

Mass Creation of Meetings

With this webCRM functionality you can distribute meetings for your users on a number of organisations from a report. This is useful to secure visits to existing customers to sell more or as part of a retention programme, e.g. by creating a series of meetings every third month for your most important customer segment and less frequent for other segments. The functionality is useful when working with leads as well, for example to create distribute meetings on all leads from a Marketdata import, an imported list or old leads in the system.

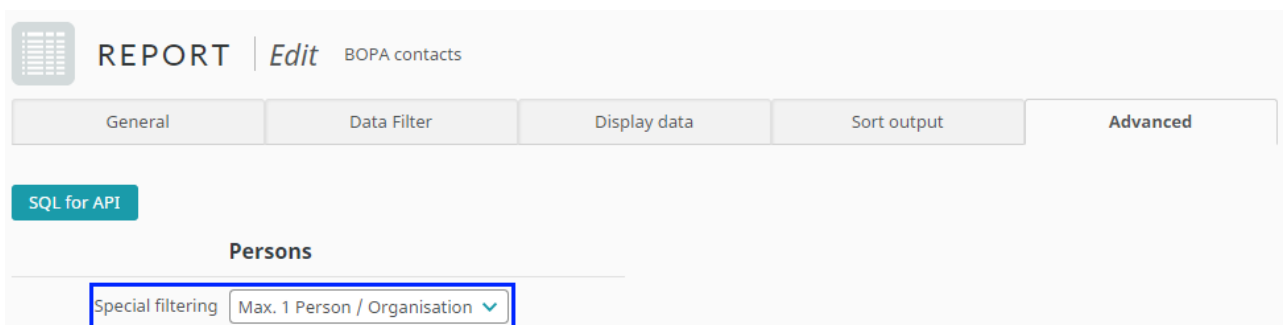
In this document you will be guided through the necessary steps to mass create meetings.

1. Segmentation

The creation of meetings are based on a report in webCRM, where you segment the organisations you want to create meetings for. This can for example depend on the organisation type (customer/lead/partner), their the status (A/B/C customer), postal code, or something different.

You can also use the functionality on reports for persons, activities, opportunities and orders, e.g. if you want to visit all customers you sold to last year, but have not yet sold to this year.

Be aware that this can create multiple meetings per organisation, which is not always desirable. In the next step, you can manually exclude meetings and for person reports, a special filter under the Advances tab can limit the report to one person per organisation.



To mass create meetings from a report, this has to be activated from the Advanced tab:

The screenshot shows the 'REPORT' interface with the 'Advanced' tab selected. The 'Create meetings' option is highlighted with a blue box.

REPORT | *Edit*

General | Data Filter | Display data | Sort output | **Advanced**

SQL for API

Organisations

Special filtering: --- None ---

Special actions

Enabled actions: View position at map

Map overlay URL: [input field]

Create activities: Enabled

Create meetings: Enabled

When you have made the segmented report you need to consider the order the meetings should be created in, by sorting the list in that order. The sorting can be changed by clicking a headline in the report, to sort it by the values in that column. Click once or twice depending on the desired order. More advanced sorting can be setup in the Sort output tab, where you can choose up to three criteria to sort by.

It can be a good idea to sort by postal code, to minimise the distance between the meetings. If the meetings are distributed to multiple users, the first user will get the first part of the list, e.g. the first 20 of 60 meetings. Hereby the first users gets the 20 lowest postal codes that in many countries will be organisations near each other, compared to another sorting.

MASS CREATION OF MEETINGS

webCRM
14-06-2017 14:34

★
📄
📊
Σ
📍
📋
📅
🖨️
⋮
↺

← 1 2 →

Rows/page

30

1-30 (51)

Standard

		Name	Address	Post code/ZIP ▲	City	Country
✎	👁	Brdr.Strecker V/ Ole Strecker	Nyhavn 61	1051	København K	Denmark
✎	👁	Dubrow's Cafeteria	Blæsenborgvej 62	1057	København K	Denmark
✎	👁	Sportmaster	Rødovrevej 3	1256	København K	Denmark
✎	👁	ALE Invest A/S	Vestergade 29 Kld	1456	København K	Denmark
✎	👁	Færgeskroen I/S	Vesterbrogade 3	1620	København V	Denmark
✎	👁	Carlsberg Supply Company Danmark A/S	Vesterfælledvej 6	1750	København V	Denmark
✎	👁	Kødbyen Brygpub ApS	Humletorvet 27 3	1799	København V	Denmark
✎	👁	Mikkeller ApS	Humletorvet 27 3	1799	København V	Denmark
✎	👁	Fætter BR	Hviovrevej 3	2345	Hvidovre	Denmark
✎	👁	Jutlaend I/S	Carl Jacobsens Vej 17M 2 th	2500	Valby	Denmark

When you are satisfied with your list, both the order and the number of entities, you can click the **Create meetings** icon in the top to continue.

2. Exclude entities

On the next screen you will be able to exclude some entities from the list. This can for example be customers with special circumstances or organisations occurring multiple times because of the report filter. In the top you can see the number of different organisations, in addition to the number of entities in the report.

You can exclude entire pages or all entities and thereafter deselect the organisations you want to create meetings for, if only a few from the report are relevant.

MASS CREATION OF MEETINGS

webCRM
14-06-2017 14:37

+ Continue
← Back
Mark any instance to be excluded

Different organisations: 51

← 1 2 →
Rows/page 1-30 (51)

Page All Standard ▾

	Name	Address	Post code/ZIP ▲	City	Country
<input type="checkbox"/>	Brdr.Strecker V/ Ole Strecker	Nyhavn 61	1051	København K	Denmark
<input checked="" type="checkbox"/>	Dubrow's Cafeteria	Blæsenborgvej 62	1057	København K	Denmark
<input type="checkbox"/>	Sportmaster	Rødovrevej 3	1256	København K	Denmark
<input type="checkbox"/>	ALE Invest A/S	Vestergade 29 Kld	1456	København K	Denmark
<input checked="" type="checkbox"/>	Fægekroen I/S	Vesterbrogade 3	1620	København V	Denmark
<input type="checkbox"/>	Carlsberg Supply Company Danmark A/S	Vesterfælledvej 6	1750	København V	Denmark
<input type="checkbox"/>	Kødbyen Brygpub ApS	Humletorvet 27 3	1799	København V	Denmark
<input type="checkbox"/>	Mikkeller ApS	Humletorvet 27 3	1799	København V	Denmark
<input type="checkbox"/>	Fætter BR	Hviovrevej 3	2345	Hvidovre	Denmark
<input type="checkbox"/>	Jutlaend I/S	Carl Jacobsens Vej 17M 2 th	2500	Valby	Denmark

When you are satisfied, click **Continue**.

3. Meeting set-up

On the next screen you can set up the meetings' field values for both standard and custom fields. For example the meeting location can be set to in or out of office and the description can be chosen. If you have custom fields to manage campaigns or likewise, you can fill out these to be able to create statistics for this series of meetings.

The screenshot displays the 'MASS CREATION OF MEETINGS' interface. At the top right, it shows 'webCRM 14-06-2017 14:38'. Below the title, there are navigation buttons: a green '+ Continue' button and a blue '← Back' button. A status message reads 'Create meetings. Total 49. (2 Instances has been excluded)'. A note says 'Click "Continue" to edit greyed fields'. The form is divided into two columns. The left column contains standard fields: 'Responsible' (text), 'Person' (text), 'Date' (calendar and clock icons), 'Duration hours' (text), 'Status' (dropdown menu with 'Draft' selected), 'Purpose / description' (text with 'Visit A customers'), 'Location' (dropdown menu with 'Meeting out'), and 'Comment' (text area). The right column contains custom fields, some of which are greyed out. A blue diagonal watermark reads 'CUSTOM FIELDS FROM YOUR SYSTEM'. The custom fields include: 'Meeting number' (text), 'Meeting title' (text), 'Meeting type' (dropdown menu with 'Select --'), 'Meeting start date' (text with '14-06-2017'), 'Meeting end date' (text), 'Meeting start time' (text with '14:00:00'), 'Meeting end time' (text with '14:30:00'), 'Meeting location' (dropdown menu with 'Meeting out'), 'Meeting description' (text), 'Meeting category' (text), 'Meeting status' (text), 'Meeting type' (text), and 'Participants' (text with a pencil icon).


To plan meeting dates and time, click **Continue**, which lets you set up the greyed out fields.






























4. Plan the meetings

You now have to plan when the meetings should be scheduled for and who should be responsible.

To plan the timing, you select a start date, where the first meeting will be planned for, and fill out the calendar for when you want meetings to occur in a standard week. This will be the schedule for a week without public or individual holidays for the users, which the system will take into account based on the holiday calendars in webCRM.


In the standard calendar, the time intervals where meetings should be scheduled has to be inputted. The setup is made to include a lunchbreak, but if this is not desirable, the end time of the morning working hours can be set to the same time as the start of the Afternoon working hours.

Start date 

	Morning		Lunch	Afternoon		
	From hour	To hour		From hour	To hour	
Monday	<input type="text" value="09:00"/> 	<input type="text" value="12:00"/> 		<input type="text" value="12:30"/> 	<input type="text" value="16:00"/> 	
Tuesday	<input type="text" value="09:00"/> 	<input type="text" value="12:00"/> 		<input type="text" value="12:30"/> 	<input type="text" value="16:00"/> 	
Wednesday	<input type="text" value="09:00"/> 	<input type="text" value="12:00"/> 		<input type="text" value="12:30"/> 	<input type="text" value="16:00"/> 	
Thursday	<input type="text" value="09:00"/> 	<input type="text" value="12:00"/> 		<input type="text" value="12:30"/> 	<input type="text" value="16:00"/> 	
Friday	<input type="text" value="09:00"/> 	<input type="text" value="12:00"/> 		<input type="text" value="12:30"/> 	<input type="text" value="16:00"/> 	
Saturday	<input type="text"/> 	<input type="text"/> 		<input type="text"/> 	<input type="text"/> 	
Sunday	<input type="text"/> 	<input type="text"/> 		<input type="text"/> 	<input type="text"/> 	

The standard time is set to 9-12 and 12.30-16 for the weekdays and no meetings in the weekend. If you want different times for all weekdays, you can input the desired times for Monday and click the Copy icon, to paste the inserted times to all weekdays.


Weekends have to be filled out seperatly or can be left blank, if no meetings should occur in the weekend. The same goes for mornings or afternoons, where no meetings should be created, where the interval can be left blank.


Duration hours 


Interval

Skip public holidays

Skip personal day offs

Responsible 

User 1 

User 2 

Below the scheme the duration of the meetings and the interval between meetings is inputted. This should reflect the break and travel time between meetings.

You can choose whether the meetings should skip public holidays and personal days off, based on the webCRM calendar.

Below this, you have to select which users should be responsible for the meetings. This can either be the Organisation responsible or 2nd responsible or the meetings can be distributed to one or more users equally.

Click **Continue** to get to the next screen, where you get an overview of how your choices affect the period with meetings.

5. Confirm the planning

On this screen you will see how many meetings can be scheduled for a standard week and when the selected users are done with the series of meetings you are about to create.

Initially you should consider if you are satisfied with the number of meetings in a standard week and make sure that there are not too few or many meetings compared to the expectations you have for the responsible users.

You risk that the working hours and duration of meetings means that you can have only one meeting in the morning, but you might be able to fit two meetings by making minor adjustments, if relevant. The functionality is made never to exceed the chosen working hours, which means that only one meeting of 1,5 hours can occur in a morning of 3 hours, if an interval between the meetings are selected. This way a user can have a meeting at 9-10.30 and thereafter an interval to 10.45, which means that another meetings cannot be fitted before 12 o'clock. By moving the lunch break 15 minutes, to meetings can fit in the morning and the meetings can be scheduled in a shorter period of time.

You can go back and change the working hours, the duration or the interval between meetings, to create a satisfying number of meetings per week.

Standard week: max 25 meetings	Morning	Afternoon
Monday	09:00 - 12:00: 2 Meetings	12:30 - 16:00: 3 Meetings
Tuesday	09:00 - 12:00: 2 Meetings	12:30 - 16:00: 3 Meetings
Wednesday	09:00 - 12:00: 2 Meetings	12:30 - 16:00: 3 Meetings
Thursday	09:00 - 12:00: 2 Meetings	12:30 - 16:00: 3 Meetings
Friday	09:00 - 12:00: 2 Meetings	12:30 - 16:00: 3 Meetings
Saturday		
Sunday		

Duration - **01:00**

Interval - **00:15**

When you are satisfied with the number of meetings per week, you can see when the selected users are through their meetings and thereby how long you occupy them.

If meetings are created on the responsible or 2nd responsible of the organisations, a large difference between the end date can occur. An equal distribution of meetings to a number of users can generate different end dates, if some users are on holiday or having personal days off during the meeting period.

Create **49** meetings

Start date: **14-06-2017**

Distributed on **2** users:

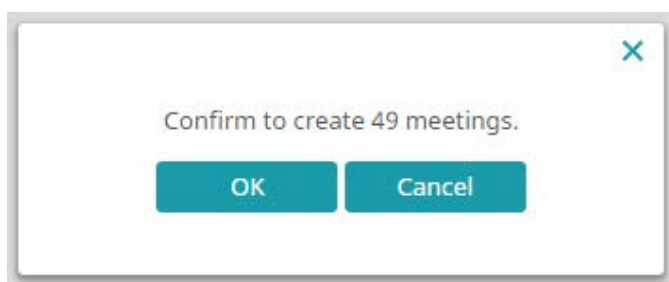
Christine Kayser

25 meetings | Last meeting: **23-06-2017**

Jørgen Rode

24 meetings | Last meeting: **21-06-2017**

You can go back to edit your choices until you are satisfied with the planned meetings. Then you click **Create meeting** and confirm the number of meetings that will be created.



Be aware that if you use the Exchange, Outlook or Google integration to synchronise meetings with webCRM, creation of many meetings can take multiple cycles of synchronisation and thus delay the synchronisation of other instances.

6. Delete meetings

If you have made a mistake during the mass creation of meetings after creating the meetings, you can delete the meetings using a report.

All meetings created using this functionality gets the same value in the Created by field, which you can use as a parameter to get all meetings from a mass creation shown in a report. Under the **Advanced** tab when editing the report, you can enable **Delete data**, which will enable you to delete all meetings on the overview.

The screenshot shows the 'REPORT Edit' interface for 'BOPA contacts'. At the top, there are tabs for 'General', 'Data Filter', 'Display data', 'Sort output', and 'Advanced'. Below these tabs, there is a 'SQL for API' button. Under the 'Persons' section, there is a 'Special filtering' dropdown menu set to '--- None ---'. Under the 'Special actions' section, there is an 'Enabled actions' dropdown menu set to 'Delete data', which is highlighted with a blue border.

Note: Delete the meetings immediately when you realise that they are incorrect. Meetings synced to your calendar outside webCRM through the Exchange, Outlook or Google integration will not be deleted by this and can thus cause confusion.