# Grass CRM

## Help Document

Version 2.0

**Version History**

| Version | Date | Author | Description |
|---|---|---|---|
| 1 | 3/3/2013 | Feng | Initial version |
| 1.1 | 3/9/2013 | Feng | Refine Dropdown Option |
| 1.2 | 3/19/2013 | Feng | (1)Refine Upload page<br>(2)Add "Send Invitation" function for Call and Meeting |
| 1.3 | 03/31/2013 | Feng | (1)Refine relate page<br>(2) Add Iframe to fix menu flicker issue |
| 1.4 | 04/26/2013 | Feng | Add Grass CRM mobile version |
| 1.5 | 05/03/2013 | Feng | (1)Support campaign email function<br>(2)Fix some bugs. |
| 1.6 | 05/14/2013 | Feng | (1)Support email template<br>(2)Add campaign&meeting&call send invitation page<br>(3) Add related record for Mobile Grass page |
| 1.7 | 05/26/2013 | Feng | (1)Support email template mail attachment<br>(2)Add google map support for meeting location in mobile grass project<br>(3) Add email template support for meeting/call invitation mail |
| 1.8 | 06/15/2013 | Feng | (1)Fix lead convert error<br>(2)Add Change Log function |
| 1.9 | 06/29/2013 | Feng | (1)Add Account Report function |
| 1.10 | 07/07/2013 | Feng | (1)Add other reports |
| 1.11 | 08/17/2013 | Feng | (2)Add forget password and change password function |
| 2.0 | 09/01/2013 | Feng | (1) Add Calendar<br>(2) Add relationship count indicator<br>(3) Has refined the transaction code. |

# 目 录

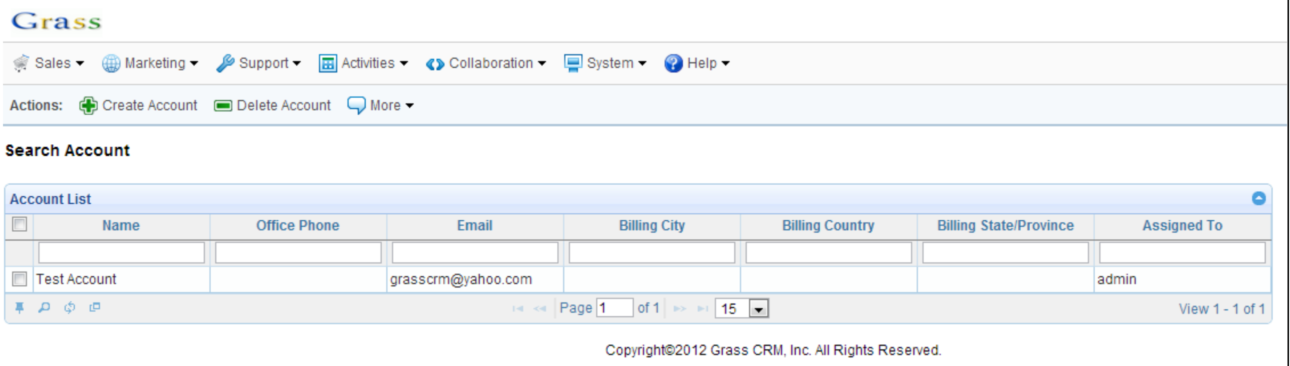
# 1. System Introduction

Grass CRM system is an open source Java system, its target is to provide the best open source CRM system to all end user, and it's open for all developers who are willing to add or enhance this system.

# 2. Grass CRM System Function

## 2.1 Common UI

### 2.1.1 List Page




2-1-1 List Page

The above is the common list page UI:

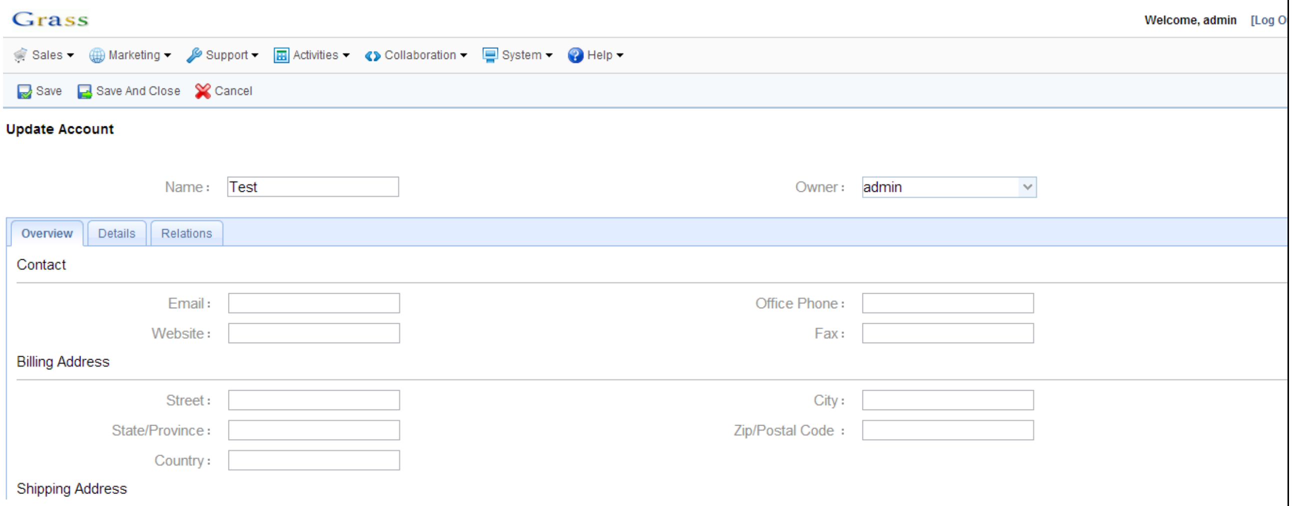
(1)**Actions menu:**

Create Button: when click this button, will open create page to create a new record.
Delete Button: delete the selected records in the datagrid.
Import Button: import the records from csv.
Export Button: export the selected records as csv file.
Mass Update Button: mass update the selected records.
Copy Button: copy the selected records in the datagrid

(2)**Data Grid**

Search Toolbar: filter the records in the datagrid.
Datagrid: list the filtered records.
There are four icons:
Toggle Search Toolbar: toggle the search toolbar.
Advanced Search: open the advanced search dialog.
Clear Search: clear the filter condition and reset datagrid.
Reorder Columns: can hide/unhide the columns in the datagrid.

### 2.1.2 Add/Edit Page




2-1-2 Add/Edit Page

(1)**Actions menu:**

Save Button: save the change and stay at the current page.
Save and Close Button: save the change and return back to List page.
Cancel Button: cancel the change and return back to List page.

(2)**Information zone:**

Name: record name
Overview tab: the main information of the record.
Detail tab: include the description and system information
Relation tab: include the relation information.

## 2.2 Account

Accounts are the placeholders for customers, prospects, suppliers, partners.

**Fields Description:**

Name: Account name
Owner: the user who owns the record. This field is used by the Access Control System to control access to records based on their ownership.

**Contact Section**: contact information

Email: email address of the account:
Office Phone: the office phone number.
Website: the URL for the account's website.
Fax: the fax number for the account.

**Billing Address Section**: billing address

**Shipping Address Section**: shipping address.

Copy Billing Address: copy the Billing Address to the Shipping Address section.

**Other Information Section**:

Type: account category.
Industry: the industrial sector to which the account belongs.
Annual Revenue: Enter the annual revenue for the account.
SIC Code: the Standard Industrial Classification code that indicates the account's type

of business.
Ticker Symbol: the stock ticker symbol of the account.
Manager: the manager of the account.
Ownership: the owner information of the account.
Rating: the account's rating in the industry
Number of Employees: the number of employees in the account.
Assigned to: the individual you want to assign to the account

## 2.3 Contact

Contact is any individual who is a valid sales lead; a lead that has been evaluated and assessed for a possible sales opportunity.

**Fields Description:**
Salutation: contact's salutation
First Name: contact's first name
Last Name: contact's last name.
Title: contact's business title
Department: the department that this contact belongs to
Account: the account associated with the contact
Owner: the user who owns the record. This field is used by the Access Control System to control access to records based on their ownership.

**Contact Section:**
Email: email address of the contact
Office Phone: the contact's office phone number.
Web Site: web site of the contact
Fax: the contact's fax number.
Mobile: the contact's mobile phone number.
Skype ID: skype ID.

**Primary Address Section**: primary address

**Other Address Section**: other address.
Copy Mailing Address: copy the Primary Address to the Other Address section.

**Other Information Section:**
Department: the department that the contact belongs to.
Reports To: the contact's supervisor
Lead Source: the source that generated the lead
Campaign: the campaign that associates with the contact.
Do Not Call: the flag to add the contact to the Do Not Call list. To ensure that the contact is not targeted during campaigns.
Assigned to: the individual who is responsible for communicating with this contact.

## 2.4 Opportunity

Opportunity signals the kickoff of your company's sales process with a potential or existing client. specifies the estimated amount of a sales deal and is tied to a sales stage.

**Fields Description:**

Name: opportunity name

Account: the account associated with the opportunity

Owner: the user who owns the record. This field is used by the Access Control System to control access to records based on their ownership.

Currency: currency used for this opportunity

Expected Close Date: the expected or estimated close date for this particular opportunity.

Opportunity Amount: Enter the estimated amount of the sale.

Type: opportunity type

Sales Stage. the current status of this opportunity. The following is the available stages:

> **Prospecting**. This is the first stage in the sales process and indicates that the opportunity with this prospect is new and needs to be qualified by a sales representative.
>
> **Qualification**. The sales representative is currently interacting with the prospect to determine if a sales opportunity exists.
>
> **Needs Analysis**. The sales representative uncovers the prospect's business problems (having determined that the prospect is interested in the products or services).
>
> **Value Proposition**. The sales representative maps the company's products and/or services to the prospect's business problems and describes the value of the solution (having uncovered the prospect's business problems).
>
> **Id. Decision Makers**. The sales representative identifies the decision makers necessary to close this opportunity (having determined that there is a match between the prospect's business problems and the company's products and/or services).
>
> **Perception Analysis**. The sales representative analyzes the prospect's perceived value of the company's solution to prepare the appropriate combination of products and services for a sales quote.
>
> **Proposal/Price Quote**. The sales representative delivers the proposal or price quote to the prospect.
>
> **Negotiation/Review**. The sales representative reviews and negotiates the proposal with the prospect.
>
> **Closed Won**. The sales representative has won this opportunity and the company can now bill the customer.
>
> **Closed Lost**. The sales representative has lost this opportunity.

Lead Source: the lead source

Probability (%): probability of this opportunity.

Campaign: the campaign that this opportunity is related to .

Next Step: the next step in closing a sale.

Assigned to: the individual you want to assign to the record.

## 2.5 Lead

Leads are early contacts in the sales process. Leads should be qualified as a potential customer before they are "promoted" to a Contact and/or Opportunity.

### Fields Description:

Salutation: lead's salutation.
First Name: lead's first name
Last Name: lead's last name.
Company: the company that this lead belongs to
Title: lead's business title
Owner: the user who owns the record. This field is used by the Access Control System to control access to records based on their ownership.

**Contact Section:**
Email: email address of the lead
Office Phone: the lead's office phone number.
Fax: the lead's fax number.
Mobile: the lead's mobile phone number.

**Primary Address Section**: primary address

**Shipping Address Section**: shipping address.
Copy Primary Address: copy the Primary Address to the Shipping Address section.

**Other Information Section:**
Department: the department that this lead belongs to.
Account: the account associated with the lead.
Status: lead status. Standard status options are listed below. The administrator can change these to suit your organization's requirements:

- New: Unassigned, new lead.
- Assigned: Newly assigned to user.
- In Process: Currently active.
- Converted: The status appears as converted after the Convert Lead link has been selected. The system automatically changes the status in this field.
- Recycled: No opportunity at this time, lead should recycle to marketing for future follow-up.
- Dead: No opportunity and/or bad data

Status Description: status description.
Lead Source: the source that generated the lead
Lead Source Description: lead source description
Opportunity Amount: Estimated amount of the sale.
Referred by: relevant information in this field if someone referred the lead to you.
Campaign: the campaign that associates with the lead.

Do Not Call: the flag to add the lead to the Do Not Call list. To ensure that the lead is not targeted during campaigns.
Assigned to: the individual who is responsible for communicating with this lead.

## 2.6 Campaign

Campaign management allows you to manage your entire marketing process by which marketing campaigns are planned, produced, distributed and analyzed.

**Fields Description:**

Name: the campaign name.
Status: the current status of the campaign
Owner: the user who owns the record. This field is used by the Access Control System to control access to records based on their ownership.

Start Date: the date on which the campaign begins.
End Date: the date on which the campaign ends.
Type: the campaign type such as email or trade show.
Currency: the currency used to calculate the budget, cost, and revenue.
Impressions: the number of page impressions generated from the campaign. You will need to fill in this field after the campaign has commenced.
Budget: the budget for the campaign.
Expected Cost: the estimated cost of the campaign.
Actual Cost: the actual cost incurred to conduct the campaign.
Expected Revenue: the estimated revenue from the campaign.
Assigned to: the user assigned to the campaign
Objective: the goal of the campaign.

## 2.7 Case

Case is used to track and manage services-related problems reported by your users and customers.

**Fields Description:**

Subject: brief statement of the problem.
Owner: the user who owns the record. This field is used by the Access Control System to control access to records based on their ownership.

Priority: specify the urgency of the problem
Status: specify the current status of the problem, such as New or Closed
Account: associated account
Case Type: categorize the case.
Case Origin: origin of case
Case Reason: case reason
Resolution: results of the investigation into the problem.
Assigned to: the individual you want to assign to the record

## 2.8 Call

Call is used to manage the calls.

**Fields Description:**

Subject: the subject of discussion.
Direction: the direction of call.
Owner: the user who owns the record. This field is used by the Access Control System to control access to records based on their ownership.

Status: the status of call.
Start Date & Time. The start date & time of call
Related Object: related object
Related Record: related record.
Reminder: Reminder way, will send reminder email to all participants.
Assigned to: specify the user who is assigned to the record

**Button Description:**
Send Invites: Sends invitation mail to all participants.

## 2.9 Meeting

Meeting module is used to manage the meetings.

**Fields Description:**

Subject: the subject of meeting.
Status: the status of meeting.
Start Date: the start date & time of meeting
End Date: the end date & time of meeting.
Related Object: related object
Related Record: related record.
Reminders: Reminder way, will send reminder email to all participants.
Location: meeting location.
Assigned to: specify the user who is assigned to the record

**Button Description:**
Send Invites: Sends invitation mail to all participants.

## 2.10 Task

Task module is used to schedule and manage tasks.

**Fields Description:**

Subject: the subject of task.
Status: the current status of task.
Start Date: the start date & time of task
Due Date: the completion date & time of task.

Related Object: related object
Related Record: related record.
Contact: an individual from the Contacts list. Typically, this is the contact for the specified account.
Priority: reflects the importance of completing the task
Assigned to: specify the user who is assigned to the record

## 2.11 Document

Document module is used to create and manage files that you share with users and contacts.

**Fields Description:**

Name: document name
File: used to upload file and show file name.
Status: the status to indicate the current state of the document such as Draft or Under Review.
Revision: the revision number if you revised this document.
Publish Date: the date when the document is published for other users to view and download it.
Expiration Date: the date when the validity of the document expires. For example, collateral for a sales campaign may not be useful after the campaign ends.

Category: document category
Sub Category: document sub category
Related Document:. associate a related document.
Assigned to: specify the user who is assigned to the record

## 2.12 Target

Targets Module is used to track and manage targets as part of mass marketing campaigns.

**Fields Description:**
First Name: target’s first name
Last Name: target’s last name.
Title: target’s business title
Department: the department that this target belongs to
Account: the account associated with the target

**Contact Section:**
Email: email address of the target
Office Phone: the target’s office phone number.
Fax: the target’s fax number.
Mobile: the target’s mobile phone number.

**Primary Address Section**: primary address

**Shipping Address Section**: shipping address.
Copy Primary Address: copy the Primary Address to the Shipping Address section.

**Other Information Section:**
Do Not Call: the flag to add the target to the Do Not Call list. To ensure that the target is not targeted during campaigns.
Assigned to: the individual who is responsible for communicating with this target.

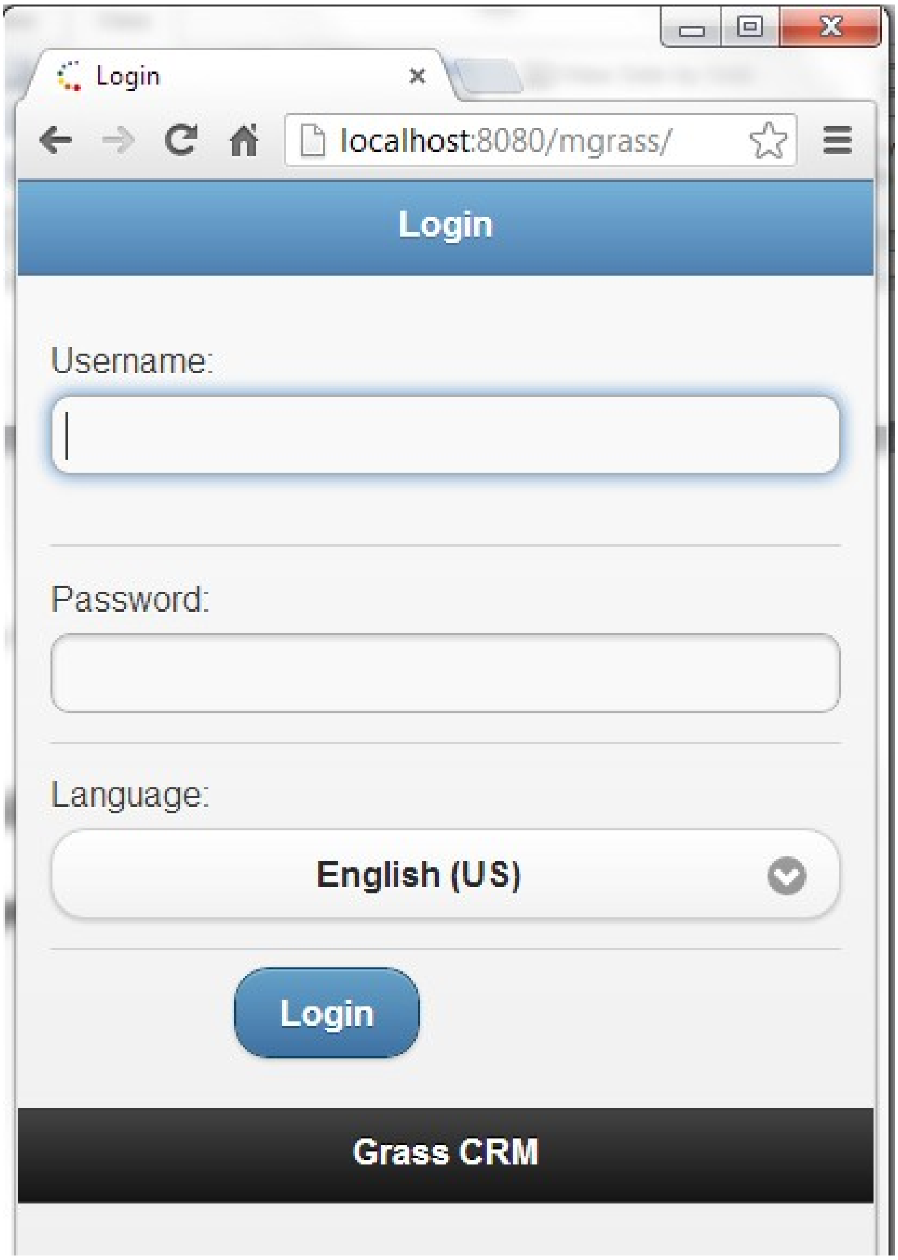
## 2.13 Target List

Targets List Module is used to track and manage mass marketing campaigns. You can add multiple accounts, contacts, leads, targets, users to a target list, in the campaign page, you can add target lists for this campaign, when send Invitations, will send invitation mail to the accounts, contacts, leads, targets, users included in the target list.

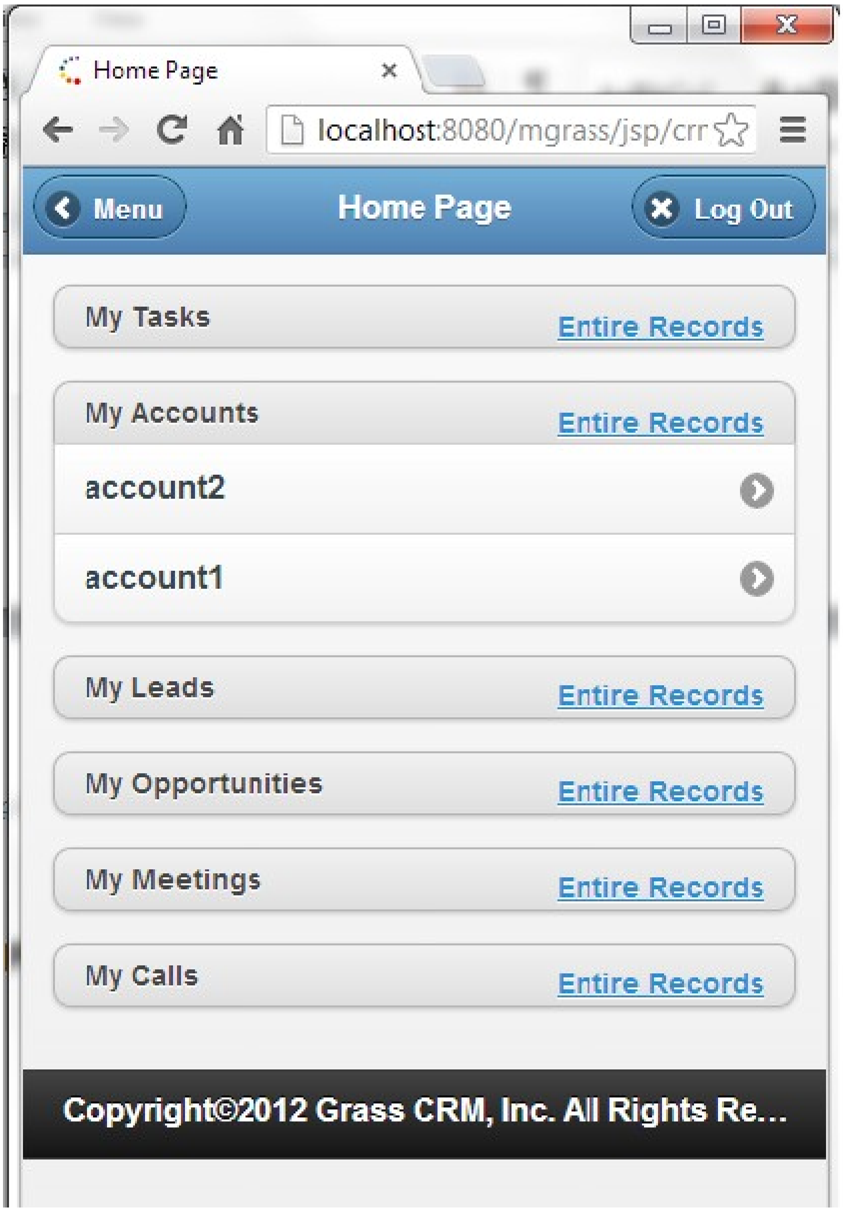
**Fields Description:**
Name: target list name
Assigned to: specify the user who is assigned to the record

# 3. Mobile Grass CRM System Function

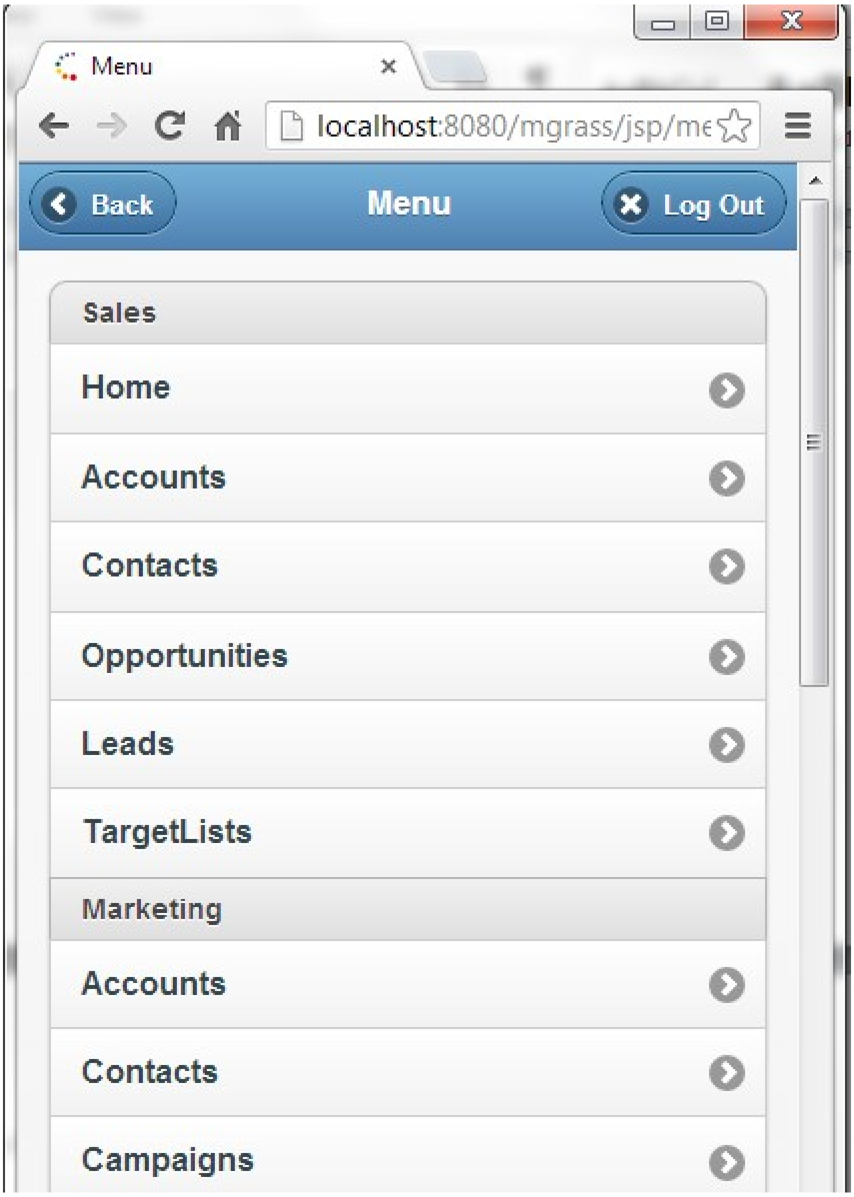
## 3.1 Login Page



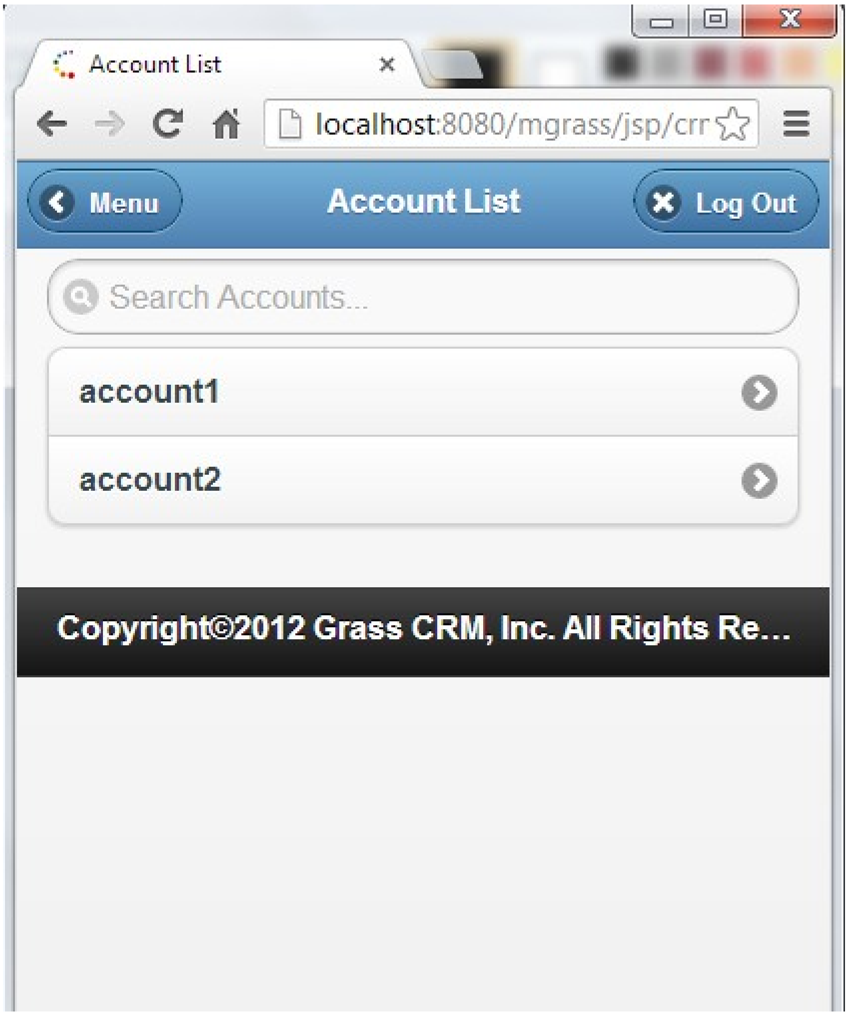
## 3.2 Home Page


Home Page
localhost:8080/mgrass/jsp/crr
Menu
Home Page
Log Out
My Tasks
Entire Records
My Accounts
Entire Records
account2
account1
My Leads
Entire Records
My Opportunities
Entire Records
My Meetings
Entire Records
My Calls
Entire Records
Copyright©2012 Grass CRM, Inc. All Rights Re...

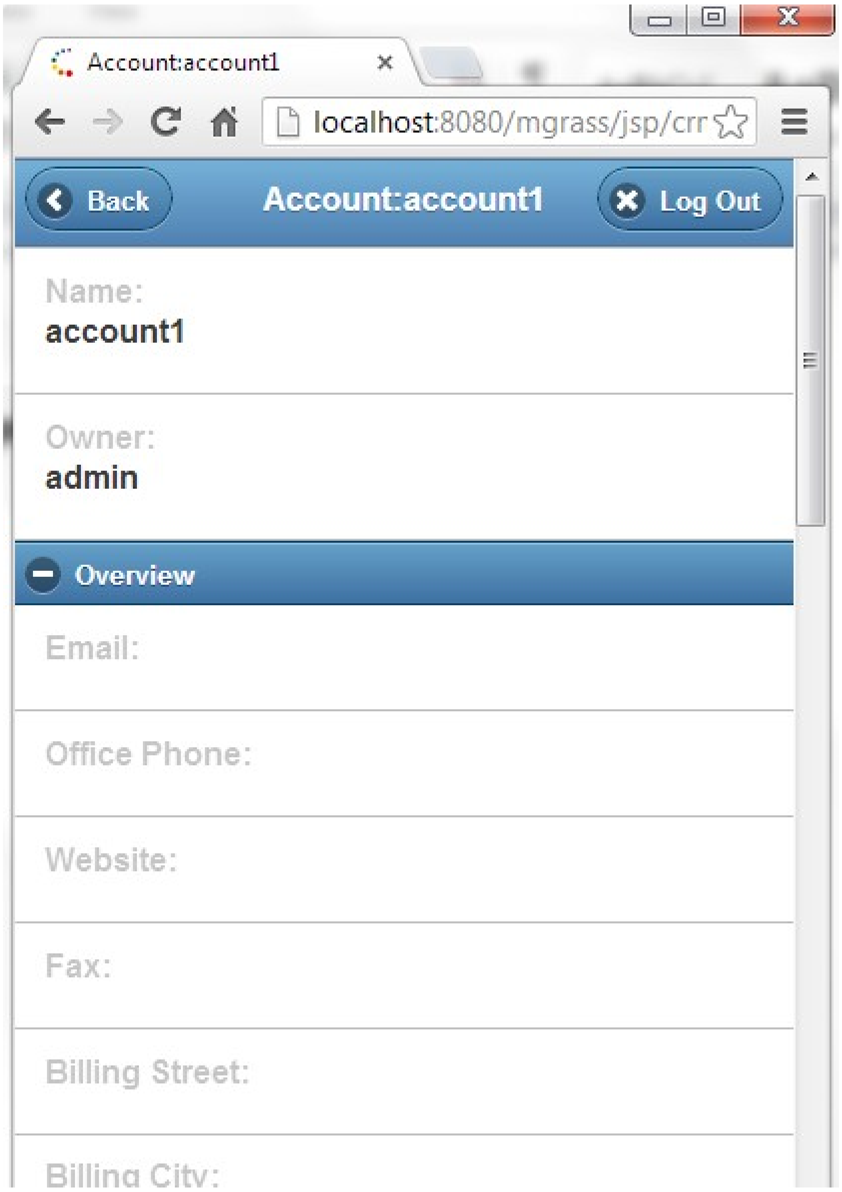
### 3.3 Menu Page


Menu
localhost:8080/mgrass/jsp/me
Back
Menu
Log Out
Sales
Home
Accounts
Contacts
Opportunities
Leads
TargetLists
Marketing
Accounts
Contacts
Campaigns

## 3.4 List Page


Account List
localhost:8080/mgrass/jsp/crr
Menu
Account List
Log Out
Search Accounts...
account1
account2
Copyright©2012 Grass CRM, Inc. All Rights Re...

## 3.5 Detail Page



# 3. Configuration

How to configure the environment:

(1)Download and install Postgres database, the download URL:http://www.postgresql.org/download/

(2)Download and install Jboss Server Version 6.1.0 Final version, the download URL:http://download.jboss.org/jbossas/6.1/jboss-as-distribution-6.1.0.Final.zip

(3)Download and install Eclipse, then import the Grass CRM project

(4)Config the build.xml, in line 19, change the value of propery "jboos.deploy" to your jboss sever location

(5)Config the datasource in Grass/WebContent/WEB-INF/config/spring/applicationContext.xml, in line 16, if postgres database is installed in other server, you can change the value of url here.

(6)Initialize database(only need be done at the first time):

a. Create a new database "grass", the script is as following, you also can create it in pgAdmin tool. CREATE DATABASE grass WITH OWNER = postgres ENCODING = 'UTF8' TABLESPACE = pg_default LC_COLLATE = 'English, United States' LC_CTYPE = 'English, United States' CONNECTION LIMIT = -1;

b. Switch current database to grass, then execute the sql script in Grass/sql/InitializeData.sql

(7)In eclipse, go to Grass project, execute "ant deploy" to deploy project to jboss server, then start jboss server. (8)In browser, input URL:localhost:8080/grass, will open the login page, the default user name is "admin", password is empty, then you can login the Grass CRM system.

How to deploy grass crm to tomcat:

If you want to deploy grass crm to Tomcat, you need add jta.jar to this project, you can download jta.jar fromhttp://www.java2s.com/Code/Jar/j/Downloadjtajar.htm, if you deploy grass crm to Jboss, needn't this jar.