 28/02/2018* *Ref:*

Name	Product	Qty	Price Ea	Total
James Bob	Magazine Subscription	1	10.00	10.00
Kelvin Haleyson	Magazine Subscription	1	10.00	10.00
Christine Joyce	Magazine Subscription	1	10.00	10.00
Lacky Frederickson	Magazine Subscription	1	10.00	10.00
FARMER B BROWN	Magazine Subscription	1	10.00	10.00
				50.00

Figure 17: Sample printed report

Bulk Email

Livestock Office main menu > People > Customer Experience Management > Bulk Email Clients
Livestock Office main menu > People > Customer Experience Management > Bulk Email Leads

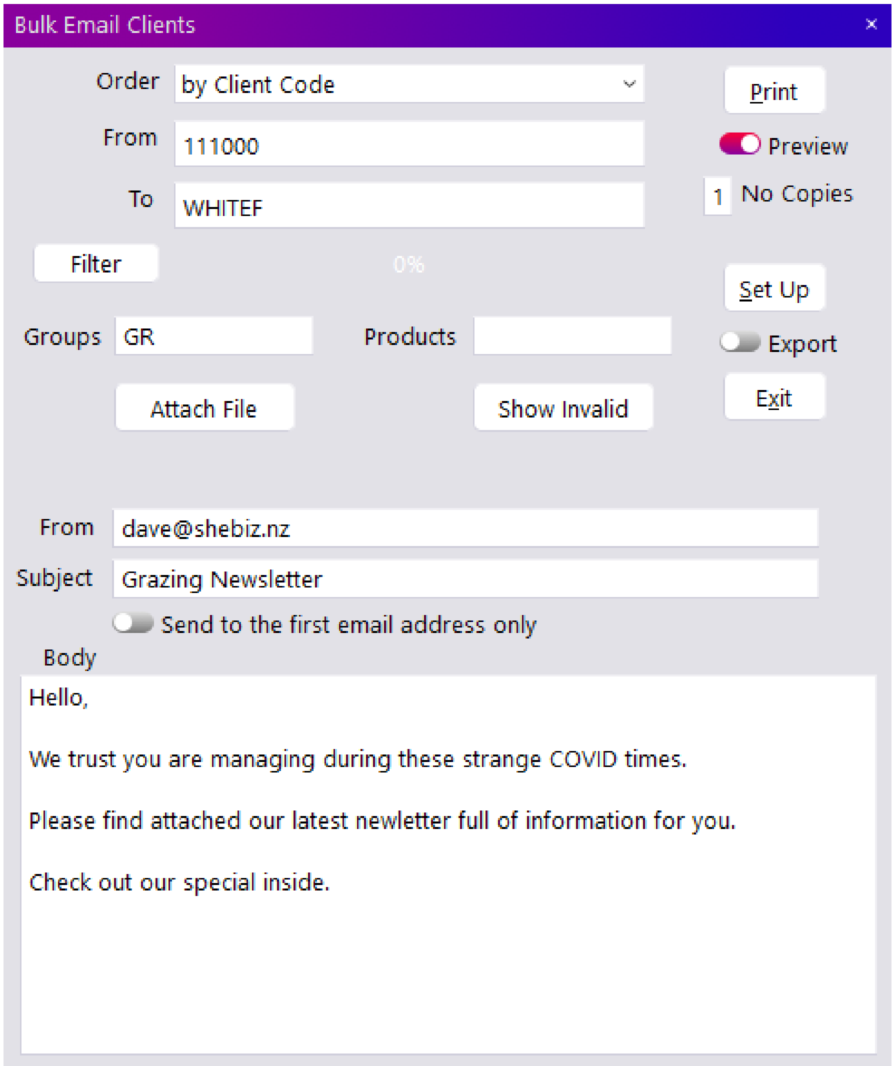

Figure 18: Bulk Email screen

Field	Description
Order	Choose the desired Client/Lead collection from the drop-down list.
From To	) Enter the start and end codes for the range of clients/leads.) F8 or double click for a lookup to pick from.
Filter button	Click to do a Simple or Full search to filter the clients/leads selected.

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Field	Description
Groups / Products	Click to open a Pick List to choose a selection of Client Groups and/or Products. An email will be sent if a client is a member of at least one of the selected groups AND has one of the selected products.
Show Invalid button	Click to check the email addresses of the selected recipients. If any are missing or contain invalid characters, these will be displayed in a lookup screen. Select the recipient and click to Display to open the record and correct the email address.
Attach File button	Click to open the windows file browser and select a file to attach. The file name and size will be displayed.
From	Enter the **From** email address. This will default to the email address for the current user, but can be changed.
Subject	Enter a subject for the email.
Send to the first email address only	Send to the first email address in the range … good for testing.
Body	Enter text for the body of the email. The user's email signature will automatically add to the bottom when the emails are sent.
Print button	Prints the list of clients and their email addresses for the selected criteria. Shows the total number of clients/leads that will be emailed. A client/lead may have multiple email addresses, but this will still only count as 1 in the total.
Preview	Set to Preview the report. Defaults to the user's Print Preview setting in **File > User > User File**. Un-set and click **Print** to send the emails.
No Copies	Enter the number of copies to print. Defaults to 1.
Set Up	Opens the windows Printer Setup dialog box.
Export	Opens the Export dialog box when the **Print** button is clicked. This allows export of the entire report to Tab Separated Text, Excel, PDF, Clipboard and Email.
Exit	Exit

Notes:

- *An Activity record will be automatically generated for the Lead or Client when an email is sent via the Bulk Email function.*
- *Only one email will be sent even if the client has multiple matches on the groups/products.*
- *The client or lead codes of any failed emails will be displayed at the completion of the email send.*

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Active Billing Letters

Livestock Office main menu > People > Customer Experience Management > Active Billing Letters

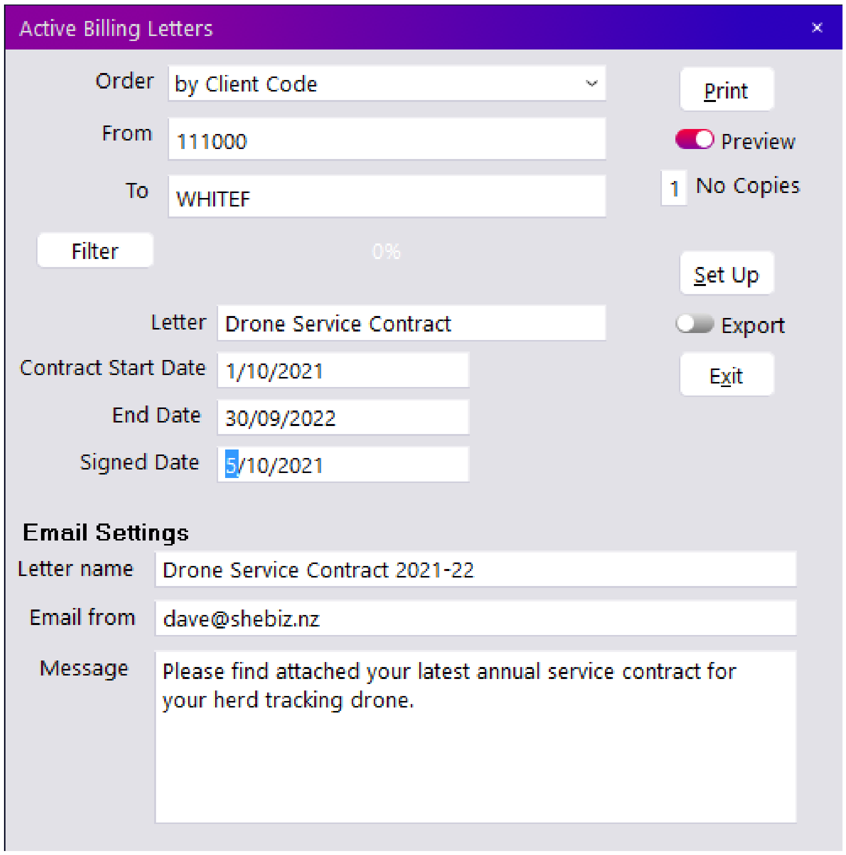

Figure 19: Active Billing Letters

Searches the Client database for active clients matching the search criteria.
Checks for the presence of products with Active Billing. If found, then the letter will print or email using the specified letter format, listing the products, their billing frequency and price.

Letters can be previewed, then remove the **Preview** Set and click **Print** to automatically email the letters to clients with valid email addresses.

Field	Description
Order	Choose the desired Client collection from the drop-down list.
From To	) Enter the start and end codes for the range of clients.) F8 or double click for a lookup to pick from.
Filter button	Click to do a Simple or Full search to filter the clients selected.

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Field	Description
Letter	The letter name. F8 or double click for a list to pick from.
Contract Start Date End Date	) Start and end date for the contract, if applicable.)
Signed Date	Date for the signature if applicable.
Letter Name	Used in the email Title, Body and attachment name.
Email From	Enter the From email address. This will default to the email address for the current user, but can be changed.
Message	Free text area for a custom message to entered. The users email signature will print under the custom message.
Print button	Print the letters for the selected criteria.
Preview	Set to Preview the report. Defaults to the user's Print Preview setting in **File > User File**. Un Set to **Print** to send the emails.
No Copies	Enter the number of copies to print. Defaults to 1.
Set Up	Opens the windows Printer Setup dialog box.
Export	Opens the Export dialog box when the **Print** button is clicked. This allows export of the report to Tab Separated Text, Excel, PDF, Clipboard and Email.
Exit	Exit

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PO Box 78
Cromwell

DRONE SERVICE CONTRACT

Contract between:

Livestock Office with CXM PO Box 78 Cromwell	and	FARMER B BROWN RD 6 WELLINGTON 1234

From: Friday, 1 October 2021 To: Friday, 30 September 2022

Terms of Contract:

LO agree to supply, service and maintain drones used in conjunction with the Herd Tracking software.

In case of Mechanical failure, the drone must be returned to the supplier for repair. A replacemnet drone shall be supplied at no cost.

For technical issues, LO will send a service technician to site within 2 working days.
Software issues will be investigated and resolved if possible using remote desktop software within 2 working days.

More terms and conditions...

Current Subscriptions:

Magazine Subscription	Monthly	$	10.00
Software Support	Quarterly	$	40.00

Prices exclude GST.

Signed: **Diana Prince**
Livestock Office with CXM
Dated: 5/10/2021

Figure 20: Sample Letter

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Letter Setup

Livestock Office main menu > People > Customer Experience Management > Letter Setup

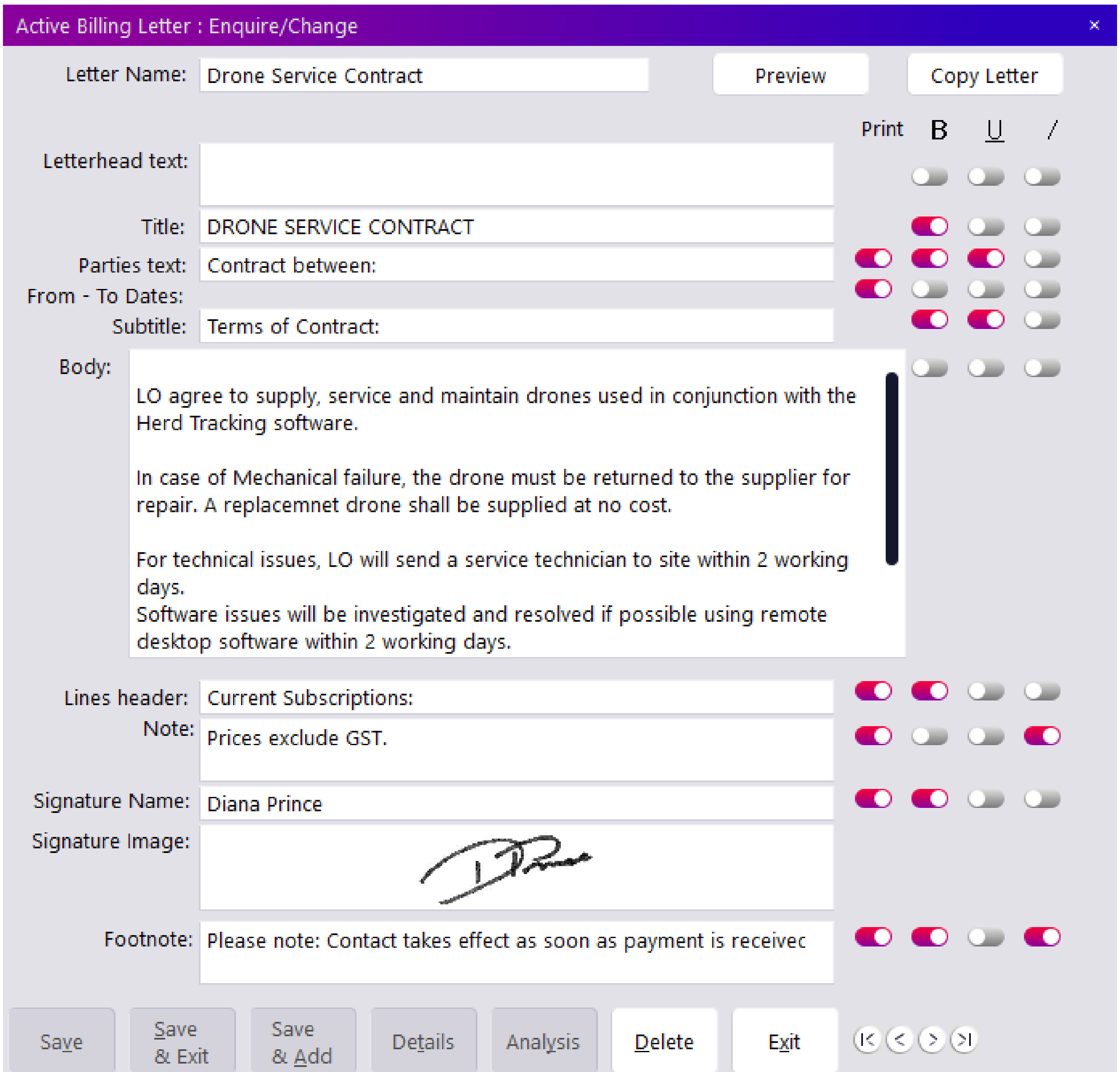

Figure 21: Letter Setup

- Enter details as appropriate.
- Use the **B** <u>U</u> *I* set boxes to apply specific formatting to parts of the letter.
- Use the **Print** checkbox to activate/deactivate specific sections.

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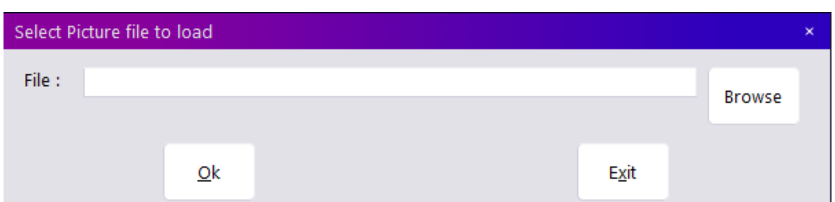
Field	Description
Letterhead text	The Company Name prints at the top of the letter followed by the remit to address. You can enter different details here to print an alternative to the remit to address.
Preview button	Click to preview the saved letter using generic data.
Copy Letter button	Click to generate a copy of this letter. The new letter will have the same name with an incrementing number appended. Edit, rename and save as appropriate.
Title	Prints centred beneath the letterhead.
Parties text	Set the Print checkbox to activate the parties section. Enter text for the header before the parties are listed if desired. The name and address of your company and the client will print in boxes.
From – To Dates	Set the Print checkbox to activate.
Subtitle	Heading before the body text. Leave blank to not print.
Body	The main body text of the letter. Use **Shift + Enter** to insert a blank line.
Lines header	Set the **Print** checkbox to activate. Enter text for the header before the parties are listed if desired. A full width underline will print followed by the product lines with active billing.
Note	Set the **Print** checkbox to activate. Enter any notes to print following the completion of the active billing lines. A full width underline prints after this.
Signature name	Set the **Print** checkbox to activate the signature section. Enter the Name of the person or entity for the signature.
Signature image	Upload an image of the signature if desired. Double click on the field to browse to the image file and load:  Once an image is loaded, you can double click it to view, clear or save to file.
Footnote	Set the **Print** checkbox to activate. Enter up to 2 lines to print in the footer of the letter.

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Auto-Email Follow Ups

Logs, Leads and Activities that have a follow-up date entered can be automatically emailed to the user assigned to the log, lead or activity.

Emails can be sent when logs, leads and activities are due and when logs, leads and activities are overdue.

Livestock Office main menu > File > System > System > System Functions

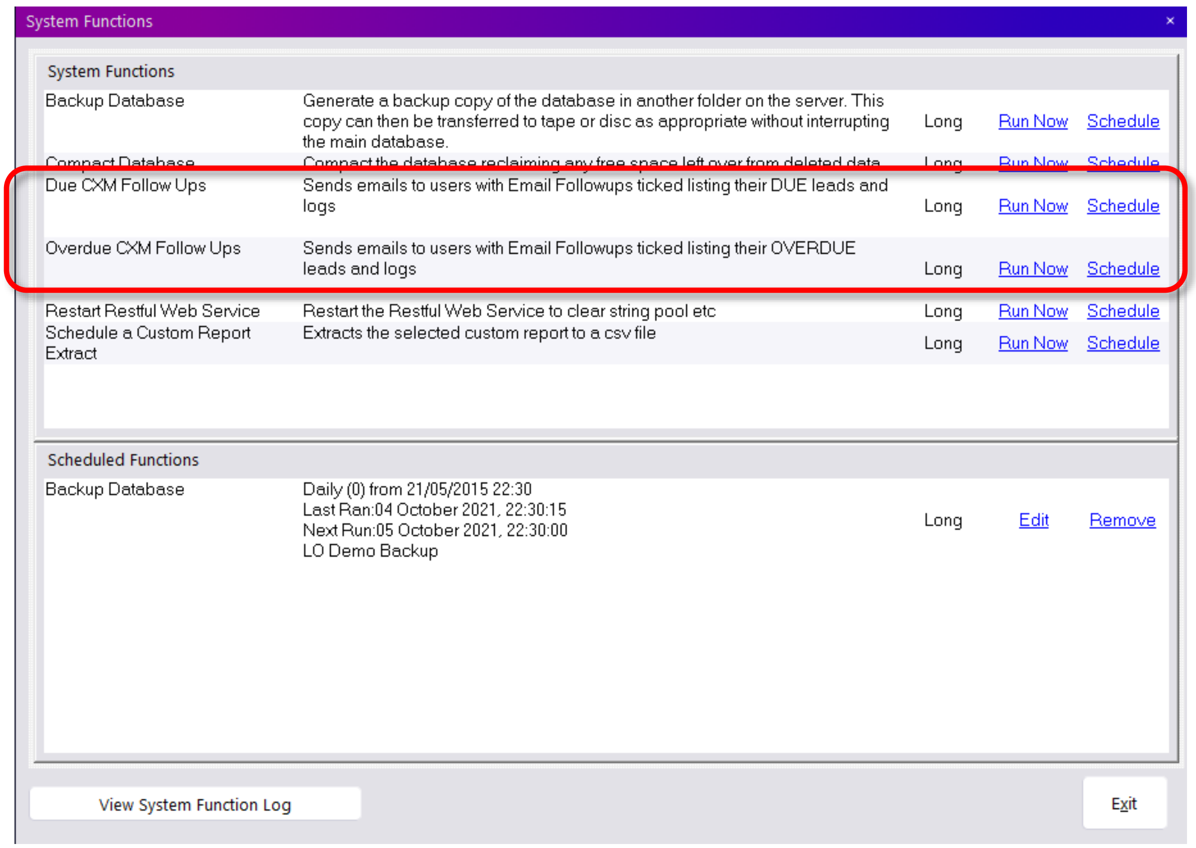

Figure 22: CXM Follow Ups

Click Run Now to run immediately.
Click Schedule to configure a regular schedule for sending the emails (see below).

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For users to receive emails they must have **Email FollowUps** ticked on their User File:

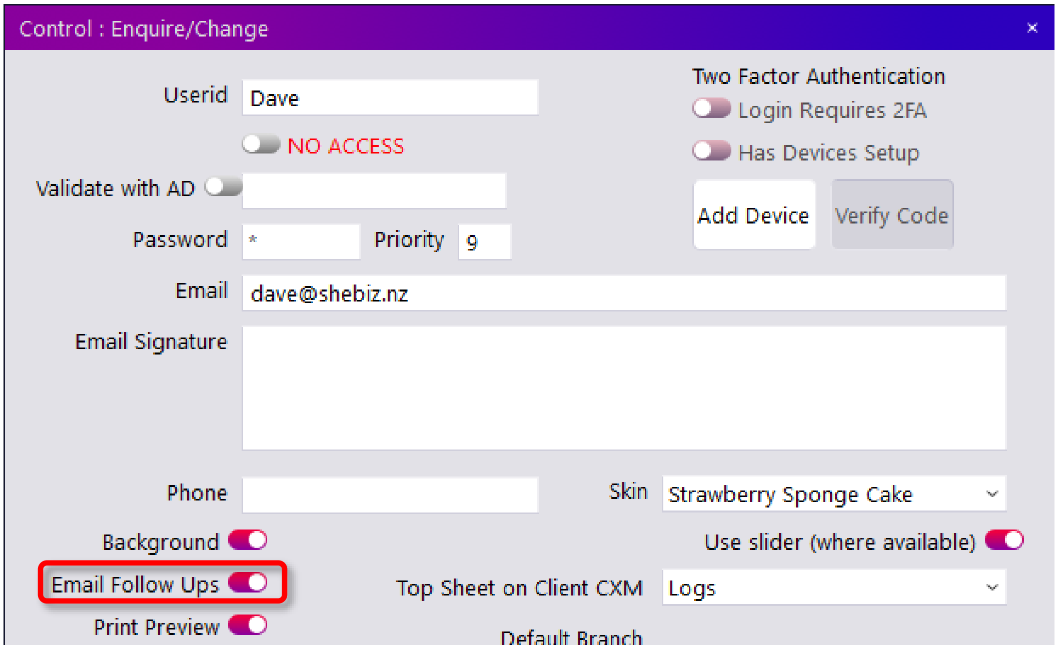

Figure 23: Email FollowUps on User File

Schedule Job

Livestock Office main menu > File > System > System Functions

Click Schedule to configure a regular schedule for sending the emails.