First Steps in eWay-CRM®

eWay-Book

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First Steps in eWay-CRM®

Content

Introduction

eWay-CRM® is a CRM software integrated into Microsoft Outlook. It helps companies from all over the world to manage customers, business opportunities, projects, and marketing campaigns.

The objective of this eWay-Book is to show you the very basics. We will go through the user interface and create the first data.

This eWay-Book is great for all who start with our CRM system.

eWay-CRM® Functions

eWay-CRM® helps your business in these six areas:

Functions	Description
Contacts & Companies	Organize contacts and build relationships with your business partners.
Sales	Find business opportunities, take advantage of workflows, and turn leads into sales.
Projects	Manage projects, assign tasks, control budgets, meet deadlines, and deliver.
Marketing Campaigns	Target your audience, send bulk emails, and analyze the feedback.
Quotes & Billing	Create proposals and invoices in eWay-CRM® and keep track of them.
Timesheets & Planning	Track employee time, oversee costs, and allocate your resources wisely.

Each agenda can be activated or deactivated due to your needs in the Administration Center. Based on your choice, you will see only these modules in eWay-CRM® that are related to your functions.

Architecture

A classical approach separates the applications into two categories - "Thick Client" and "Thin Client". Thick client is a traditional discrete application that runs entirely within the user's PC. The thin client is usually represented by the internet browser connected to a web application that stores all information.

eWay-CRM ® technology uses Smart Client technology, which combines the pros of both the above-mentioned solutions. Users can use a fully-fledged graphic interface; the application can dynamically react to input from the user and use local resources. At the same time, the application is easily upgradable, and most importantly, the application ties in existing clients with whom the user is clearly acquainted - mostly through the MS Office application.
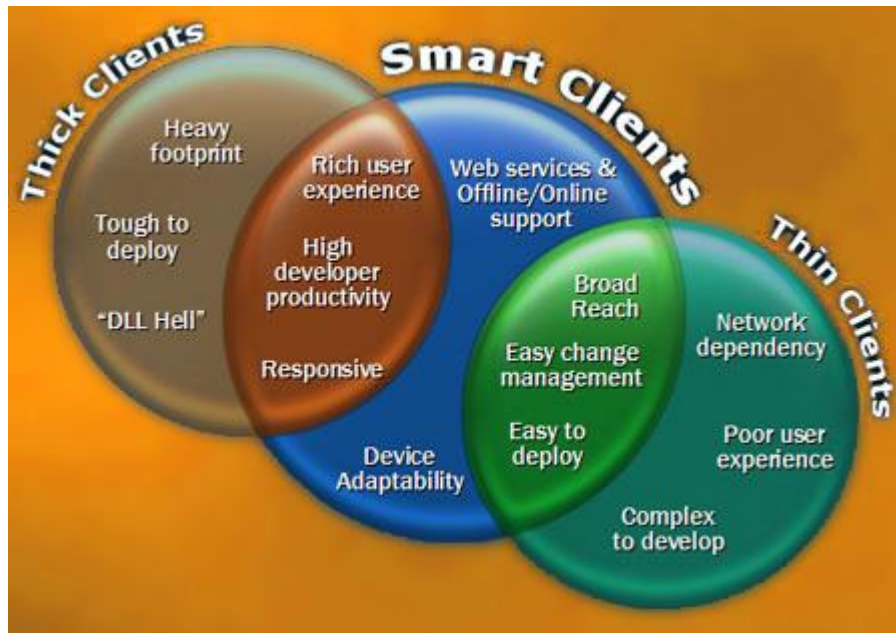
Application of Smart Client type has these features:

Integration to the Current User Interface
The application runs within the host application (MS Outlook, MS Word, MS Excel, etc.) and is fully integrated into its user interface. The user is not exposed to a new, unknown interface, the current interface simply integrates the new functionality.

Application Uses Local Resources
The application utilizes local sources (processor, RAM), as well as the local periphery (phone, fingerprint reader, barcode reader, etc.). The application can also work easily with files stored on your hard disk.

Connection with Server
The application never runs alone and is always part of a bigger distributed solution. All data with which the application works come from the server. The application communicates with the server using the XML Web services technology.

Offline Work
Because the application runs on the client's computer, it does not rely on a constant connection to the server. If the connection is not available, the user can continue to work with the application. After the restoration of the connection, all data will be automatically synchronized with the server.

Automatic Updates
.NET Framework technology allows automatic actualization of individual modules while ensuring consistency across the application. The application checks for new updates and offers the user the opportunity to download the new version, or it can update automatically. This ensures that the user is always working with the latest version.

eWay-CRM® for Outlook

The client application in eWay-CRM® is based on the Smart Client technology (described earlier). The eWay-CRM® information system uses the **Microsoft Outlook** Add-in technology, and thanks to that, it is fully integrated with MS Outlook. This integration guarantees a high level of user comfort.

After the installation of eWay-CRM® into MS Outlook, two toolbars appear. The toolbars are the basic controlling elements of the application and thanks to them eWay-CRM® is always at hand. Just one click the familiar interface and you are ready to work with your data from eWay-CRM®.

The client part of eWay-CRM® also offers very good integration with other programs from the MS Office package via **Microsoft Word and Excel** Add-in. Because of this, it is possible to open documents from eWay-CRM® directly into associated applications (MS Word, MS Excel, MS PowerPoint, etc.) and similarly it is possible to save documents created in MS Word or Excel directly into eWay-CRM® without a need to save documents unnecessarily to your local hard disk.

eWay-CRM® Mobile

eWay-CRM® Premium also contains a mobile application for Android and iOS in some subscription plans. This is an independent application that is not reliant on Microsoft Outlook.

eWay-CRM® Mobile respects Smart Client technology and supports offline mode.

eWay-CRM® Web

eWay-CRM® Premium also contains web access in some subscription plans. It is an online system that is accessible from your web browser. This version needs online access to the Internet.

Server Part of eWay-CRM®

The eWay-CRM® information system does not only consist of the client application integrated to MS Outlook but also contains the server part. The server enables effective work with data from eWay-CRM® with more clients in different locations. The server part of the eWay-CRM® application comprises a data repository (mostly MS SQL Server databases) and a web service that allows communication between the data repository and particular clients.

Cooperation Between Server and Client Parts of eWay-CRM®

Communication is ensured via SOAP technologies (Simple Object Access Protocol) which use the HTTP or HTTPS protocol for sending messages in the XML format. Thanks to this solution, the maximum compatibility, and transmittance in most web interfaces are guaranteed.

An indispensable part of the eWay-CRM® system is eWay Agent. eWay Agent runs in the background and automatically synchronizes local data with data on the server. This function ensures the accuracy of the displayed data. eWay Agent has three basic statuses:

- **online** – all items are synchronized, data on the client are up to date
- **synchronizing** – items are synchronized with the server at that moment
- **offline** - connection to the server is not available; as soon as a connection is restored items will be synchronized

Cooperation between the client and server part (client/server architecture) of eWay-CRM® is displayed in this chart:

Web   PC with Outlook Addin   iOS / Android
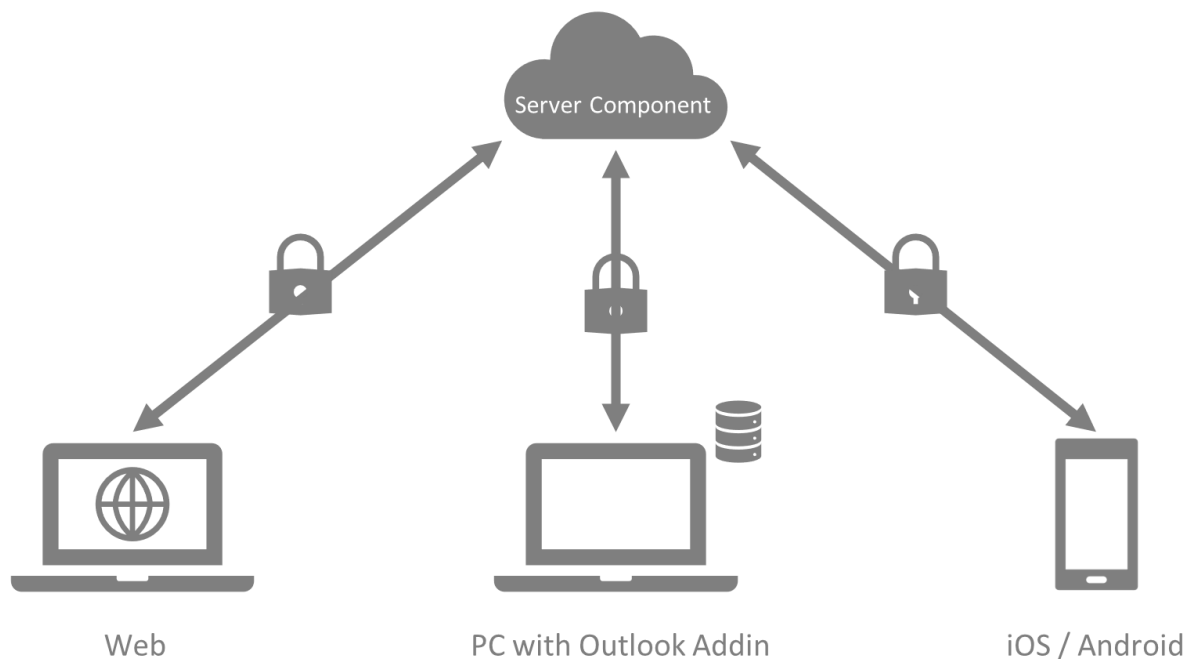
User Interface – First Look in Microsoft Outlook

eWay-CRM® is an add-in for Microsoft Outlook. It extends the Outlook main ribbon of new modules so that you can quickly access the company database. The eWay-CRM® appearance can vary depending on what version of Microsoft Outlook you use. We always accommodate to the look of your Outlook to provide one single piece of software you work with. Let us take a look at how eWay-CRM® looks inside Microsoft Office 365.

Overview
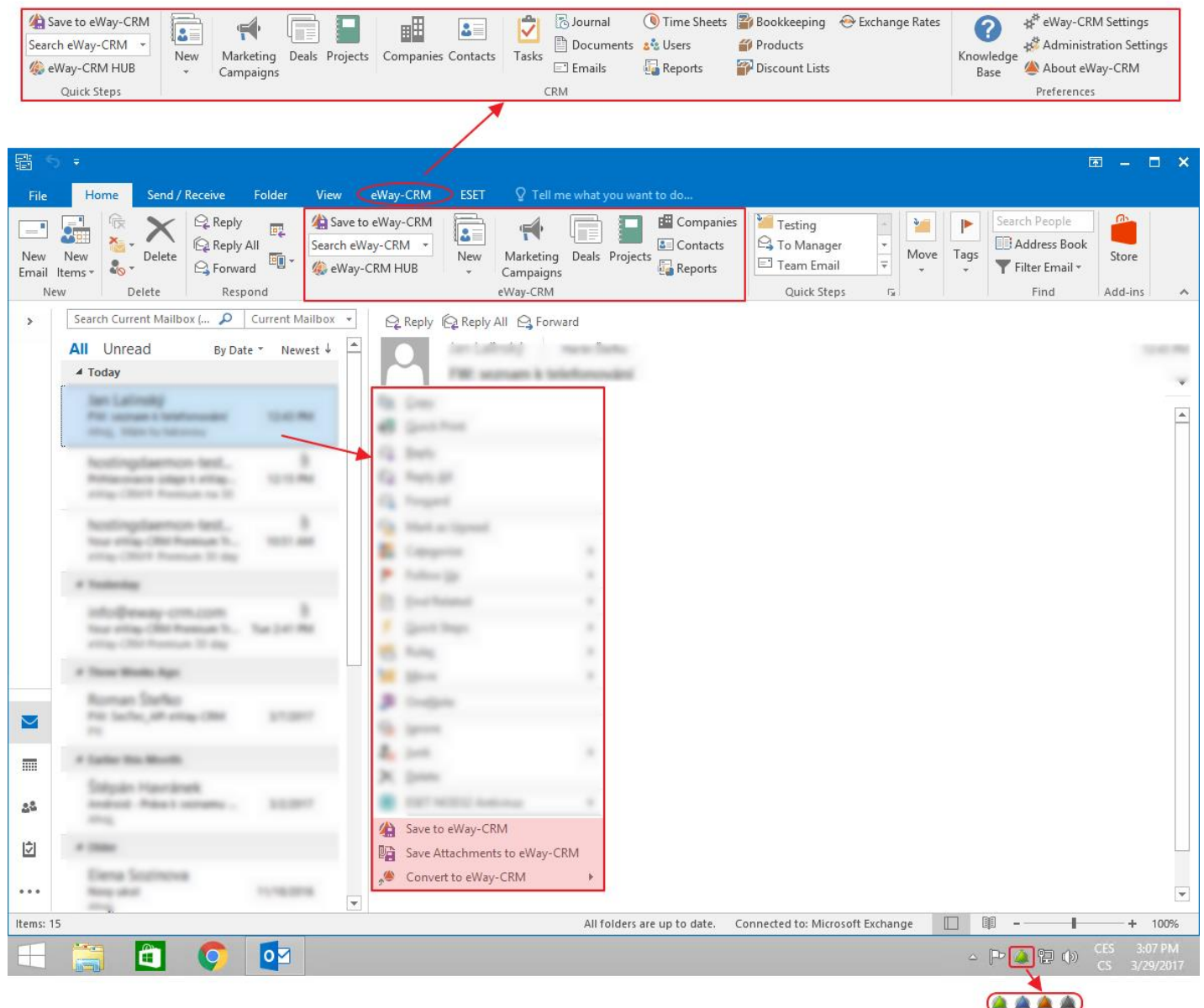
eWay Agent

eWay Agent is a process that runs in the background and provides automatic synchronization of data between the server and the eWay-CRM® Outlook add-in. It is represented as a small icon in the Windows system tray area. The icon changes color according to its status. eWay Agent has these basic four statuses (the first column is showing the standard design of the eWay Agent; the second column is showing images in the case that your license will expire in seven days or earlier):

	All items are synchronized. Your data is up to date.
	Synchronization in progress.
	Error. Please contact our support.
	eWay-CRM® is offline – no data is synchronized with your server / Cloud and you only work with the local database. To put it back online, right-click on it, and uncheck "Work offline".

Note: In the case your license expires, you will be informed not only by the exclamation mark over the eWay Agent icon but also by the bubble above the eWay Agent.

If the license is expired, you will be informed by the tooltip (see picture below) and eWay Agent turns red. **From this moment, the synchronization is not available!**
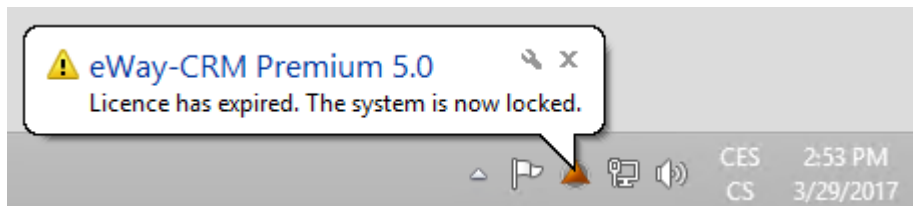
Synchronization Did Not Pass for More Than 3 Days

eWay Agent gives you information not only of the synchronization process, the status of eWay-CRM® but also of the fact that synchronization did not pass in a longer period. If the synchronization did not pass for more than 3 days, eWay Agent would show the bubble that informs you about this situation. Based on this notice, you can try to process the synchronization, find out the malfunction or arrange the help.

Ribbons in eWay-CRM®

eWay-CRM® is fully integrated with Outlook ribbons in which you can find the most frequently used functions of the system. This gives you quick access to the most important modules. A full list of functions can be found in the eWay-CRM® tab.

eWay-CRM® Tab

This tab comprises an extended list of system modules and access to Settings, Administration Settings, and eWay-CRM® help.

Minimize the Ribbon

In the right bottom corner of the ribbon, there is a button for its simplified version.
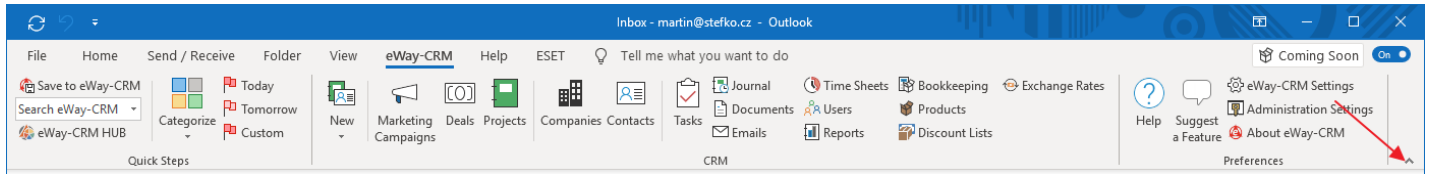
When you click the icon and you are using Microsoft Office 2019 or Microsoft Office 365, the ribbon will change to this form:
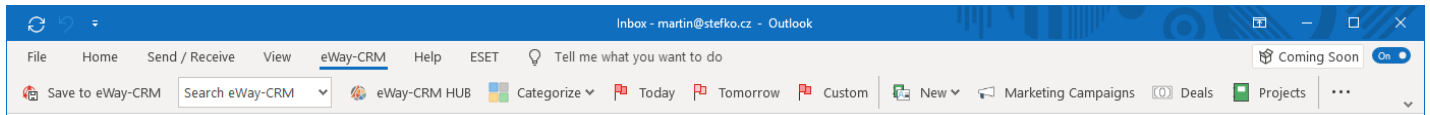
Availability: Simplified ribbon is available since eWay-CRM® 5.3.1 when you are using Microsoft Office 2019.

Lists

eWay-CRM® data are listed in the Outlook main area. If you click on any eWay-CRM® module, a grid with the data appears. If you want to return, just click any Outlook module (Emails, Tasks, Calendar).

Items in the eWay-CRM® lists can be sorted, filtered, grouped, or the column-view-adjusted according to your needs. You can save your defined views for later use. You can display only those data you need. For more information, visit the chapter [Main List](#) in our documentation.

eWay-CRM® Basics

This chapter contains a set of steps for each module to teach you basic functions o eWay-CRM®. We recommend you go through little by little because they reflect the typical activities of eWay-CRM® users.

Contacts & Companies
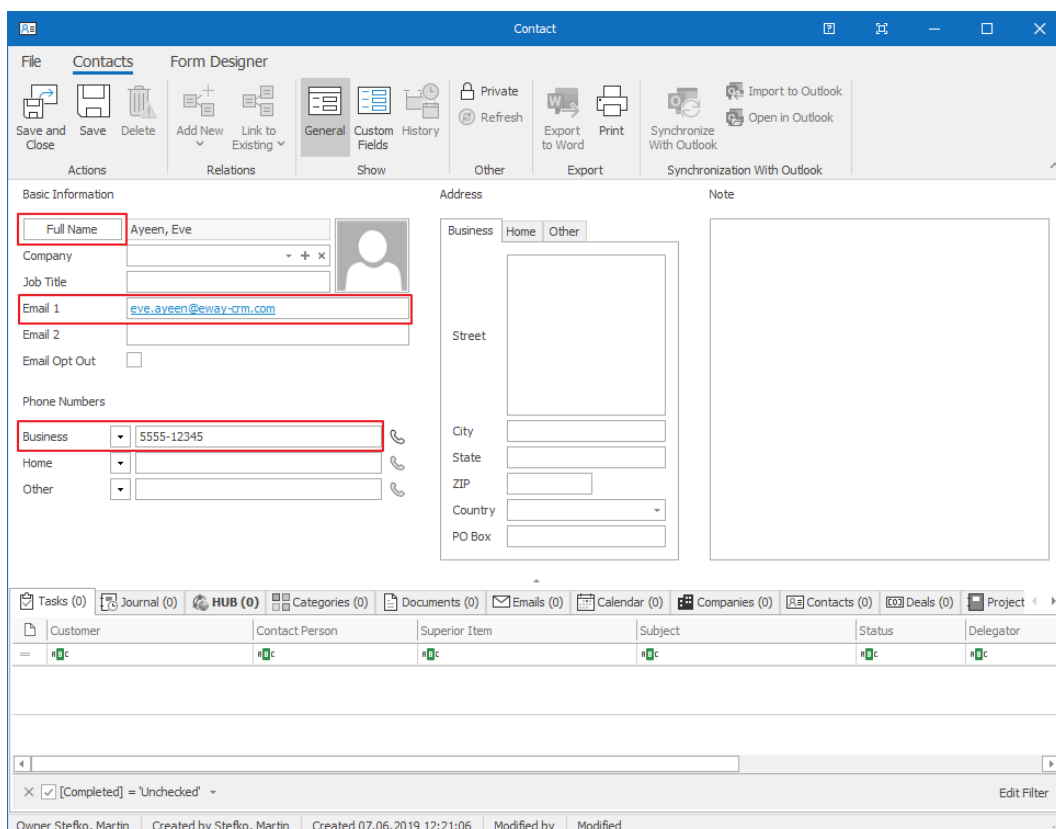
Step 1: Build your customer database

First, you need to build a reliable database of your customers. Or simply import it from Microsoft [Outlook](#) / [Excel](#).

1. Click **New** on the eWay-CRM® ribbon and select **Contact**.
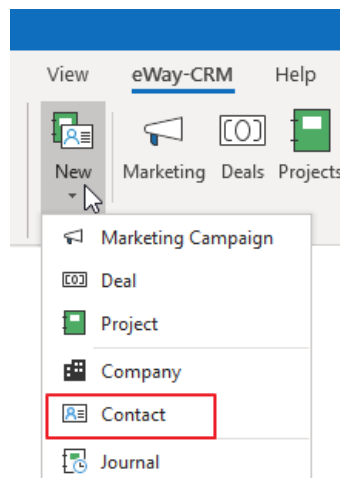
2. Specify details (**Full Name, Email Address, Phone Number**, etc.) and click **Save**.
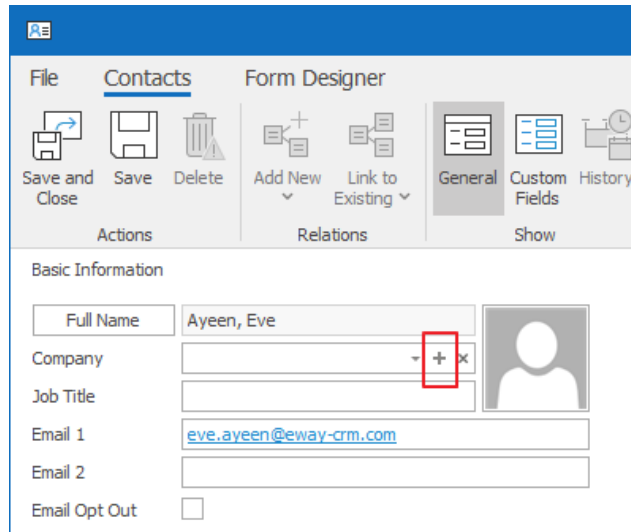
3. To create a company for this contact, click on the **+** sign.

4. Fill in the company details and save and close the record.
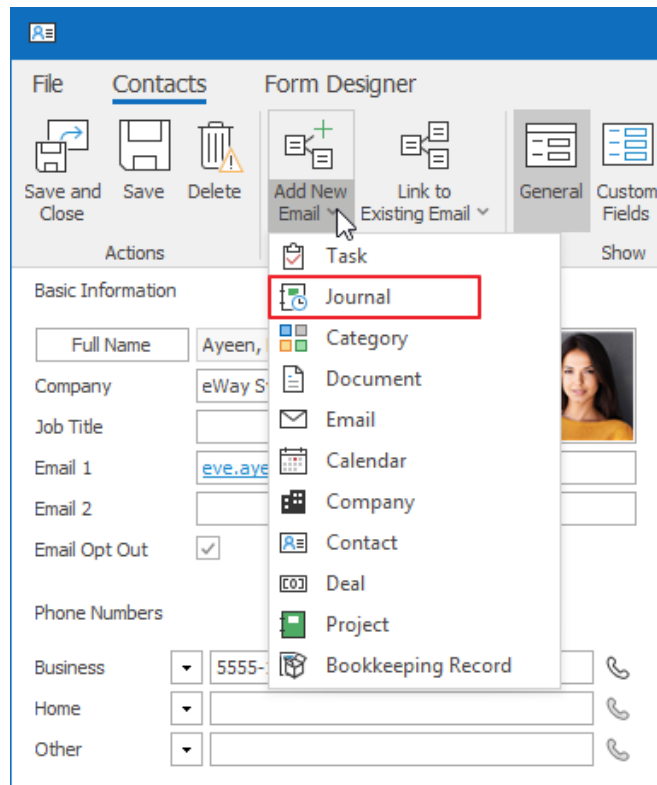
💡 **Tip for you:** Have a look at how to import data from [Microsoft Outlook](#) and [Microsoft Excel](#).

💡 **Tip for eWay-CRM® Premium:** Have a look at eWay-CRM® Mobile and eWay-CRM® Web. The new contact and company are already there.

Step 2: Start writing call/meeting minutes
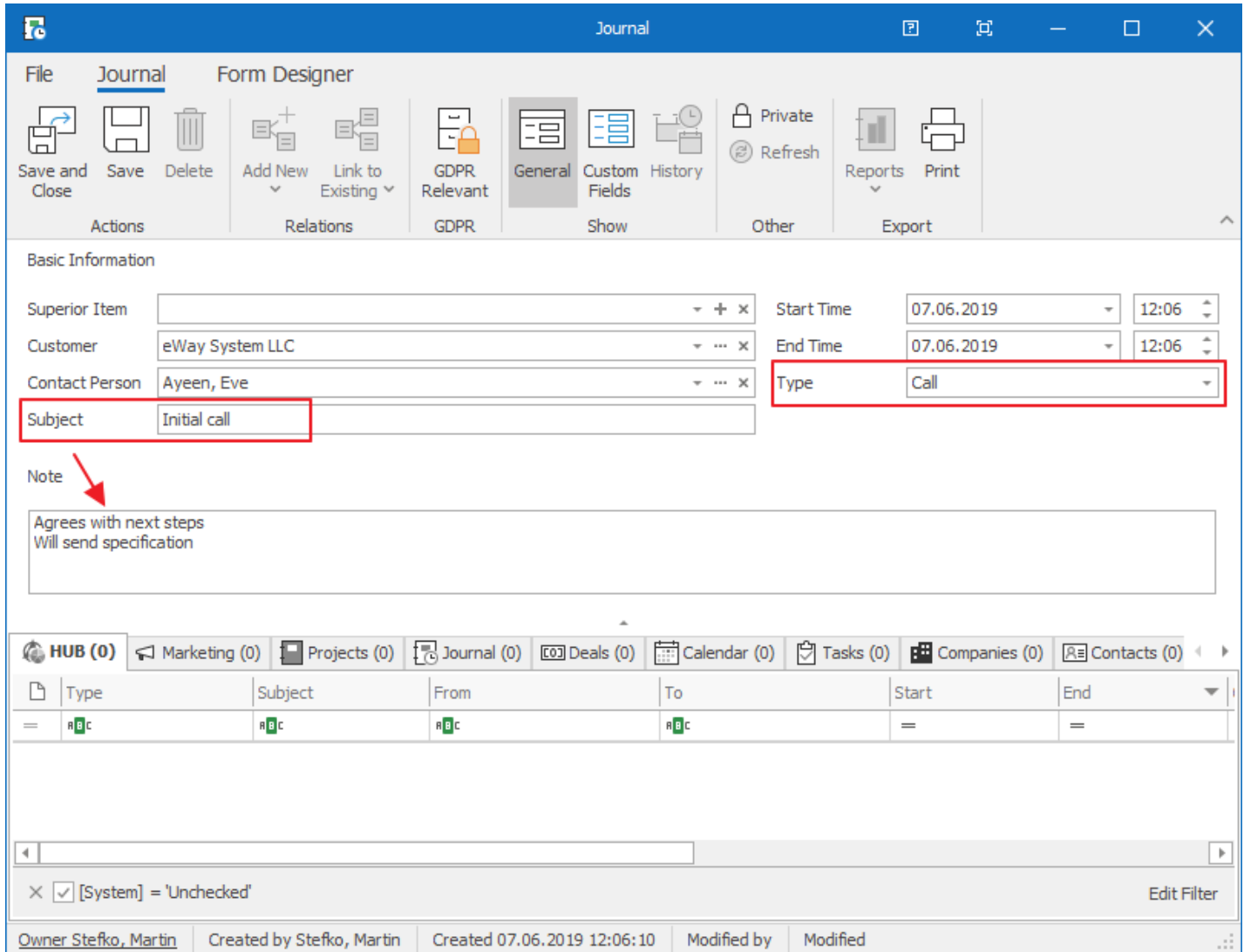
As you pick up the phone or go to a meeting, take notes and write down anything important.

1. On the contact dialog, click **Add New** and choose **Journal**.

2. The **Subject** contains just a short title. Your details go to the **Note**. Don't forget to select the **Type** – i.e. Call or a Meeting. Click **Save**.

3. Now, you can find all your activities under the **Journal** tab in the contact dialog.

💡 **Tip for eWay-CRM® Premium:** You can make a journal in eWay-CRM® Mobile too. To find out more, please visit this link.
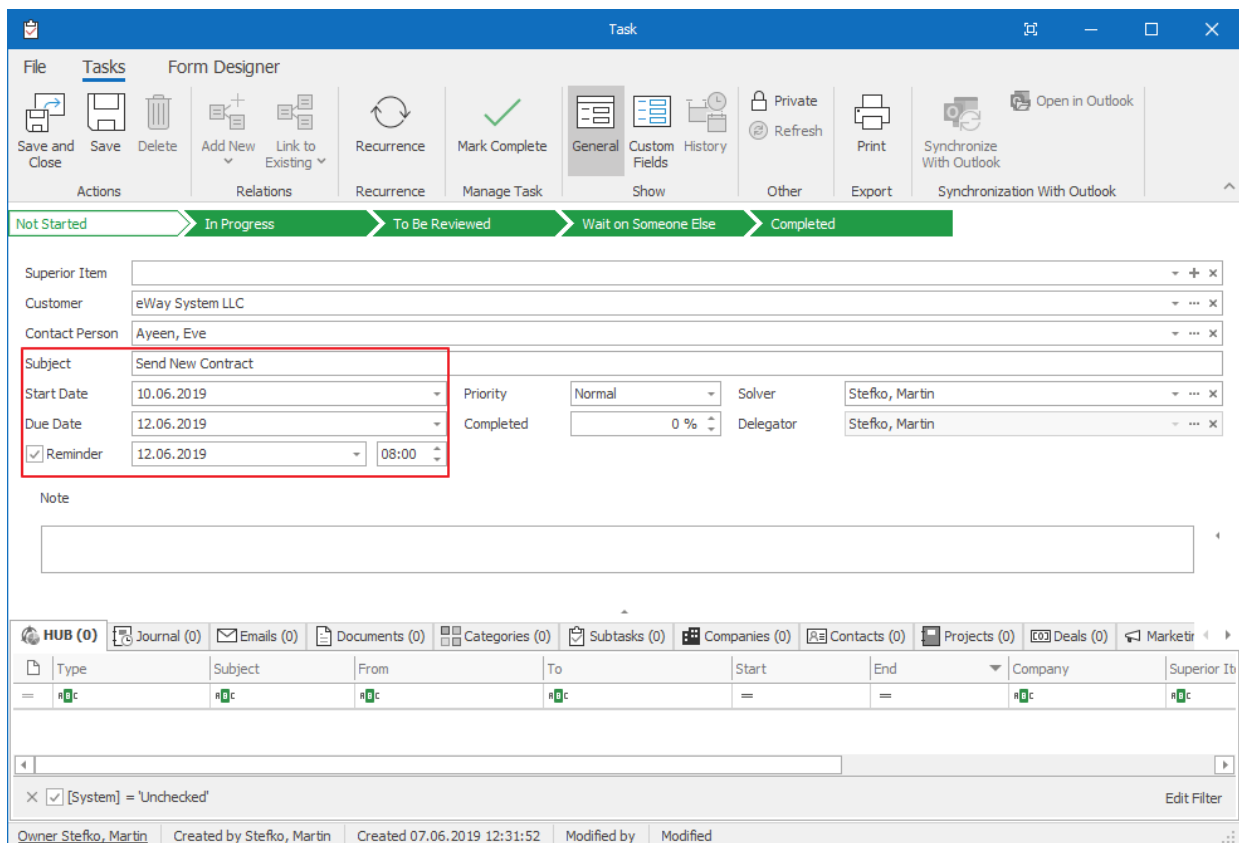
Step 3: Schedule follow-ups

Almost every meeting or a phone call results in a follow-up task. Keep your agenda in order, and you will always know what to do next.

1. You can create a follow-up task from the contact or the journal entry. Let's pretend we are still in the middle of the previous phone call, so the journal record is still in front of us. Click **Add New** and choose **Task**.
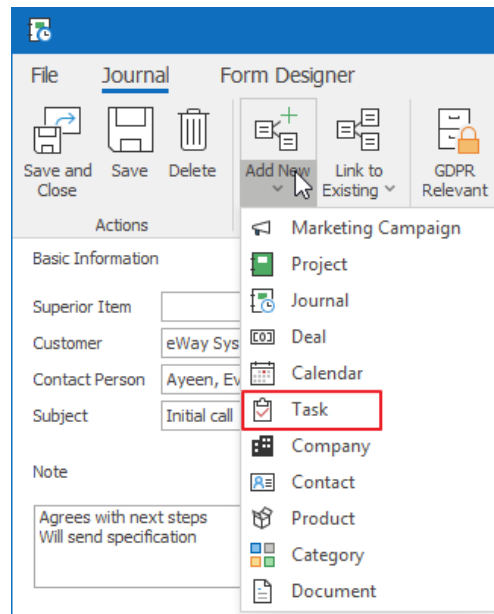
2. A task window will pop up. Specify **Subject**, **Start Date, Due Date, Status, Priority**. Set up the **Reminder** if needed. Click **Save and Close**.

3. As a result, the task will appear in various places. It will be visible in both – the journal entry and the contact dialog. Also, you will find it in the Tasks list.
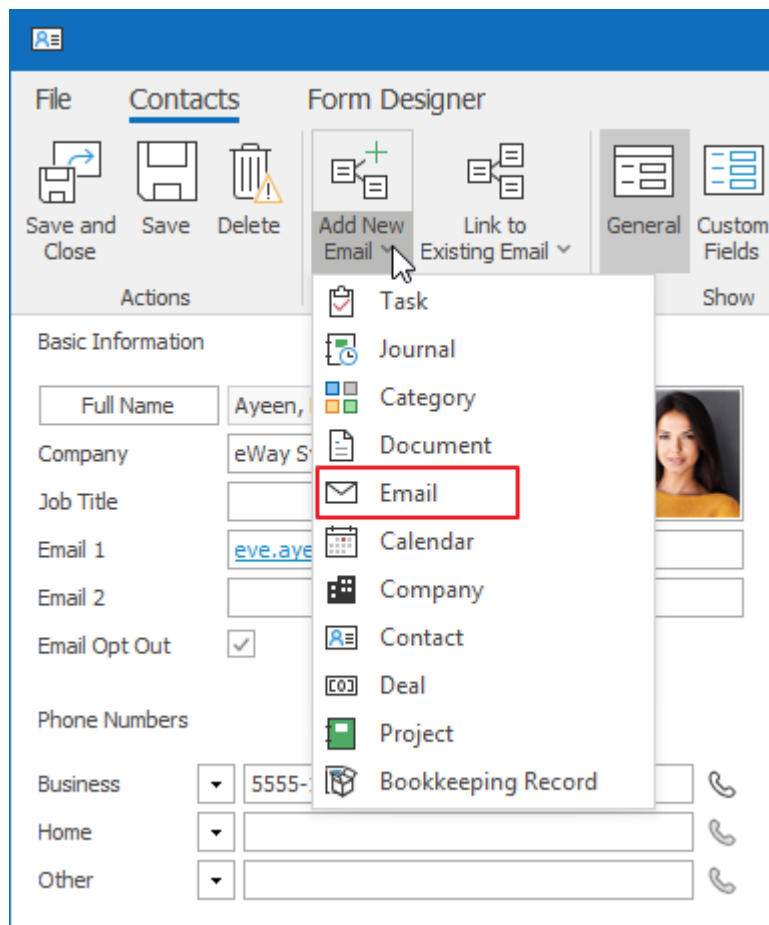
💡 **Tip for you:** Apply the same approach without the Journal and click the **Add New Task** button on the contact dialog. It works the same way.

Step 4: Attach all important emails
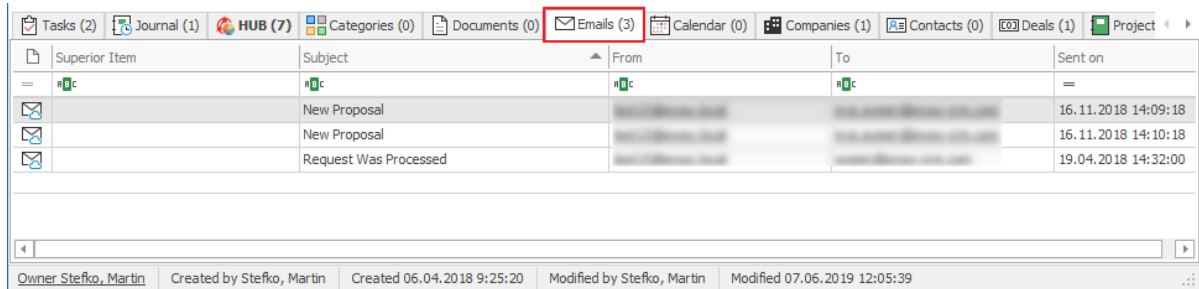
Organized emails in eWay-CRM® will help you keep track of your conversations. Do not lose touch with your customers and deals.

1. On the contact page, click **Add New** and choose **Email**.

2. The email will be linked to the contact automatically and will appear under the **Emails** tab.

💡 **Tip for you:** To link emails sent from Microsoft Outlook to eWay-CRM® contacts, please have a look here:

How to Link Emails to Contacts Manually

How to Link Emails to Contacts Automatically

💡 **Tip for eWay-CRM® Premium:** Have a look at your mobile app and find the contact there. You will see all the information in the HUB. This way, you can access your eWay-CRM® data from your pocket.

Sales
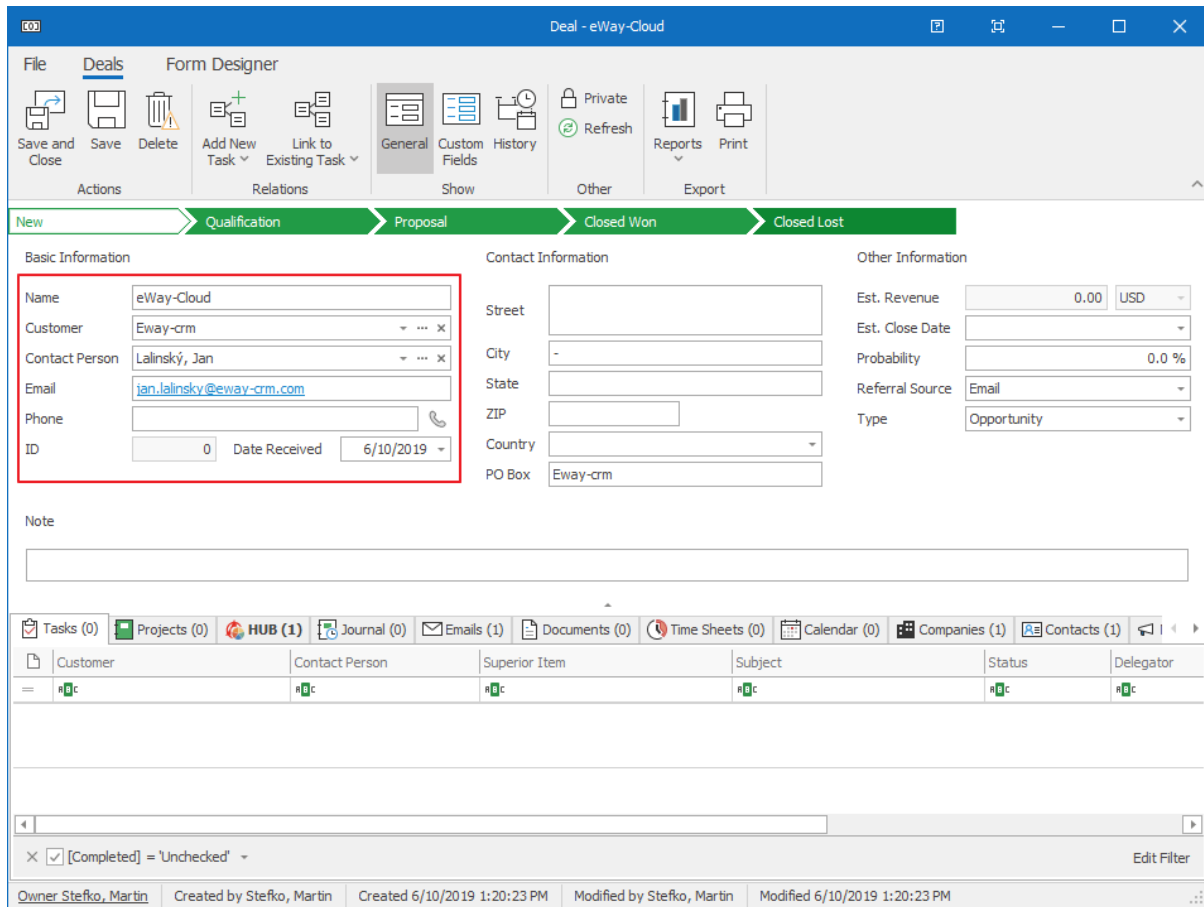
Step 1: Track Business Opportunities

Creating a new deal is similar to creating a new contact. We have already learned that yesterday. Imagine that you have received a promising email asking for more information or a call.

1. Right-click the email in your mailbox and select **Convert to Deal** in the context menu.
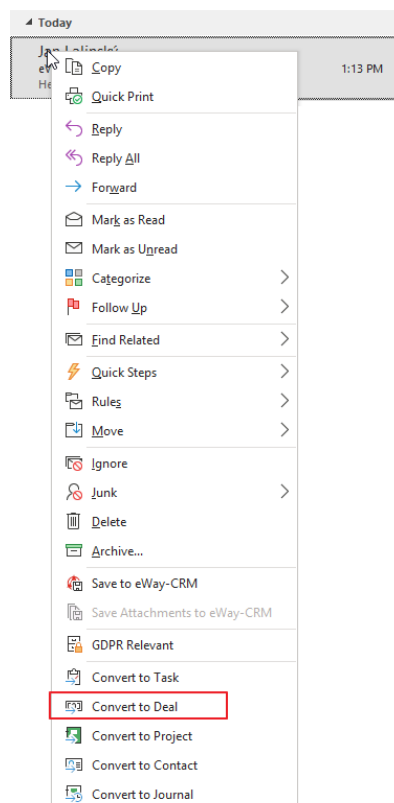
2. A new deal card will be created with pre-filled data from the email. The email will be attached to the new deal automatically.

3. Correct or fill in missing fields and click **Save**.

Tip for you: You can also create a deal manually with the **New button** in the ribbon. Learn more at [How to Create Deals Manually](#).
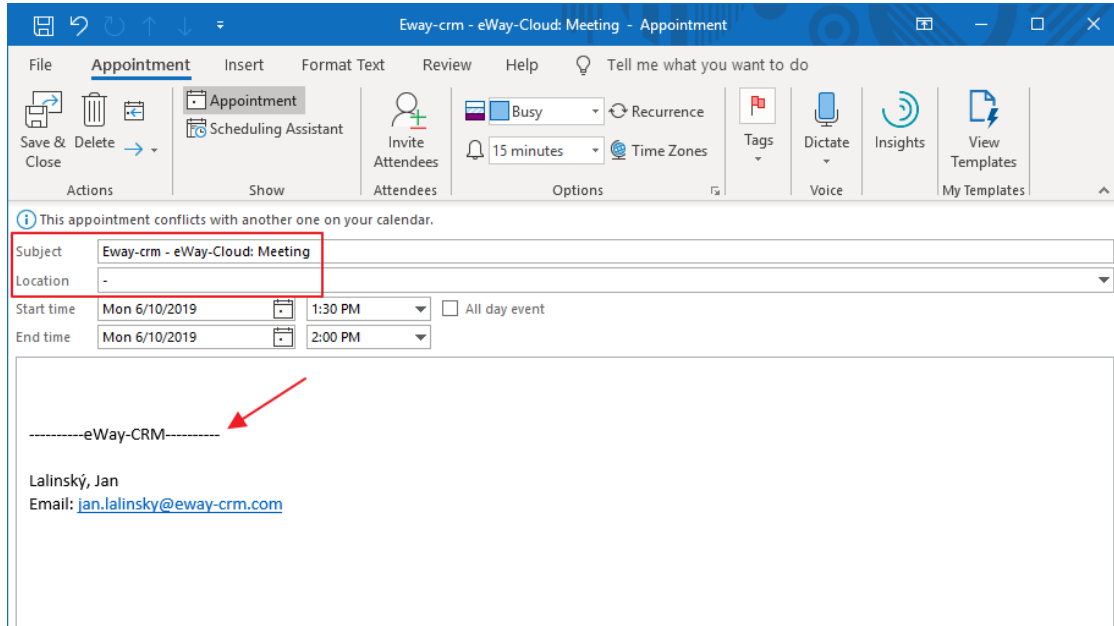
Step 2: Schedule Meeting

You've agreed on a meeting or a conference call. Let's set it up in your calendar.

1. Click **Add New** and choose **Calendar**.
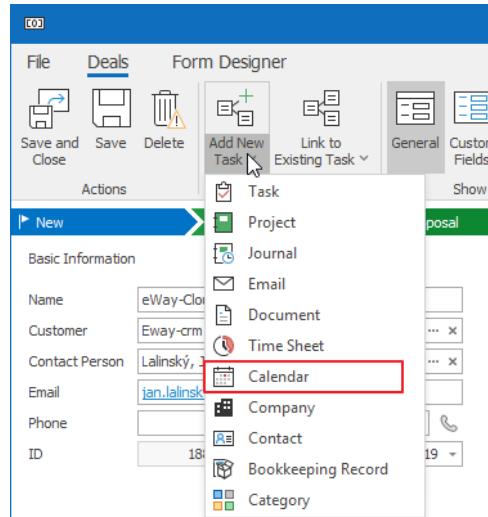
2. A new calendar event will pop up with some fields prefilled: **Subject**, **Location**, and **Notes**.

3. To invite other people to the event, use the button **Invite Attendees** in the top part of the window. Just make sure that the note does not contain anything you'd like to keep under your roof.
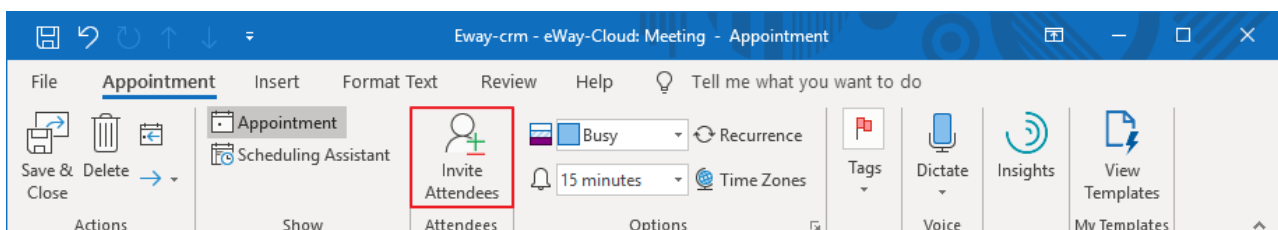
4. Save or Send the meeting. As a result, the event will appear both in your Outlook Calendar and under the **Calendar** tab on the deal.
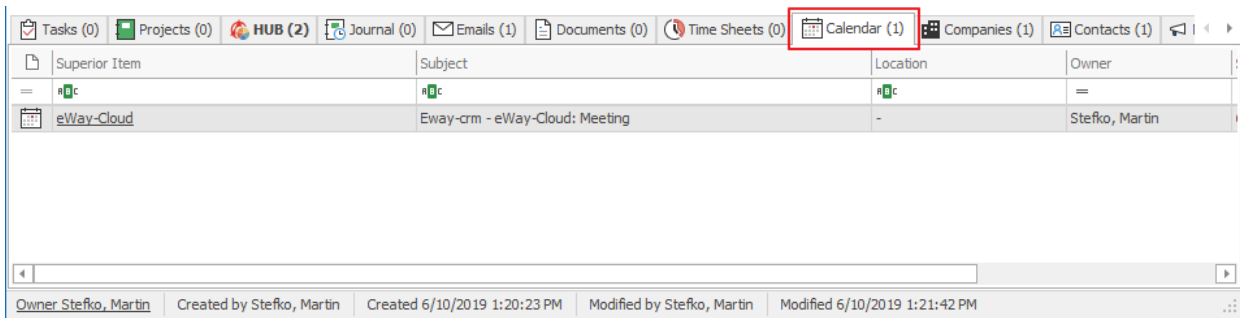
💡 **Tip for you:** Alternatively, you can create a meeting in Outlook calendar
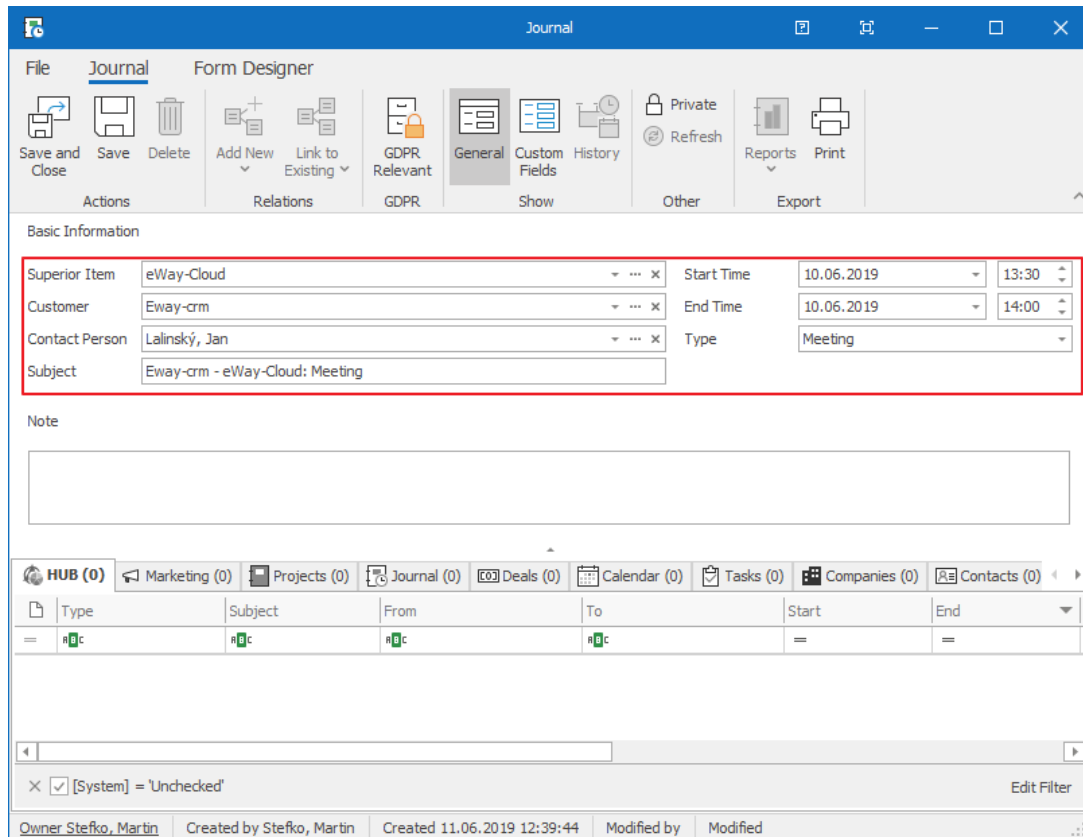
Step 3: Keep Notes from Your Meetings Organized

Yesterday, you learned how to create a new journal and take notes after a phone call. You can do the same during your meetings. If you want to learn something new today, follow these steps.

1. During the meeting or after it, you can right-click on the event in your Outlook calendar and convert it to **Journal**.
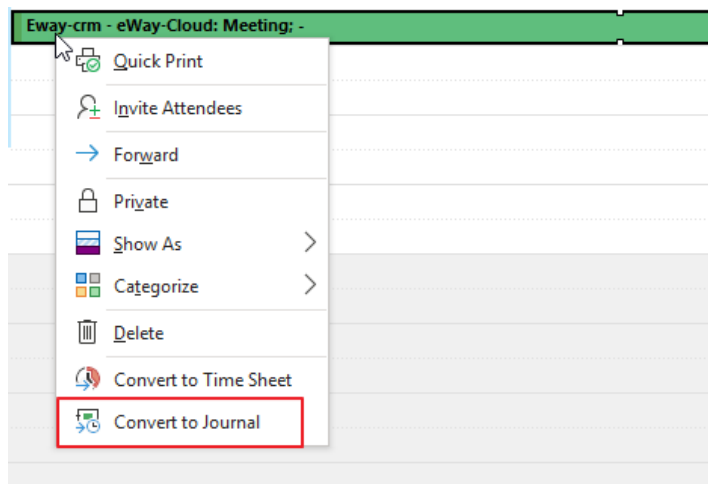
2. A journal item will appear. **Superior Item** will contain the deal. **Start Time** and **End Time** will be filled with the calendar start/end. Use the large **Note** field to type down your notes. Do not forget to choose **Meeting** in the **Type**.
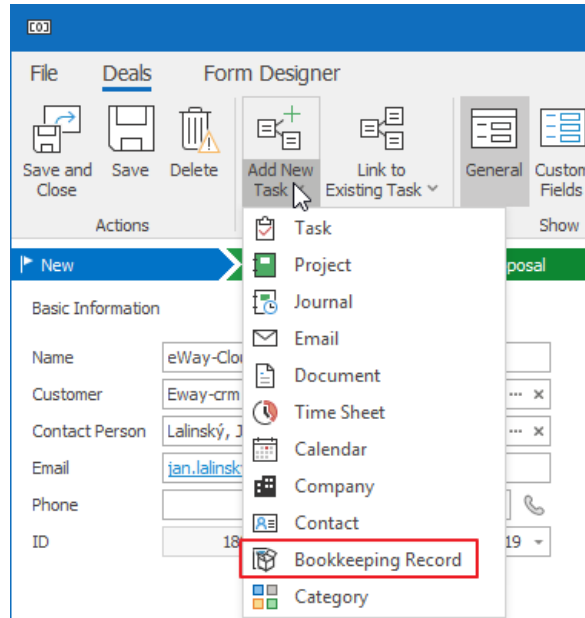

3. Save and close.

💡 **Tip for eWay-CRM® Premium:** You can make a journal in eWay-CRM® Mobile too. To find out more, please visit our how-to article.
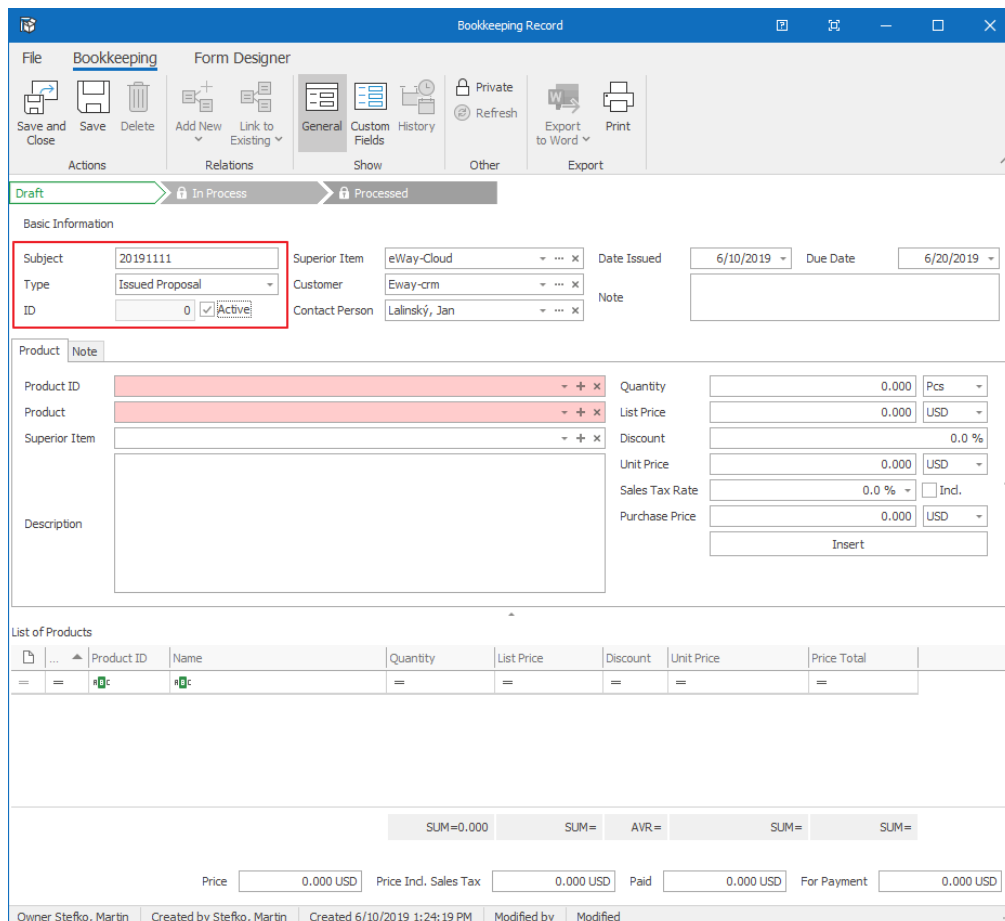
Step 4: Send Proposal by Email

When a customer is ready, it is time for a proposal. Let's use our bookkeeping module to generate it.

1. Click **Add New** and choose **Bookkeeping Record**.

2. Pick a **Subject**, select the type **Issued Proposal**. Click **Active**.

3. Add products/services into the bookkeeping record. You can search them by fields **Product ID** or **Product**. You can change the **Quantity, Unit Price**, or apply a **Discount**. As soon as the proposal is made, save it.


4. Click **Export to Word > Proposal**. A Microsoft Word template will open with predefined data.

5. Click **File > Share > Email > Send as PDF**. A new email will pop up with your quote attached as a PDF. Send the email.
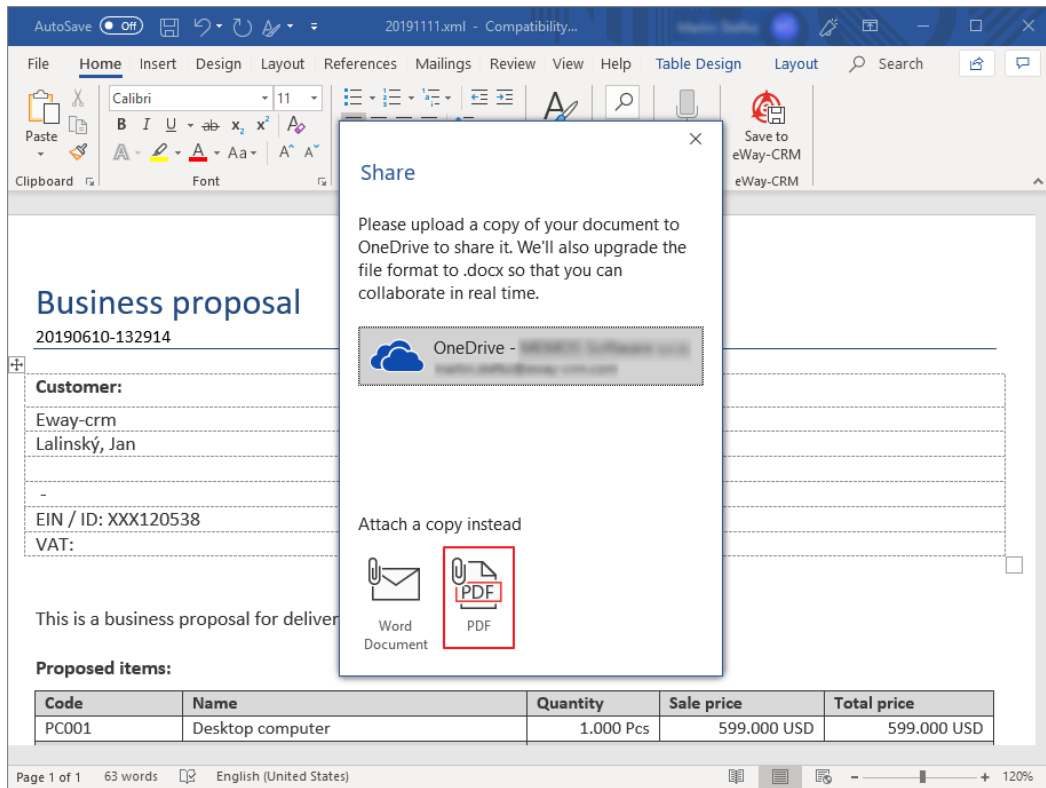
6. If you go back to the deal page, you will find your bookkeeping record in the **HUB** or under the tab **Bookkeeping**. Note, that the deal price changed according to the active proposal.
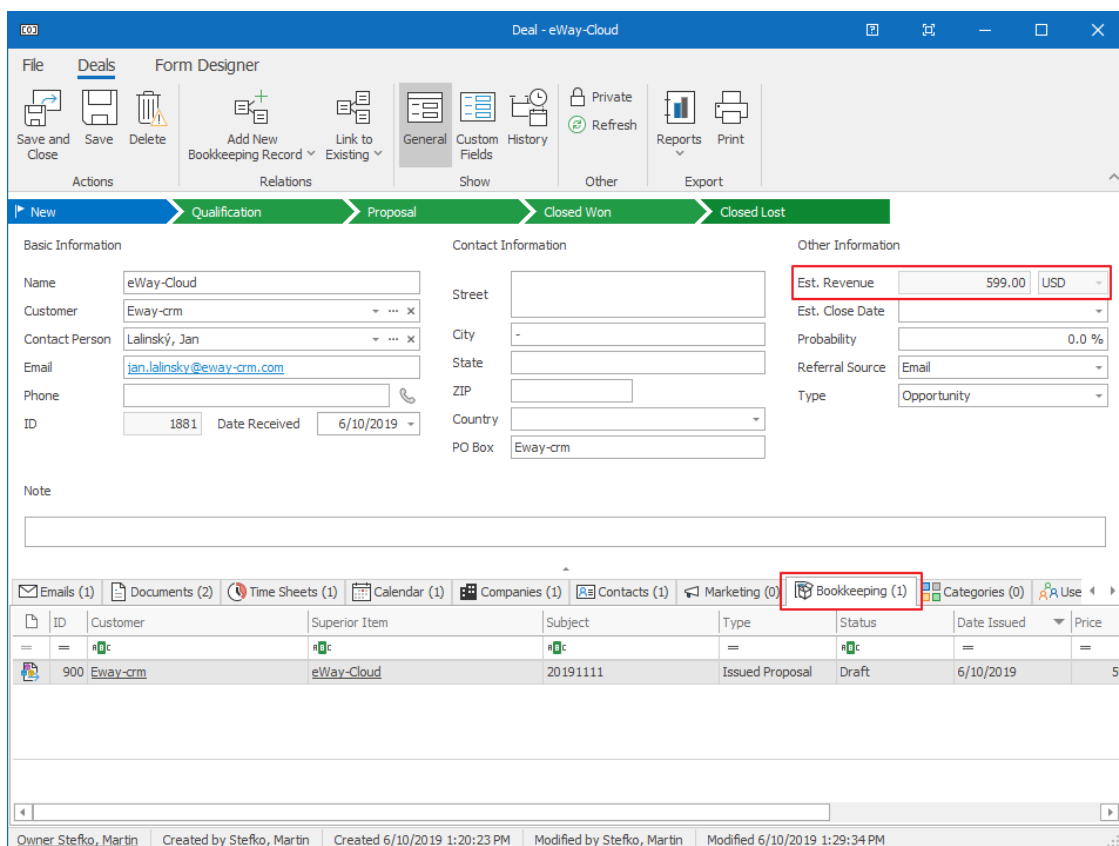
7. Click on the status **Proposal** and **Save and Close** the deal. It will change its status.

💡 **Tip for you:** To link emails sent from Microsoft Outlook into eWay-CRM®, have a look here: How to Link Emails to Deals
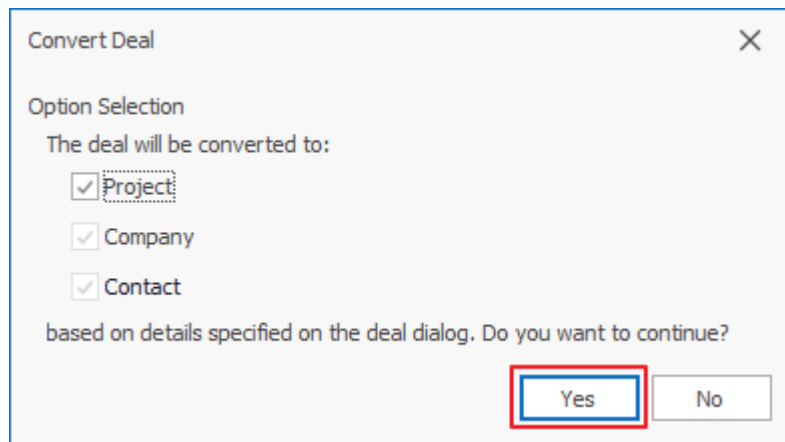
Step 5: Convert Deal into Project

Success! Your proposal was accepted, and the deal is closed. Let's convert it into a project and launch the workflow.

1. Open the deal.

2. Click on **Closed Won** status in the workflow tab.
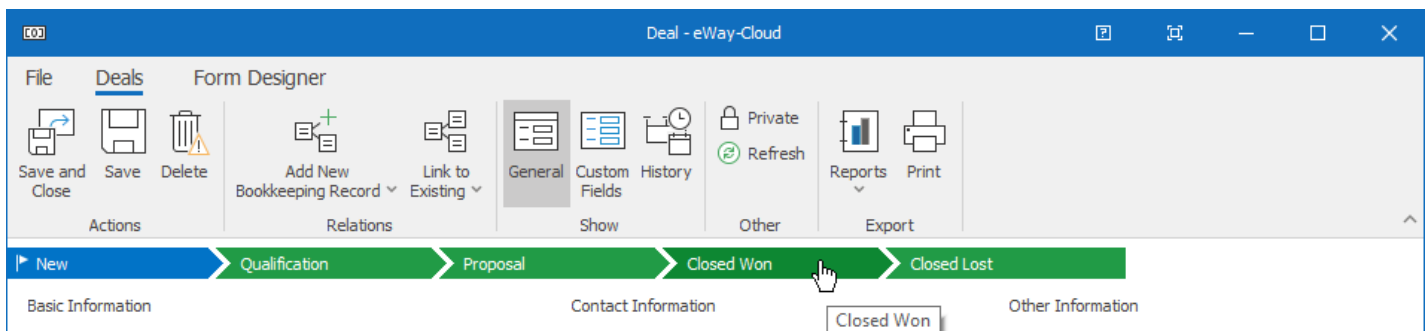
3. A new window will pop-up. Check all appropriate boxes and hit **Yes**.

4. The project with respective contact and company will be created in eWay-CRM®, and it will contain all the communication history of the deal. The deal itself will stay in eWay-CRM® with the status of **Closed Won**.
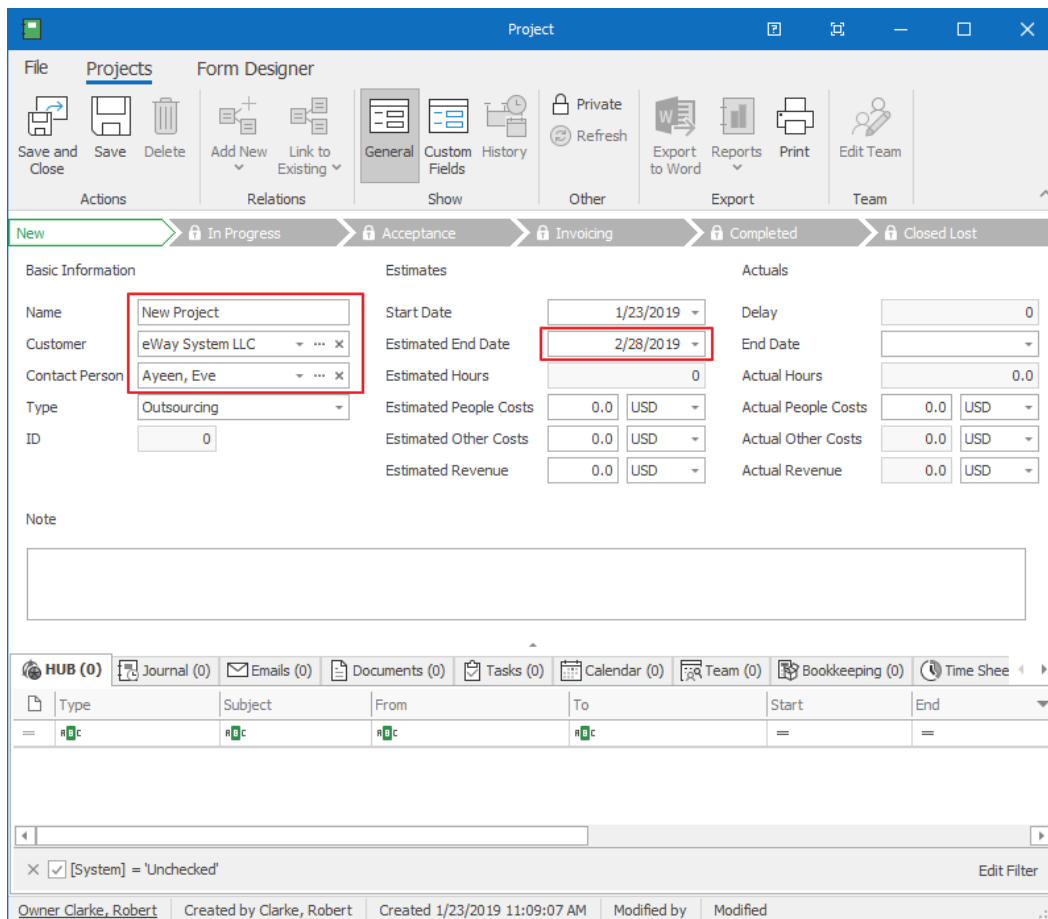
Projects

Step 1: Create a Project

You will never get lost in projects as long as you keep them in eWay-CRM®. Set the project up, choose your team, and plan a budget.
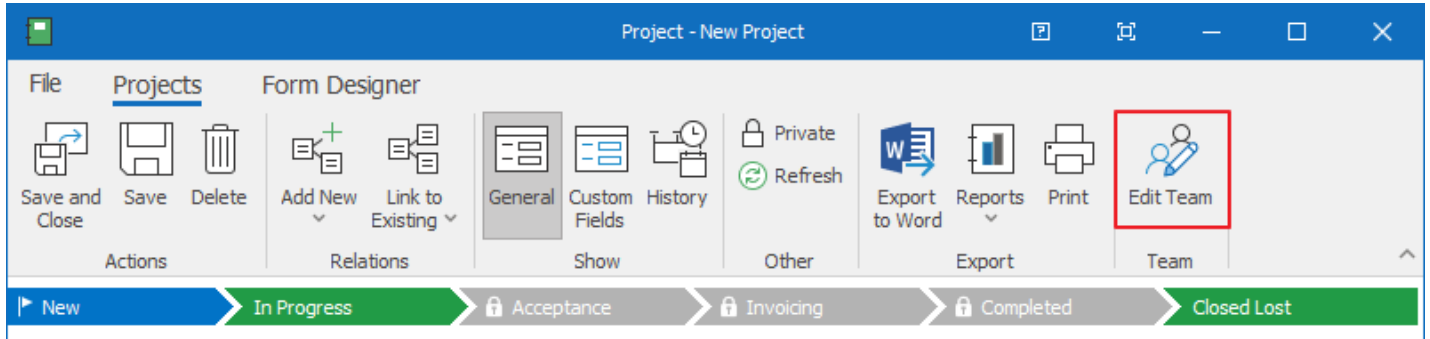
1. Click **New > Project** in the eWay-CRM® ribbon.
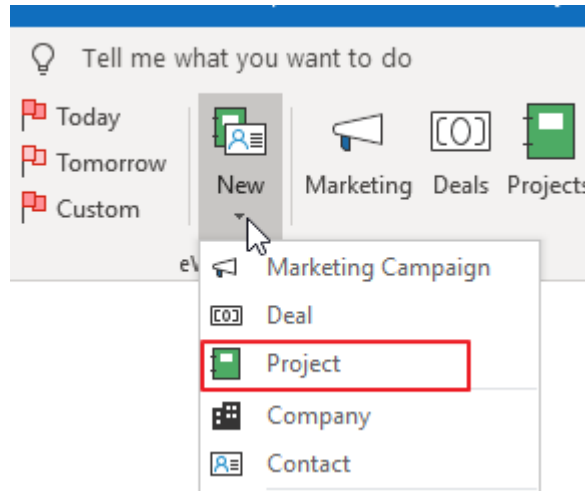
2. Fill in all the necessary information. We strongly recommend entering **Customer, Contact Person, Name,** and **Estimated End**.
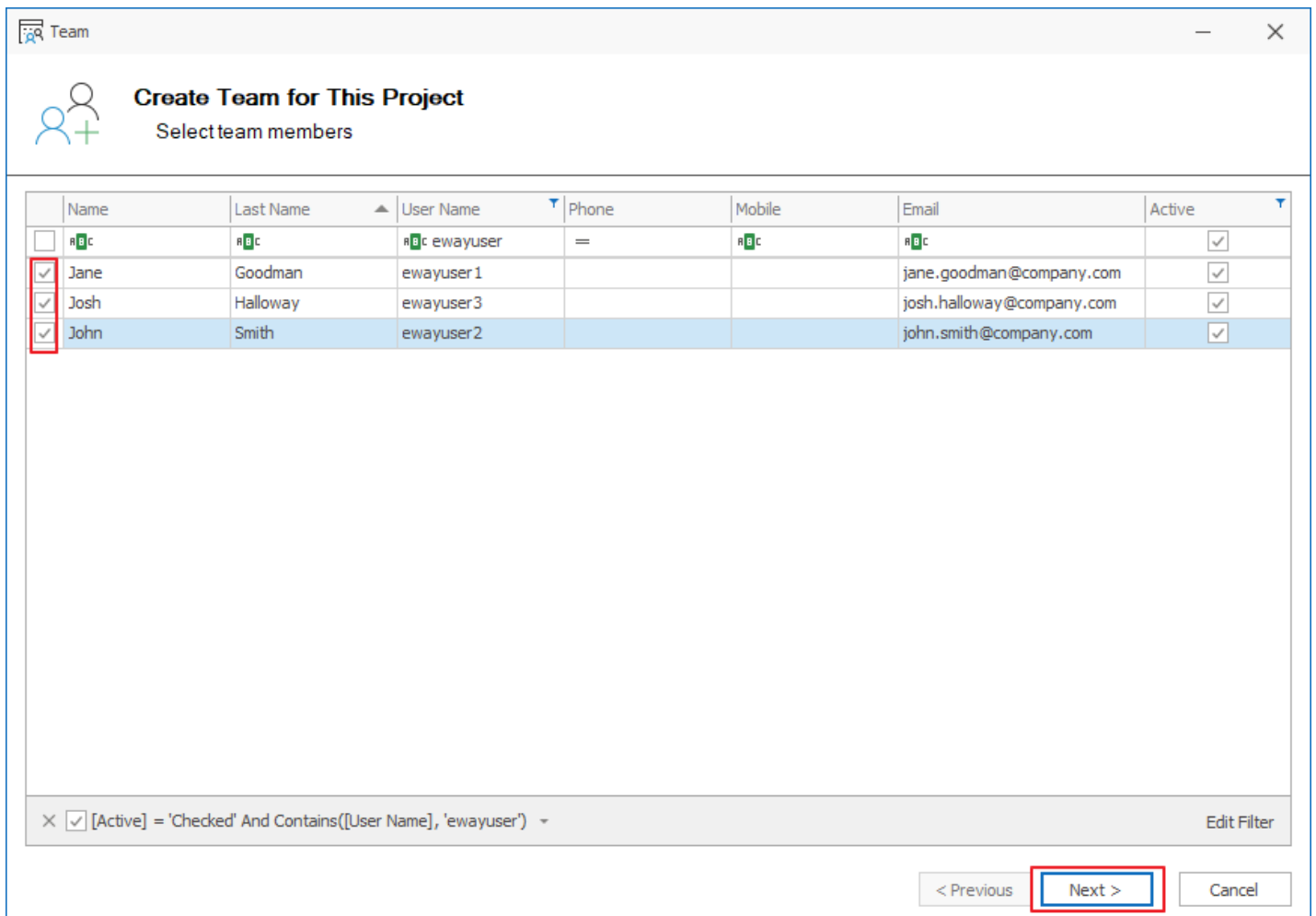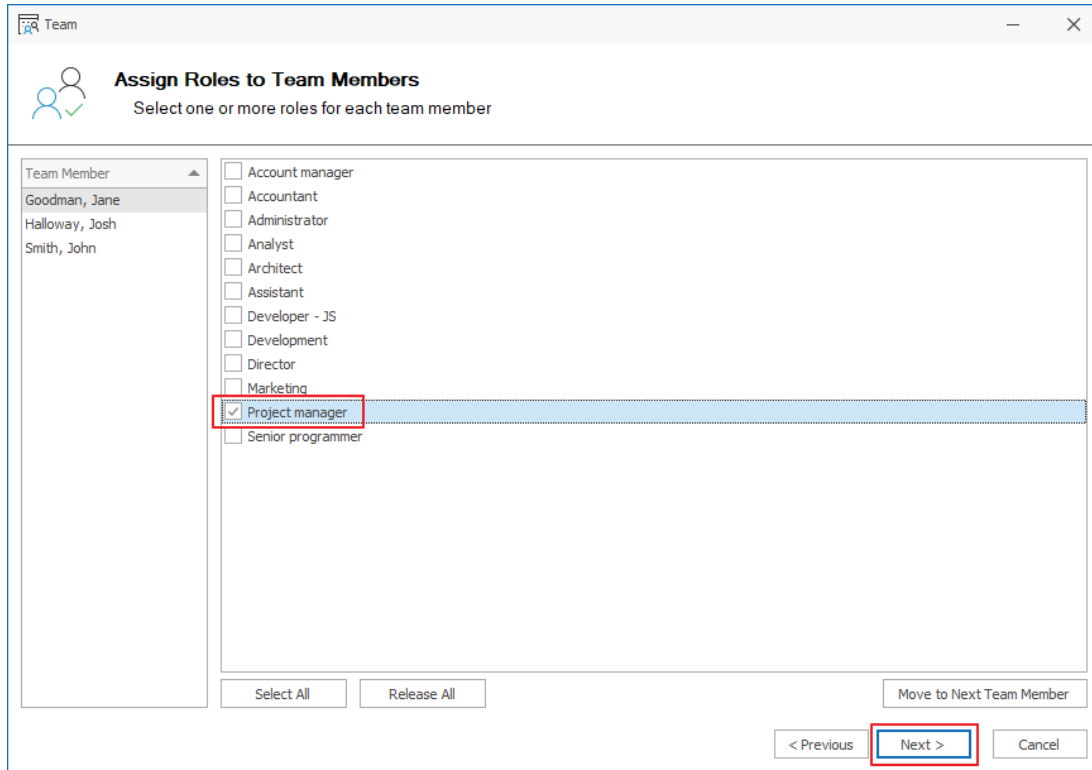
3. Save the record.

4. If you want to add other team members to the project team, click **Edit Team**.

5. Choose your colleagues and click **Next**.

6. In the following screen, you can assign their roles. You don't need to mark everybody. Just make sure you chose a Project Manager – the one who is responsible for the job. Confirm by **OK**.
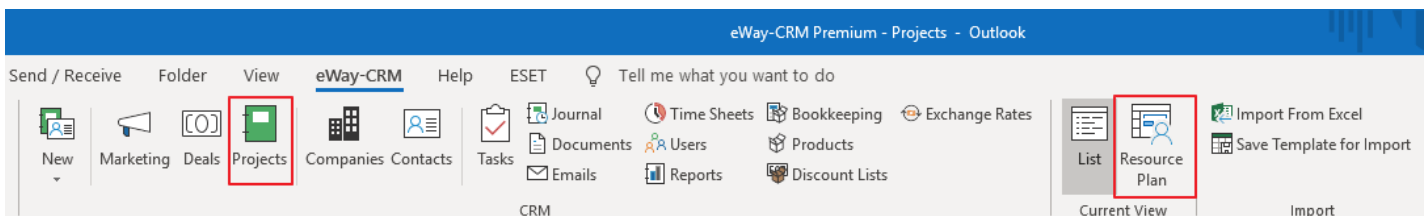

💡 **Tips for you:**

If you work with module Deals as well, a new project is automatically created right as you convert a deal into a project.
If you have received an email from your customer, you can convert it to a project right away. Just follow the steps at How to Create Projects from Emails page.

Step 2: Plan Human Resources

To make sure that your team has enough capacity for the project, check your team members' availability, and plan accordingly.

1. Go back to the list of projects. In the eWay-CRM® ribbon, click **Resource Plan**.

2.   You will see a list of your projects along with the team members assigned to each of them. You will also find a list of calendar weeks in the following columns.

	Name	Customer	Team	Week 4, 2019 Jan 21 - Jan 27	Week 5, 2019 Jan 28 - Feb 3	Week 6, 2019 Feb 4 - Feb 10	Week 7, 2019 Feb 11 - Feb 17	Week 8, 2019 Feb 18 - Feb 24
=	ᴀʙᴄ new project	ᴀʙᴄ	ᴀʙᴄ	=	=	=	=	=
	New project		Stefko, Martin					
	New Project	eWay System LLC	Halloway, Josh					
	New Project	eWay System LLC	Goodman, Jane					
			Halloway, Josh					
			Smith, John					
	New Project	eWay System LLC	Lee, Stan					
			Smart, Evelyn					
			Stone, Claire					

3.   Click into each cell and type down how many hours you'd like to allocate each team member to the specific project in the selected week. Don't worry when values change to red. It means that the person is overloaded. In the next tutorial, you will learn, how to add the employees' availability.

	Name	Customer	Team	Week 4, 2019 Jan 21 - Jan 27	Week 5, 2019 Jan 28 - Feb 3	Week 6, 2019 Feb 4 - Feb 10	Week 7, 2019 Feb 11 - Feb 17	Week 8, 2019 Feb 18 - Feb 24
=	ᴀʙᴄ new project	ᴀʙᴄ	ᴀʙᴄ	=	=	=	=	=
	New project		Stefko, Martin					
	New Project	eWay System LLC	Halloway, Josh					
	New Project	eWay System LLC	Goodman, Jane	10.00	10.00	10.00	10.00	10.00
			Halloway, Josh	20.00	20.00	20.00	20.00	20.00
			Smith, John	5.00	5.00	5.00	5.00	5.00
	New Project	eWay System LLC	Lee, Stan					
			Smart, Evelyn					
			Stone, Claire					

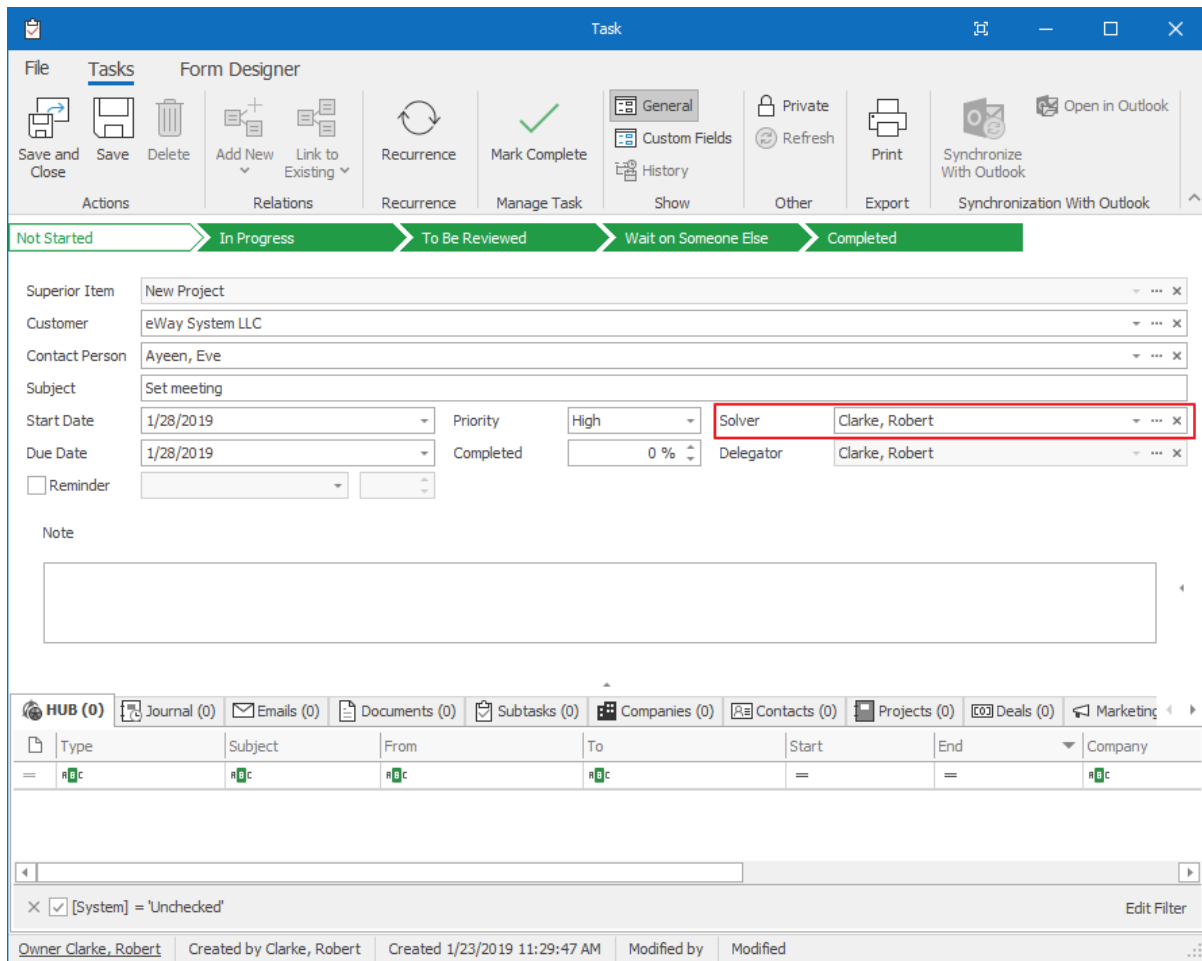4.   You can copy-paste the values to speed up the process.

Step 3: Create and Assign Tasks

Use tasks to establish deadlines and keep your projects up to date. You can review all the tasks assigned to a particular project at any time in both eWay-CRM® and Microsoft Outlook TODO list.

1.   Click **Add New** and choose **Task**.
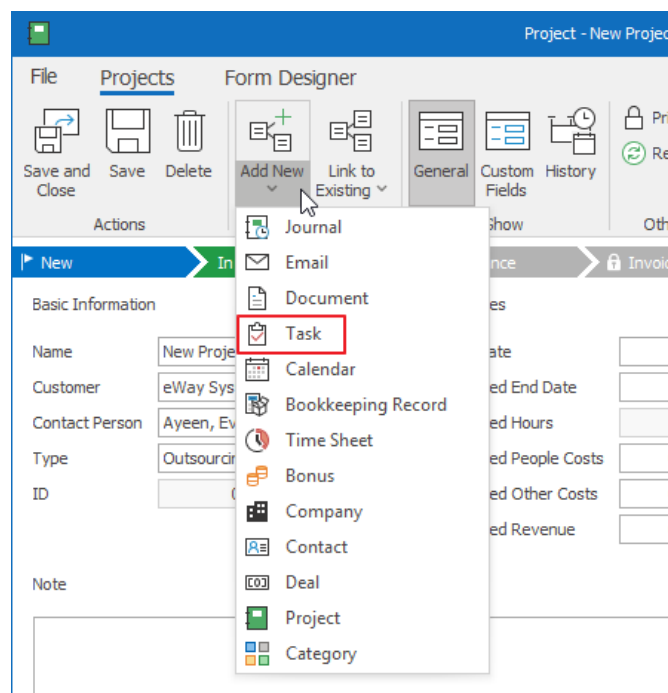
2. If you want to assign a task to somebody else, click the **Solver** field and select a new user. Save the task.
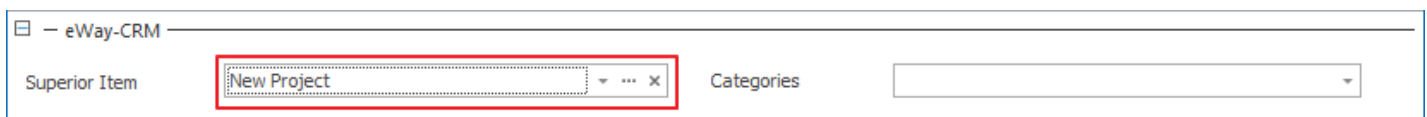

💡 **Tip for you:** Sooner or later you will need to add tasks to an existing project. You can create a task right in Microsoft Outlook and link it with the eWay-CRM® project. Find out how to do it.

Step 4: Track Your Communication History

In most projects, customers specify their needs and provide feedback. Write down important notes and attach emails to keep everything in one place.

Attaching Emails

1. You've already learned how to send an email from the contact cart. Let's have a look at how to attach an incoming email to a project manually.

2. Open the email in Outlook.

3. In the bottom section, you will find a field **Superior Item**. Select a project. That's it.

4. You can click on three dots to open the project. The email will be available under tabs **HUB** and **Emails**.
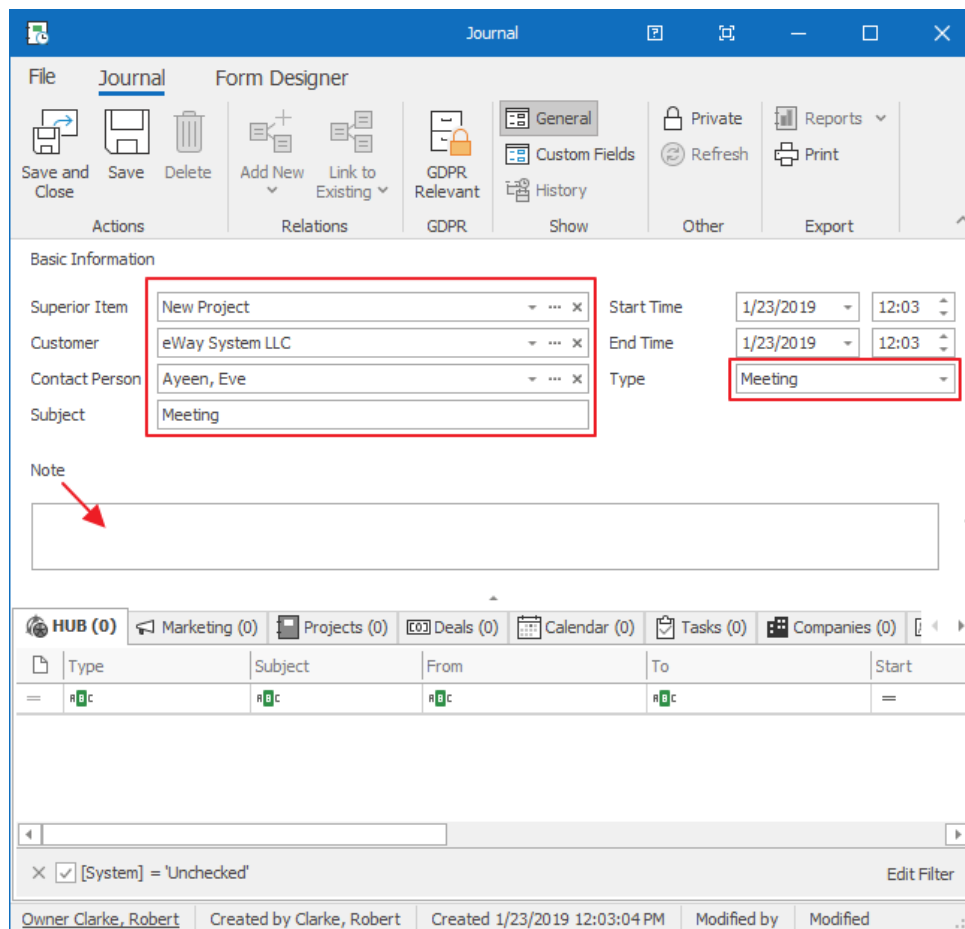
💡**Tip for you:** To diligently save outgoing emails into eWay-CRM®, follow this article.

Taking Notes

1. Click **New > Journal** in the eWay-CRM® ribbon.
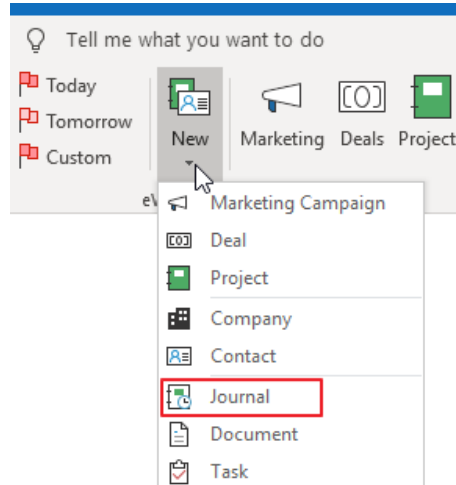
2. Fill in the **Subject** and **Type**. Write down details of the call/meeting into the **Note**. Choose a project in the **Superior Item**.
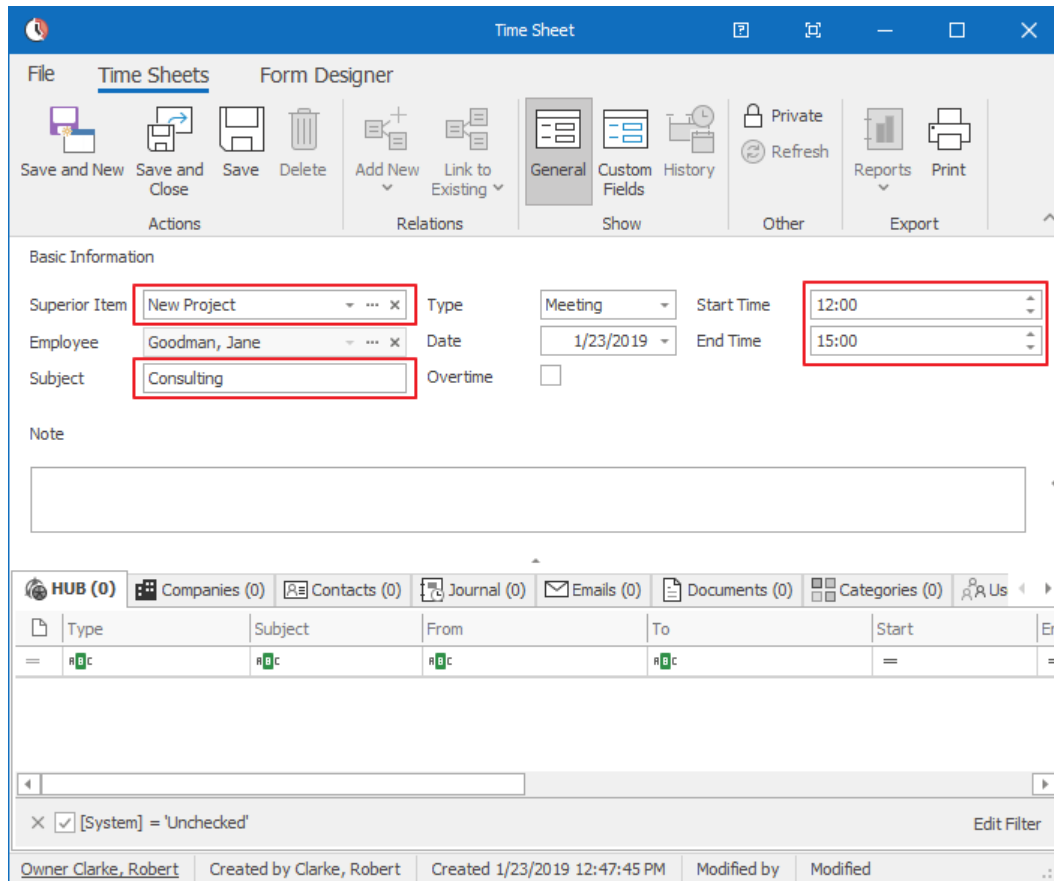

3. Save and close the journal.

Tip for eWay-CRM® Premium: You can create a journal in eWay-CRM® Mobile too. To find out more, please visit this link.
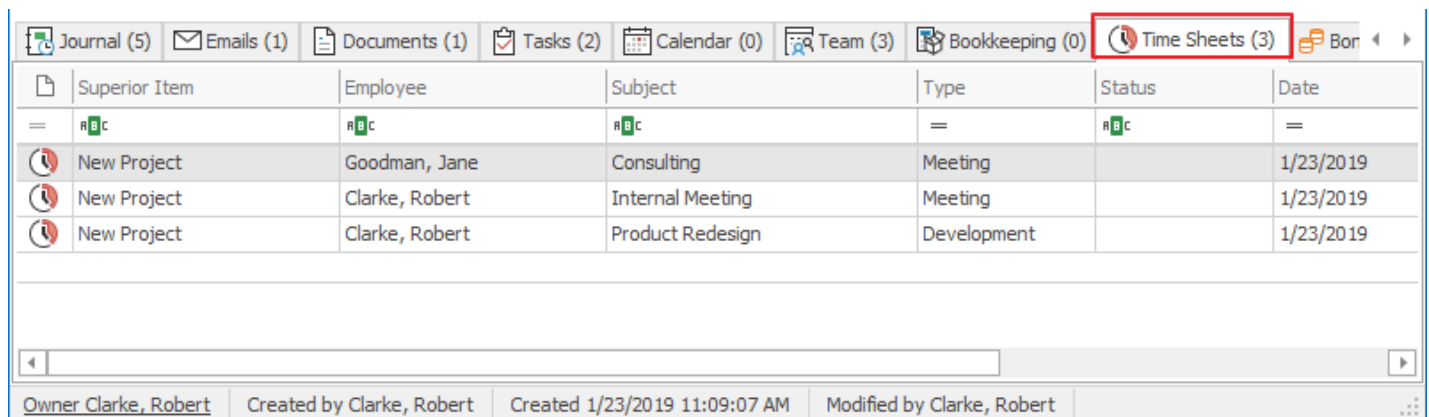
Step 5: Use Timesheets

Timesheets can help you understand how much time people spend on particular projects. Use them to plan better and keep budgets under control.

1. To fill in your daily timesheet, click **New > Time Sheet** in the eWay-CRM® ribbon.

2. Choose a **Project**, fill in the **Subject, Start**, and **End**. Optionally, you can change the type and enter a brief description to the note.

3. If you click **Save and New**, eWay-CRM® will pop up with a new timesheet so that you can report another activity.

4. In the end, you will find the summarized timesheets under the tab **Timesheets** of the particular project.
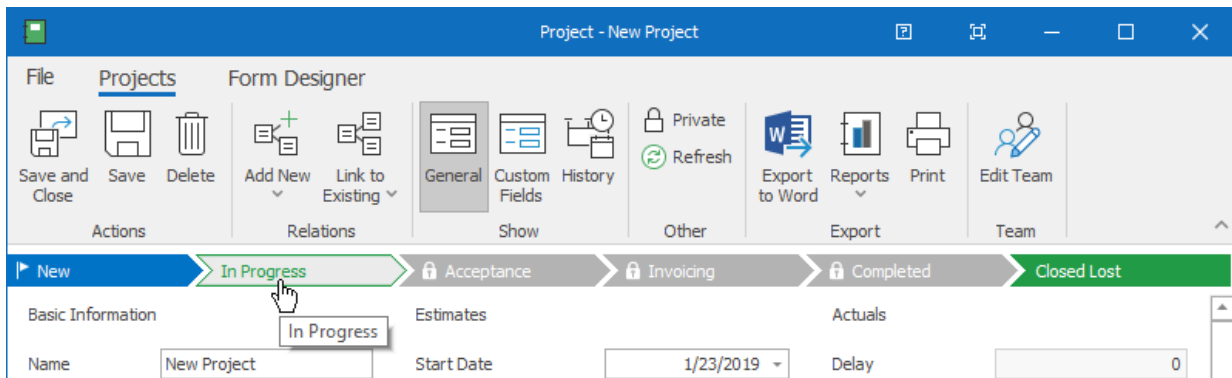
Tip for you: Together with the module Salaries, eWay-CRM® can automatically calculate project people's costs and keep the project profit up to date. Find out more here.

Step 6: Update the Project Status

As the delivery continues, you need to change the project status. Keeping order in your projects will help you get the total overview.

1. Open a project.

2. Click on the green status. It will turn white to signalize you where you want to move the project to.

3. Save and close.

4. Use the project list to see all jobs and their stages.
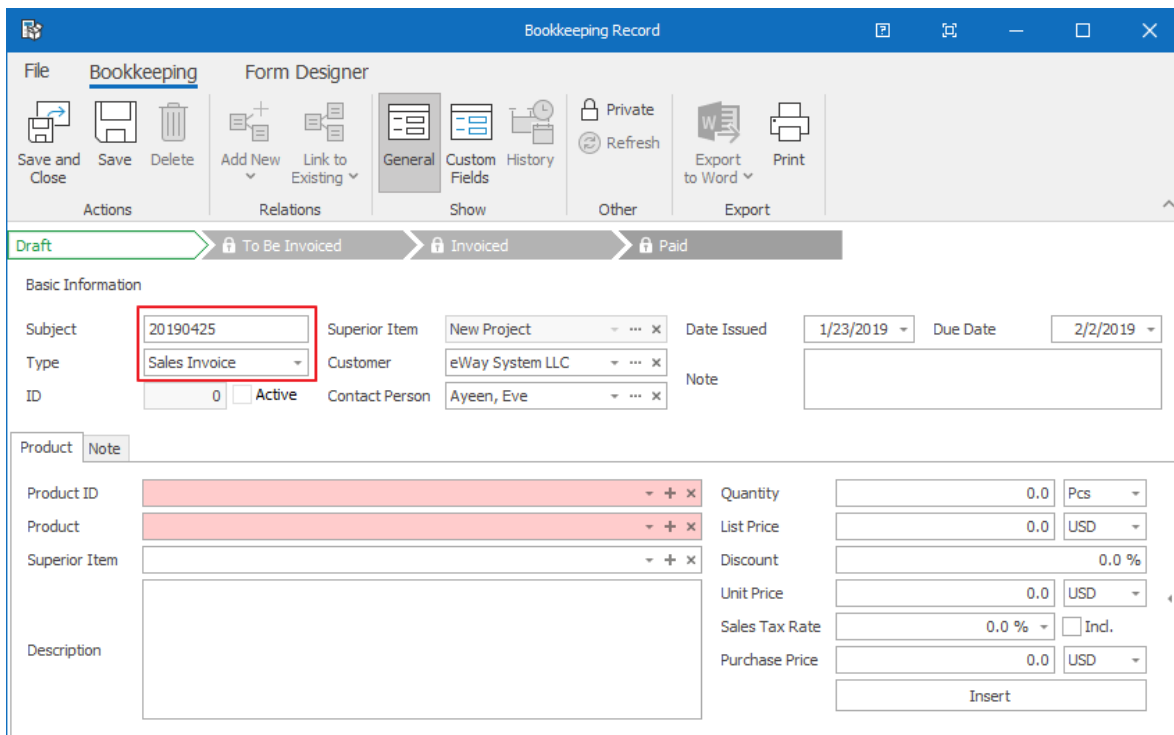
Step 7: Issue an Invoice

Create invoices in eWay-CRM® and link them to the corresponding projects.

1. Open a project.

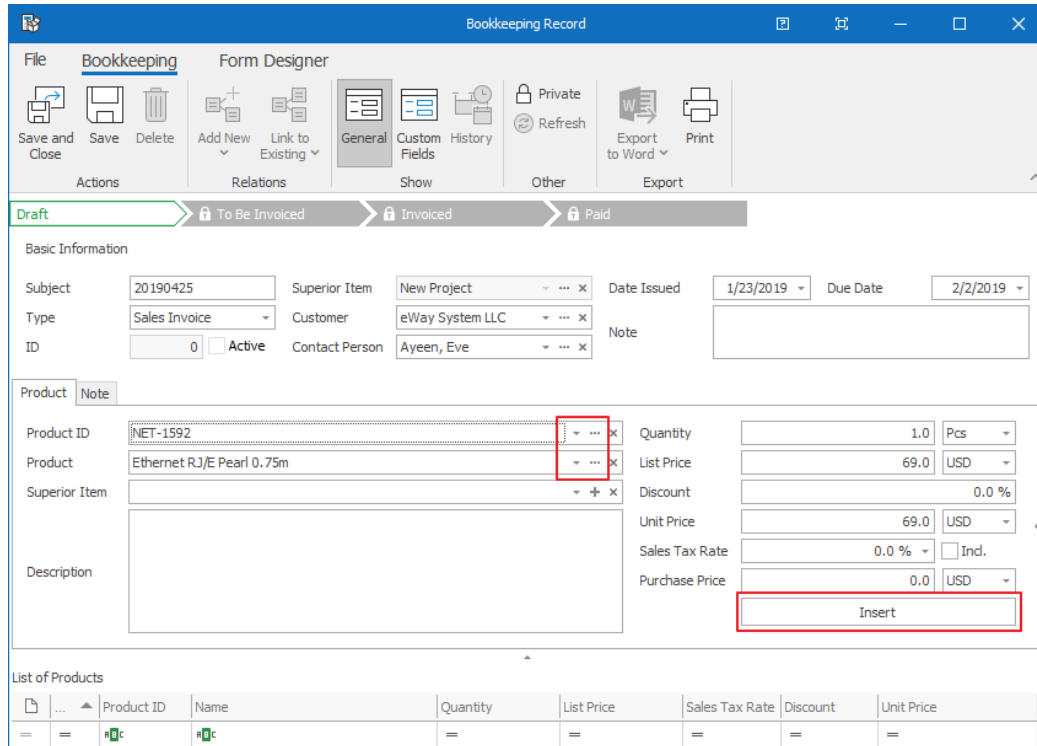2. Click **Add New** and choose **Bookkeeping Record**.
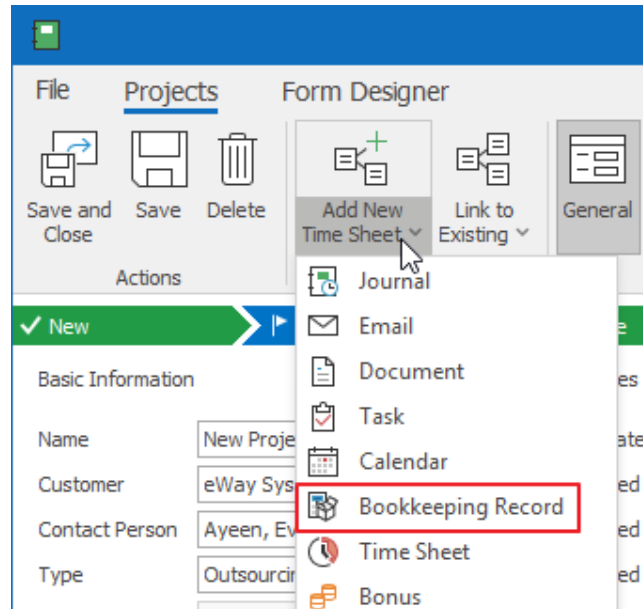
3. Change the type to **Sales Invoice** and enter a short description to the **Subject**.

4. Add products/services into the bookkeeping record. Search them by the fields **Product ID** or **Product**. You can also change the **Quantity, Unit price**, or apply a **Discount**. In the end, press **Insert.**

5. As soon as the invoice is done, save it.

6. Click **Export to Word > Invoice** (or Invoice VAT). A Microsoft Word template will open with predefined data. In the new version of Microsoft Word, you can click **File > Share > Email > Send as PDF**. A new email will appear with your invoice attached as a PDF. Send the email.
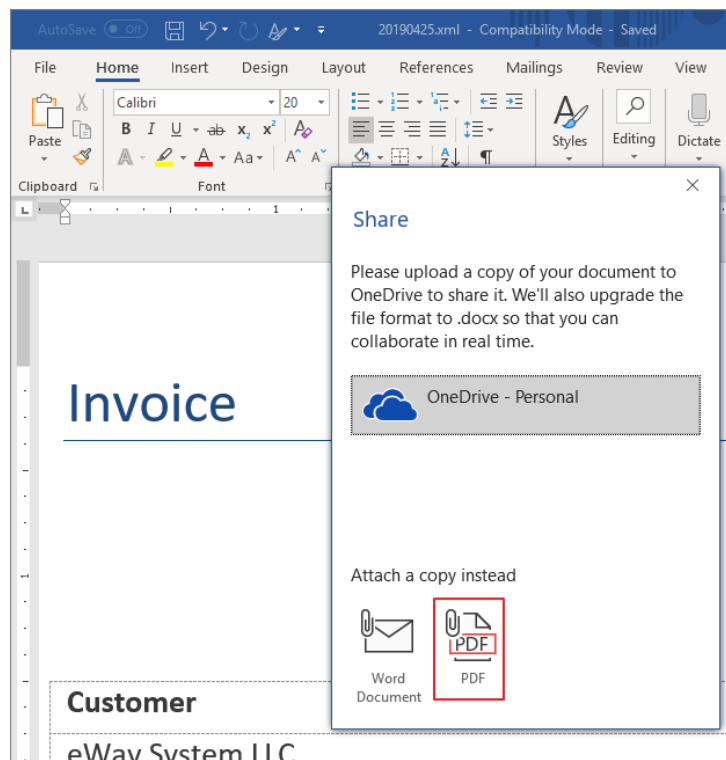
7. If you go back to the project page, you will find your bookkeeping record in the **HUB** or under the tab **Bookkeeping**. Also, please note, that the project price changed according to the sales invoice.

Tip for you: To add a purchase invoice, just choose the proper type in step (3). The invoice will appear under **Other Costs** on the project dialog.

Tip for eWay-CRM® Premium: Have a look at your mobile app and find the project. You will see all the information in the HUB. This way, you can access your eWay-CRM® data on the go.

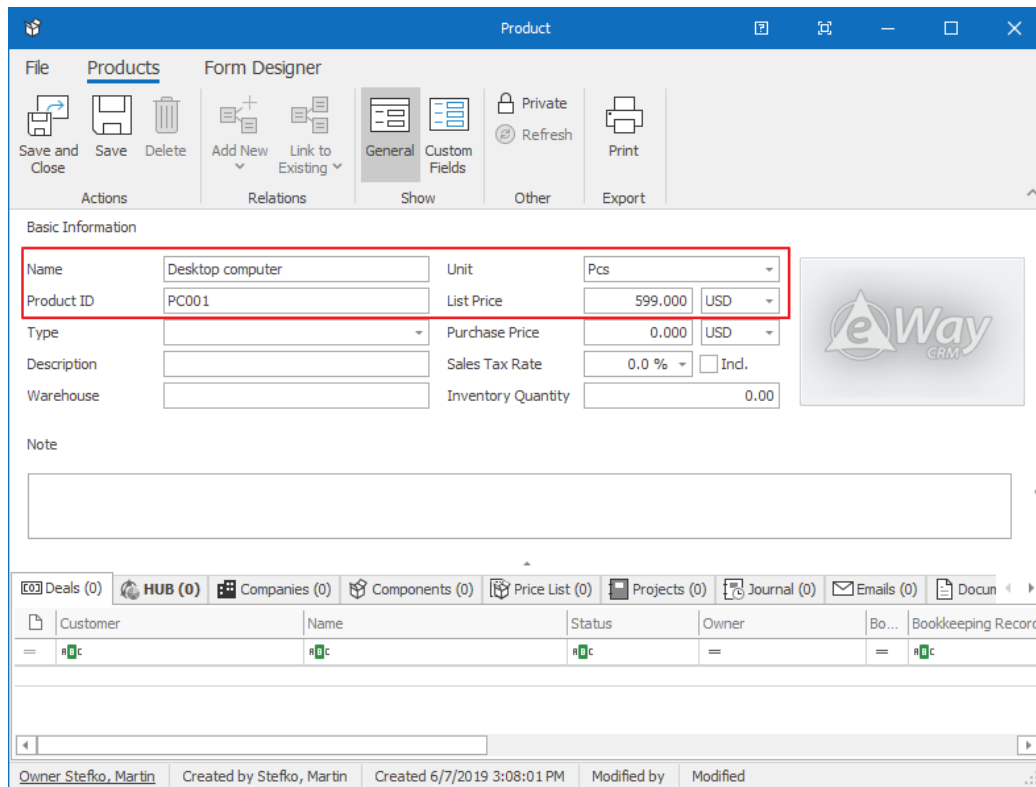## Quotes and Billing

Step 1: Make List of Your Products/Services

To start selling, you need to clarify the prices. If you sell goods, create a list of all your stock items. If you provide services, list them too, and specify your hourly rate.

To Make a List Manually:

1. Click **New** on the eWay-CRM® ribbon and select **Products**.
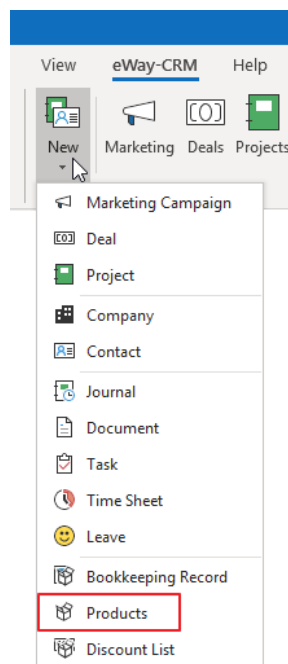
2. Specify the **Name, Product ID, Unit**, and **List Price**. Click Save and Close.

Tip for you: You can import products from an Excel spreadsheet or customize the list of units. See the links below.
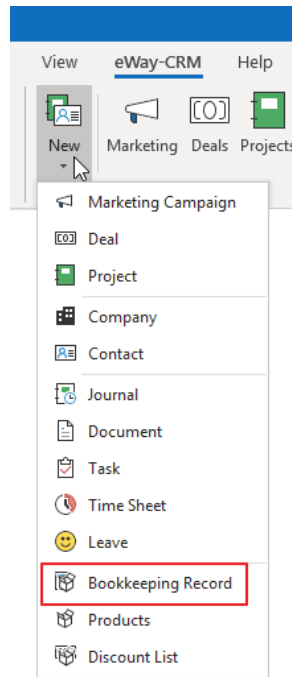
How to Import Data From Microsoft Excel

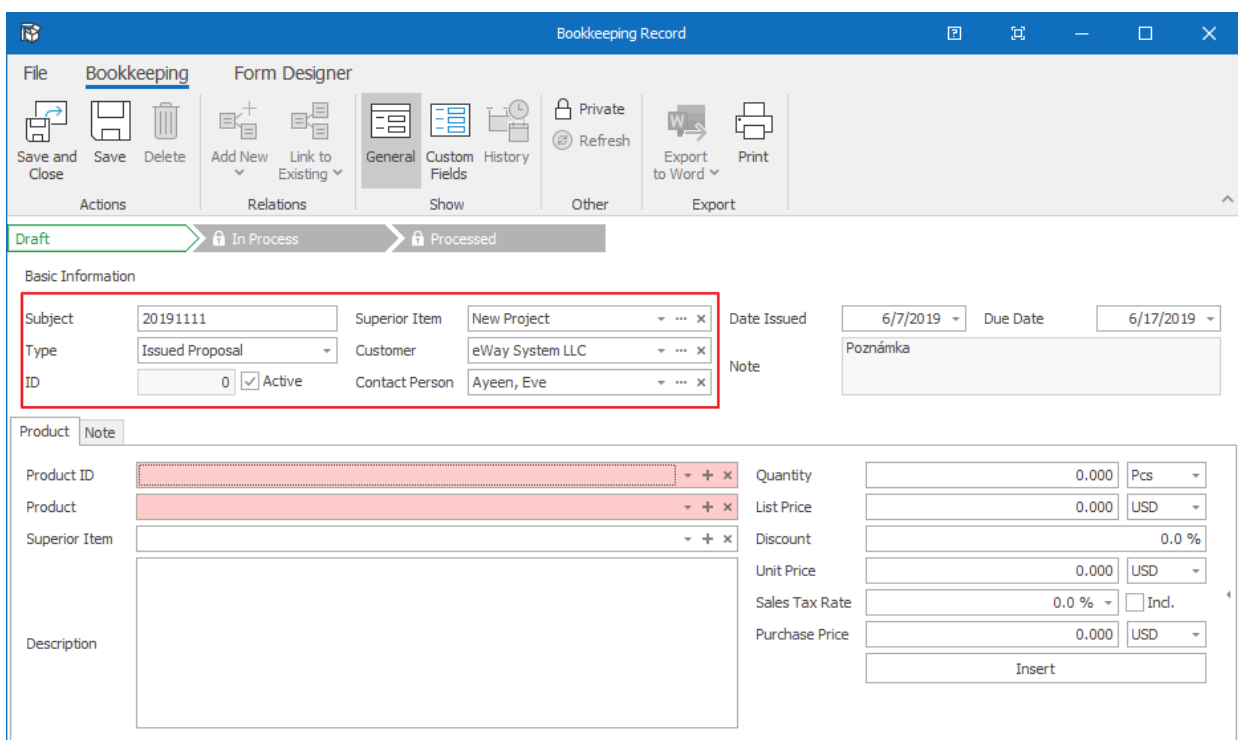How to Customize Drop-Down Menus

Step 2: Create Quotes and Invoices

eWay-CRM® makes creating proposals and invoices simple, reliable, and efficient. Use your product catalog to determine the price automatically.

Creating a Proposal

1. On the eWay-CRM® ribbon in Microsoft Outlook, click **New** and select **Bookkeeping Record**.

2. Choose a **Name**, select the type called **Issued Proposal**. Click **Active**. Also, select **Customer** and **Superior Item** if you want to add the proposal to a business deal or a project.
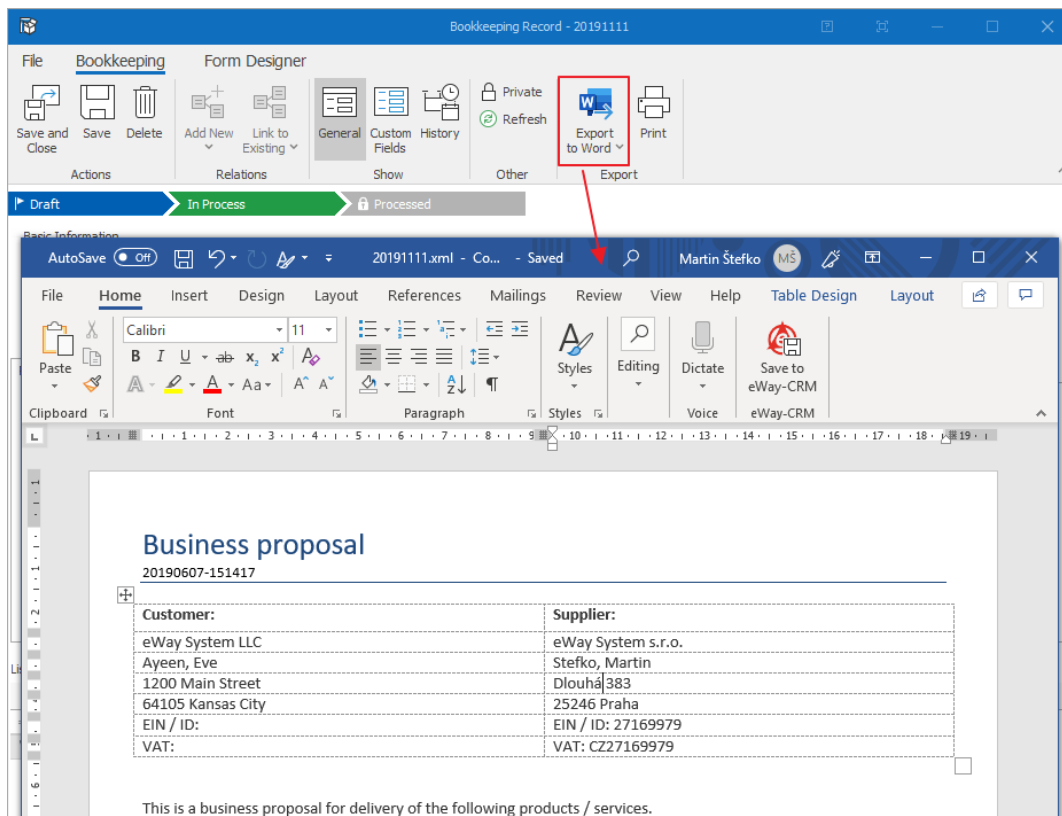
3. Add products/services into the bookkeeping record. You can search for them by **ID** or **Name**. You can change the **Quantity**, **Sale Price**, or apply a **Discount**.

4. As soon as you create the proposal, save it.

5. Click **Export to Word > Proposal**. A Microsoft Word template will open with predefined data.
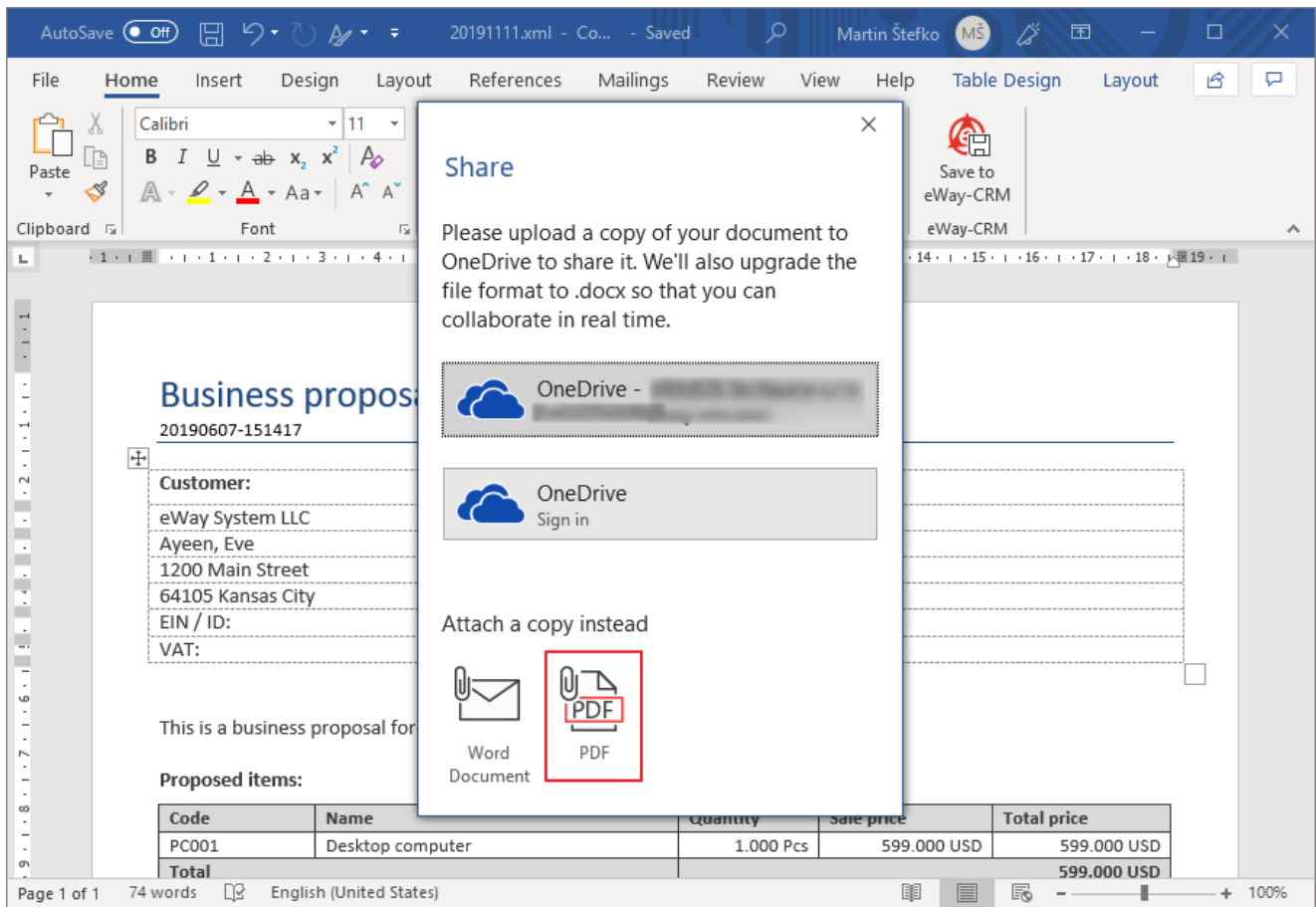
6. Click **File > Share > Send as PDF**. A new email will appear with your quote attached as a PDF. Send the email.

Creating an invoice is similar. Just choose the **Sales Invoice** in step 2.

Tip for you: To link emails sent from Microsoft Outlook to eWay-CRM®, please have a look here: **How to Link Emails to Deals**

Timesheets & Resource Planning

Step 1: Manage Your Team Members' Availability

Start determining available capacity. See how much time each team member can dedicate to a project every week and plan accordingly.

1. In the eWay-CRM® ribbon, click **Users** and switch the view to **Work Commitments**. You will see a list of eWay-CRM® users and calendar weeks in columns.
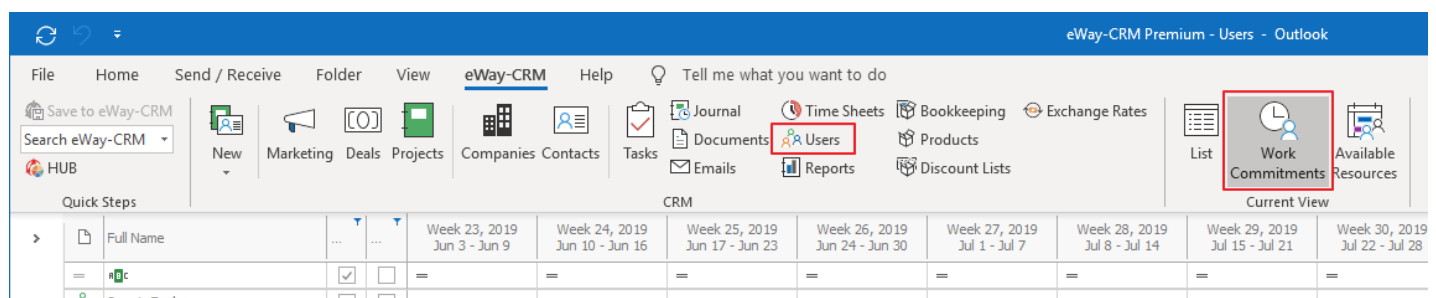
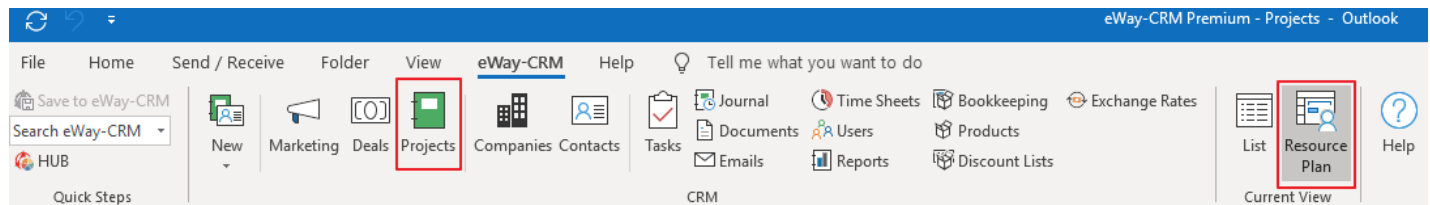2. Click into a cell and assign how many hours each employee spends at work.

📄	Full Name			Week 23, 2019 Jun 3 - Jun 9	Week 24, 2019 Jun 10 - Jun 16	Week 25, 2019 Jun 17 - Jun 23	Week 26, 2019 Jun 24 - Jun 30
=	ᴀ🅱c	☑	☐	=	=	=	=
👥	Smart, Evelyn	☑	☐	40	40	40	40
👥	Halloway, Josh	☑	☐	40	40	40	40
👥	Lee, Stan	☑	☐	20	20	20	20
👥	Espozito, Richard	☑	☐	40	40	40	40

3. Use copy-paste to distribute the values fast.

Step 2: Assign People to Projects

We already know it from the previous tutorial. Just to repeat it.

1. In the eWay-CRM® ribbon, click **Projects** and switch the view to **Resource Plan**.

2. You will see a list of your projects along with the team members assigned to each job. You will also find a list of calendar weeks in the following columns.

3. Click into each cell and type down how many hours you'd like to allocate the specific team member on a particular project in the selected week. If you overload an employee, the value will change to red.
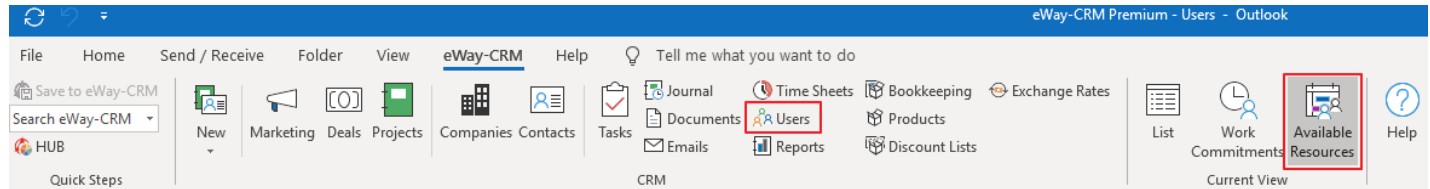

4. You can copy-paste the values to speed up the process.

Step 3: Monitor Availability

Check people's workload to find out who is overloaded and who has time for a new project.

1. In the eWay-CRM® ribbon, click **Users** and switch the view to **Available Resources**. You will get a list of eWay-CRM® users and calendar weeks in columns.

2. Each cell will contain the number of hours that the team member is available. The more available she/he is, the darker the green background is.
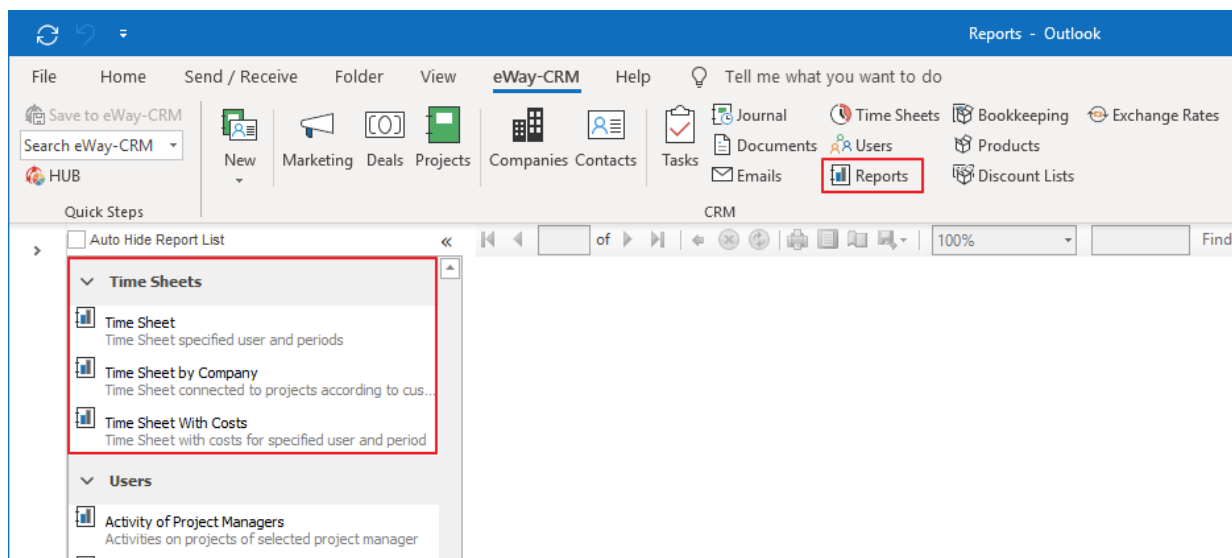

3. Use this view to plan your projects and people wisely.

Step 4: Create and Use Reports

Monthly timesheet reports clarify the amount of work that has been done. They can also be used to back up your billing. Find out which tasks you and your employees spend the most time on.

1. In the eWay-CRM® ribbon, click **Reports**. Find the reports from the section **Timesheets**.

2. Go through the individual reports to create your statistics. Have a look at **Time Sheet by Company**. There, you will find how many hours you had spent working for a particular client last month. Send him an invoice.

Time Sheet by Company

Company: Bertram Ltd. • Period: 201705 • Approved Only: No

| Subject	Project	User	Type	Date	Start	End	Duration	Costs
Preparation	New Project	Goodman, Jane	Work on Project	5/29/2017	9:00 AM	10:35 AM	1.58 hrs	$158.00
Internal Meeting	New Project	Goodman, Jane	Work on Project	5/29/2017	10:35 AM	12:00 PM	1.42 hrs	$142.00
Product Redesign	New Project	Goodman, Jane	Work on Project	5/29/2017	12:00 PM	4:00 PM	4 hrs	$400.00
Total							**7 hrs**	**$700.00**

3. You can export any reports to PDF, Excel, or Word.

💡 **Tip for you:** Find out more about reports here.
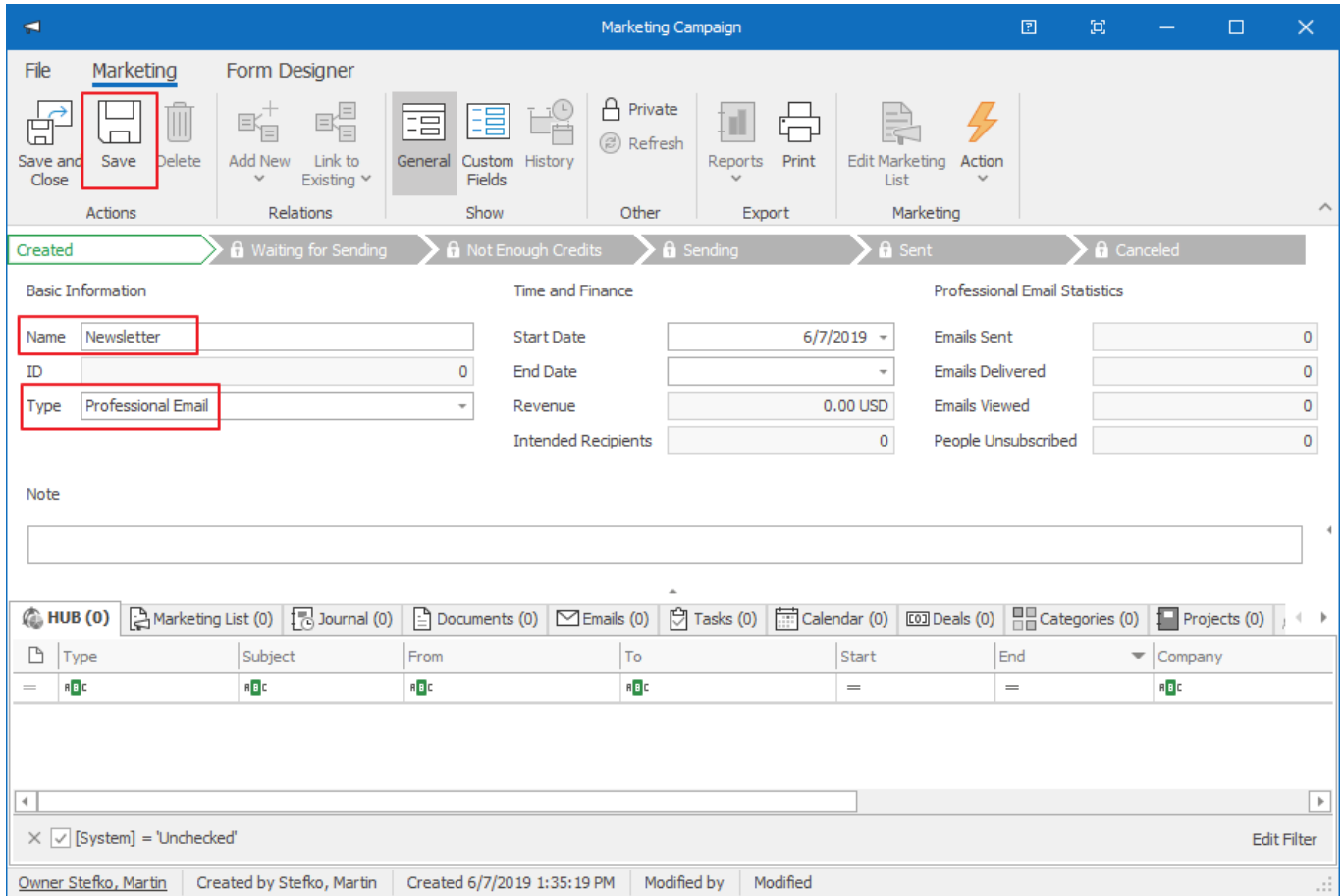
Marketing – Bulk Messages

Step 1: Create a Marketing Campaign

Every marketing campaign should have its record in eWay-CRM®. Start from scratch and set your campaign up.

1. Click **New** on the eWay-CRM® ribbon and select the **Marketing Campaign**.
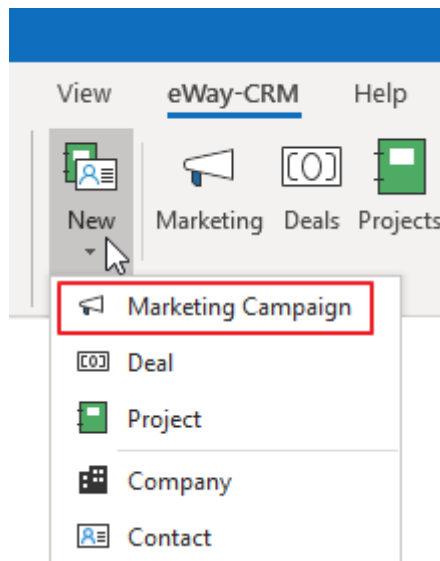
2. Specify the **Name** of the marketing campaign (e.g. Newsletter) and make sure that **Professional Email** type is selected. Click **Save**.

Step 2: Make List of Recipients

Choosing your audience influences how relevant your communication is. Pick your contacts carefully to get the best results.
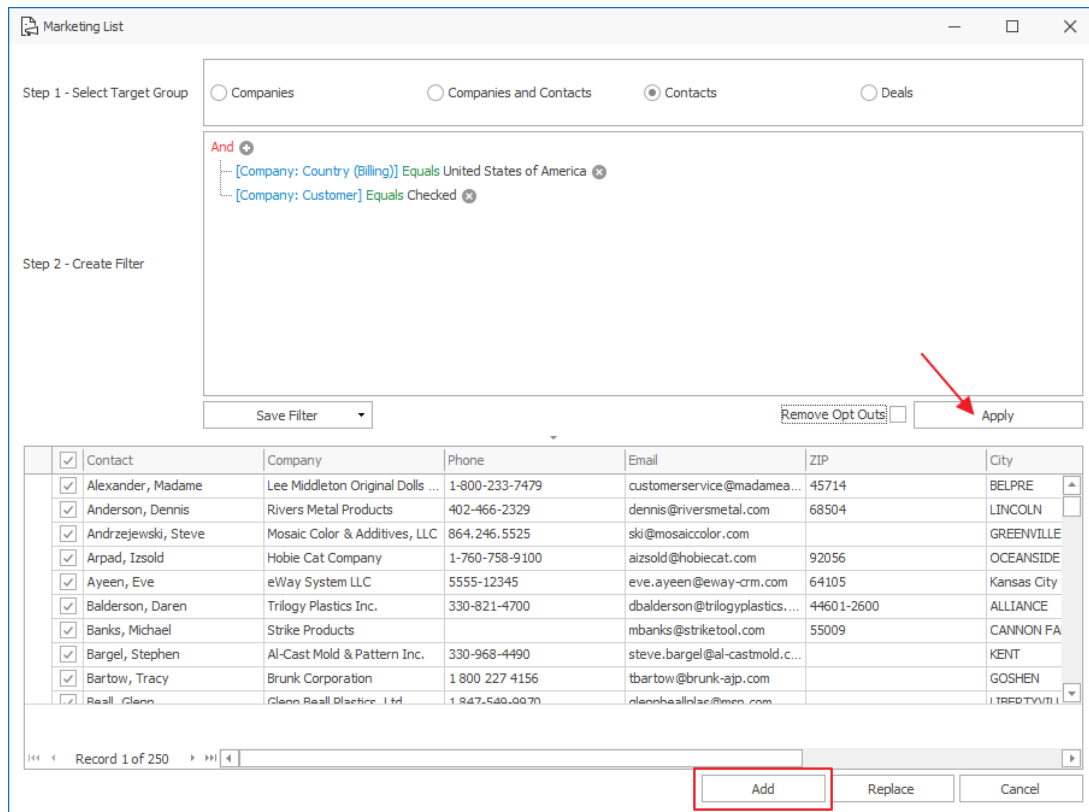
1. Click the **Edit Marketing List** tab.

2. In the new window, select a target group and create a filter. Click **Apply** and **Add**.

Tip for you: You can filter contacts by various attributes. To find out more, visit our documentation here.

3. You will be redirected back to the marketing campaign. Under the tab **Marketing List**, you will find a list of addresses.

Step 3: Prepare Message and Send It

You can build your newsletter from scratch or use a predefined template.
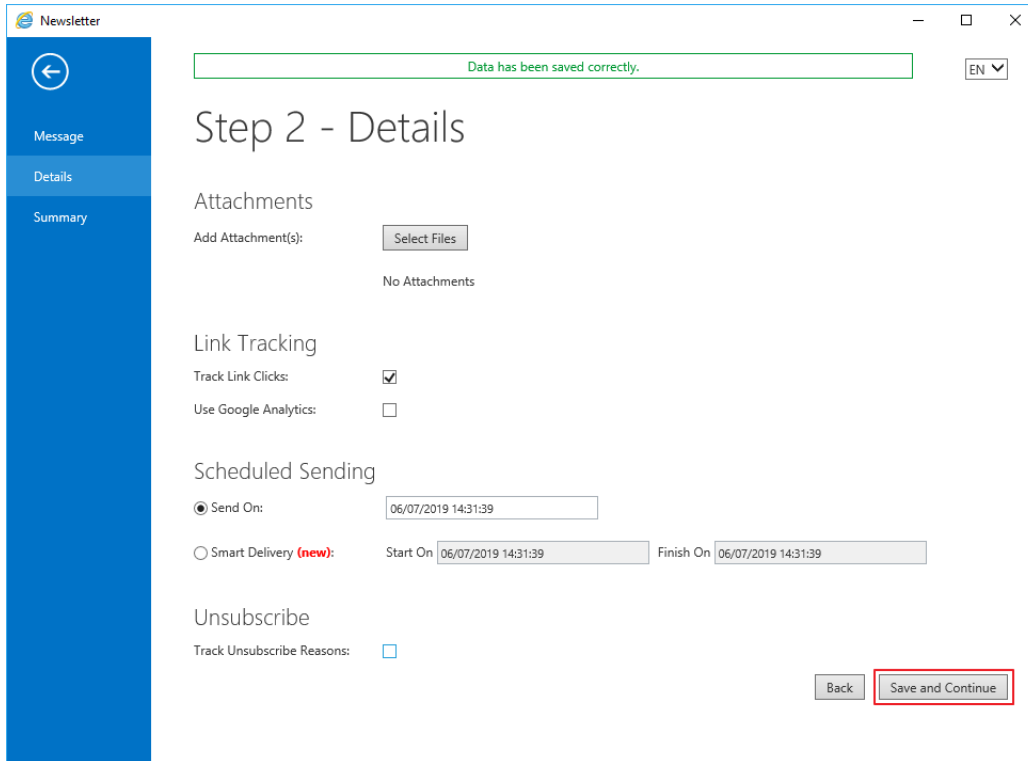
1. Click **Action > Send Bulk Email**.
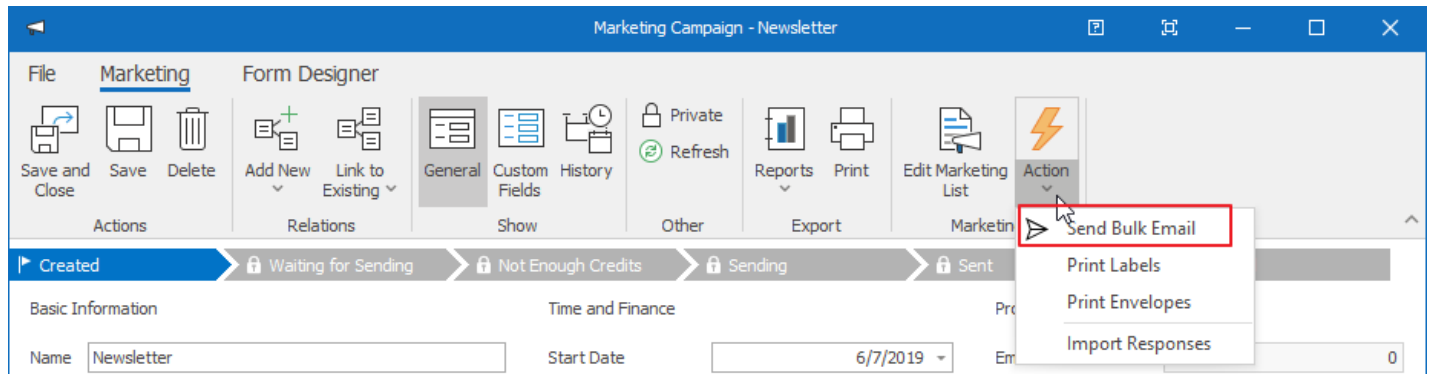
2. In the **Message** panel, specify the **Subject, Sender Email**, and **Sender Name**. Click Use text from to choose whether you want to utilize one of the predefined templates or upload your own HTML template. Click **Save and Continue**.
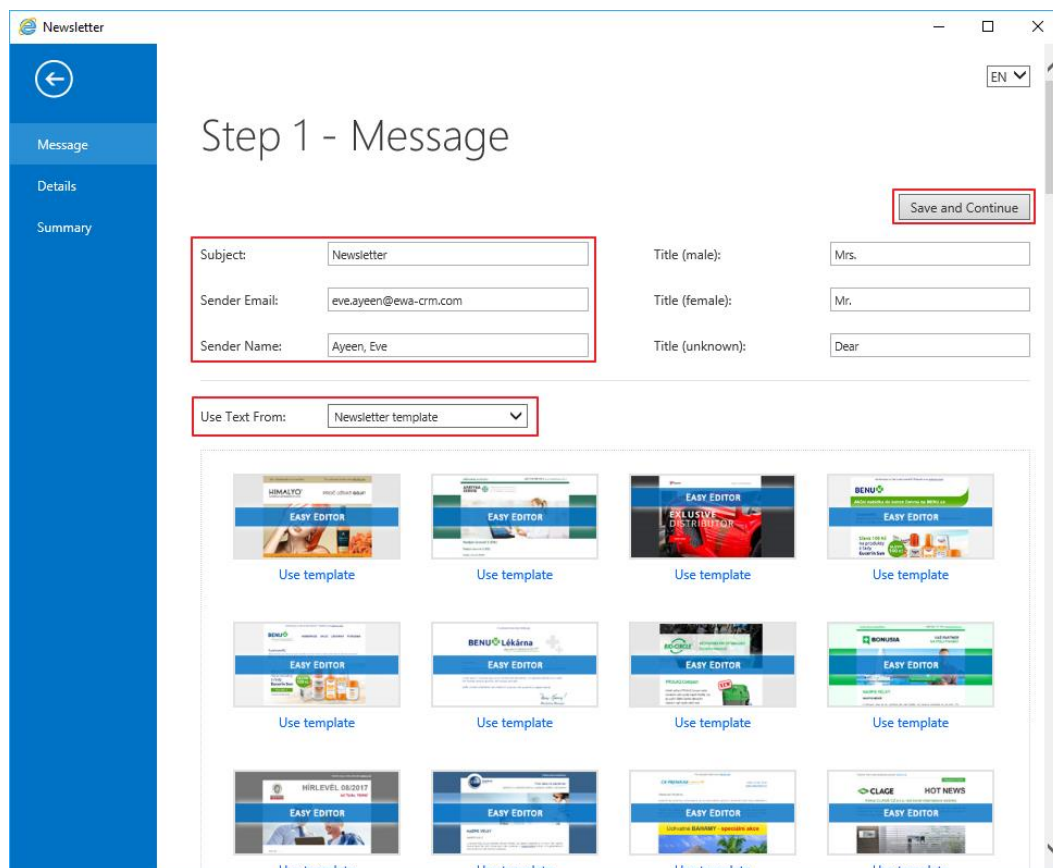
3. On the **Details** panel, you can add attachments and specify other additional options (Track Link Clicks, Google Analytics, Send Date, Unsubscribe Reasons). Click **Save and Continue**.

4. Double-check your settings on the summary screen. As soon as you are happy with the campaign, click **Send and close**.

Note: eWay-CRM® uses an engine of a professional 3rd party mail merge tool that makes sure your emails are delivered without any problems, and you are not marked as a spammer. eWay-CRM® is also able to provide a detailed activity tracking report as shown below. You can send 1000 emails for free. After that, you can buy credits (one credit per email) with your credit card.

Step 4: Receive Feedback
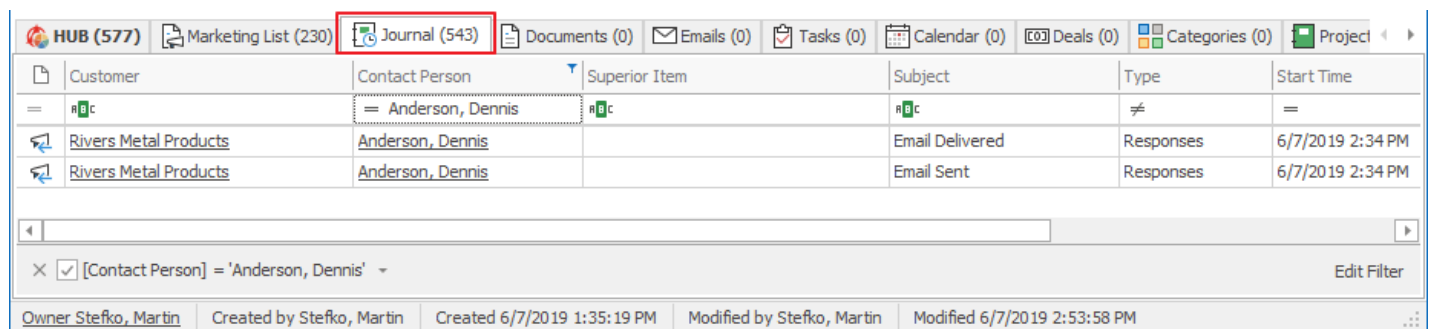
Analyze the results and find out how many people have received your email, who opened it, or clicked the link. Using such data and collecting feedback greatly improves the success rate in the future.

1. You will see the first responses in 30-60 minutes, but it pays off to wait a few days to get the whole picture. You can find general statistics on the card of the campaign.

2. You can also check the result for each email address separately. Just double click on the **Responses Count** for each contact.

💡 **Tip for you:** There is also a report available in **eWay-CRM® > Reports > [Marketing Results](#)** for a detailed view.

Marketing – How to Increase Delivery Rate of Your Emails

Tip 1: Increase Delivery Rate of Your Emails

Whether your email is delivered or not, depends on many variables. Most of them are under your control. You just need some time to focus on them.

1. **Set SPF Records**
    SPF (Sender Policy Framework) is a mechanism that allows you to define servers that have permission to send emails from your domain. Thanks to the setting, the Professional email server can be publicly authorized to send emails by your name.

    How to Set SPF Records
    How to Check That Your SPF Is Correctly Set

2. **Set DMARC**
    DMARC (Domain-based Authentication, Reporting, and Conformance) is another technology designed as prevention of your domain abuse. A principal is common as for SPF – it should be set correctly.

    How to Set DMARC
    How to Check That Your DMARC Is Correctly Set

3. **Set DKIM**
    DKIM (Domain Keys Identifier) is a tool that allows the electronic signature of your email header. Because our emails are delivered from the Emailkampane.cz server, this parameter is not correctly set itself.

    How to Set DKIM
    How to Check That Your DKIM Is Correctly Set

4. **Use SPAM Assassin Function**
    SPAM Assassin is a technology that checks specific parameters of your email that should be delivered. In the last step of marketing email creating, there is a link that shows you the SPAM score of your message. Try to improve your email with this function!

Spam Assassin

Control name	Description	Result
SPF Authentification	SPF record is OK	✓
DKIM signature	Email is signed by DKIM.	✓
TLS Encryption	Email will be encrypted individually.	✓
Blacklist Verification	Servers Are Not Blacklisted	✓
Custom Tracking Domain	Not set - more here	⚠
Sender Email	Sender Email is OK	✓
Email Subject	Email Subject is OK	✓
Email Content	Email Content is OK	✓

Tip 2: Get the Consent with Sending Emails (Do Not Forget GDPR)

GDPR is still with us! Do not forget that you need consent to work correctly with your contacts. To proceed with everything correctly, we prepare a complete manual for you.

Tip 3: Contact Your Contacts as Human

Even though the algorithm is managing to send off emails, this does not mean that messages should look like from robot.

The algorithm is capable to address a message to a woman or man, but you can specify other concrete information in your message.

Tip 4: Customized Gadgets

Are you serious about your newsletters? Do not be satisfied with the model templates. Give your templates your look. Be professional!

1. **Customized Template**
   Do you have a corporate visual style and want your emails compatible with it? We can prepare a template right for you.

   Contact us

2. **Own Tracked Domain**
   To give you the most advanced statistics, we need to change all links in an email on automatically generated codes. But these are not as pretty as www.yourdomain.com. That is why we are using the technology of the tracked domain.

   Contact us, we will be glad to explain to you everything

3. **Automatic Campaigns**
   Are you sending a series of emails? Or do you want to send a set of emails to your respondents? We have a solution for you.

   Contact us