



# **Administration Manual**

## Using Your Documentation

The following documentation is included with Relata to help you effectively use the product. Please read and use the manual according to your requirements.

### Administrator's Manual

This manual offers detailed information on using Relata. Read this manual to understand how the various components of Relata work and to also get a better understanding of how this application can suit your needs.

Refer to this manual should you have any problems using Relata.

### System Requirements

The following are requirements for Relata:

- ?? Current browser: Internet Explorer 5.0 or better; Mozilla 0.9.6 or better; cookies enabled
- ?? Web server: Apache 1.3.12 or better; MS Internet Information Server 4.0
- ?? PHP: 4.0.x; 4.1.x recommended
- ?? Database server: MySQL 3.23.x, PostgreSQL 7.0.x or 7.1.x
- ?? OS: Linux 2.2.x or better; MS Windows NT/2000/XP, MacOS X

### Contents of This Manual

This manual describes how the administrative component of Relata works. To get the most out of Relata, please read this manual carefully before using Relata.

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## Chapter 1 Introduction

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Relata is a CRM platform that currently features a sales force automation module, with additional CRM modules currently being developed. Relata has user and administrative interfaces. Being web-based, the interface for Relata is a current version of a standard web-browser.

The Relata source code is released under the GPL, and makes use of the programming languages PHP and Javascript. We have chosen to use Javascript and PHP because our development team believes in making our source code accessible to as broad an audience as possible. Both Javascript and PHP have a rapidly growing developer base because of their ease of use.

We have made Relata completely web-based in order that it may be run without having to install special client software – something of specific value to IT managers who want to deploy Relata in an organization with many users.

Relata allows you to manage your contacts and accounts from one integrated web interface. Sales professionals can use Relata to organize and manage their customers and accounts with ease and powerful functionality.

Relata is highly scalable and is appropriate for use in the enterprise.

Relata can be customized to run with any SQL database.

Using Relata, you have the power to create custom fields, manage sales opportunities, associate your contacts with various categories (groups) – e.g. 'Computer Salespeople'. By adding this functionality, Relata allows you to perform rapid queries on key variables, communicating with your contacts in a more targeted and efficient capacity. You can send email to your specific groups simultaneously with important information - saving you from emailing each contact individually.

Relata allows you to track responses to outgoing emails, should you decide to conduct an email marketing campaign.

Relata also records and tracks all your communications with your contacts, giving you a more precise history of each relationship, allowing you to extract more information and value from your database.

With built-in support for opportunities, users are able to avoid losing out on potential sales. Easily associate a particular contact with an opportunity using point-and-click functionality. You can keep track of the various sales stages associated with a sale and the probability of a sale with ease.

Relata also allows you to better organize and prioritize your short-term and long-term activities using the to-do and calendar features. You can plan ahead with Relata: enter events or to-do items ahead of time and print out your daily to-do schedule and calendar whenever you require it.

Relata is free.

We hope you enjoy Relata as much as we did creating it.

?? Team Stratabase

## Chapter 2

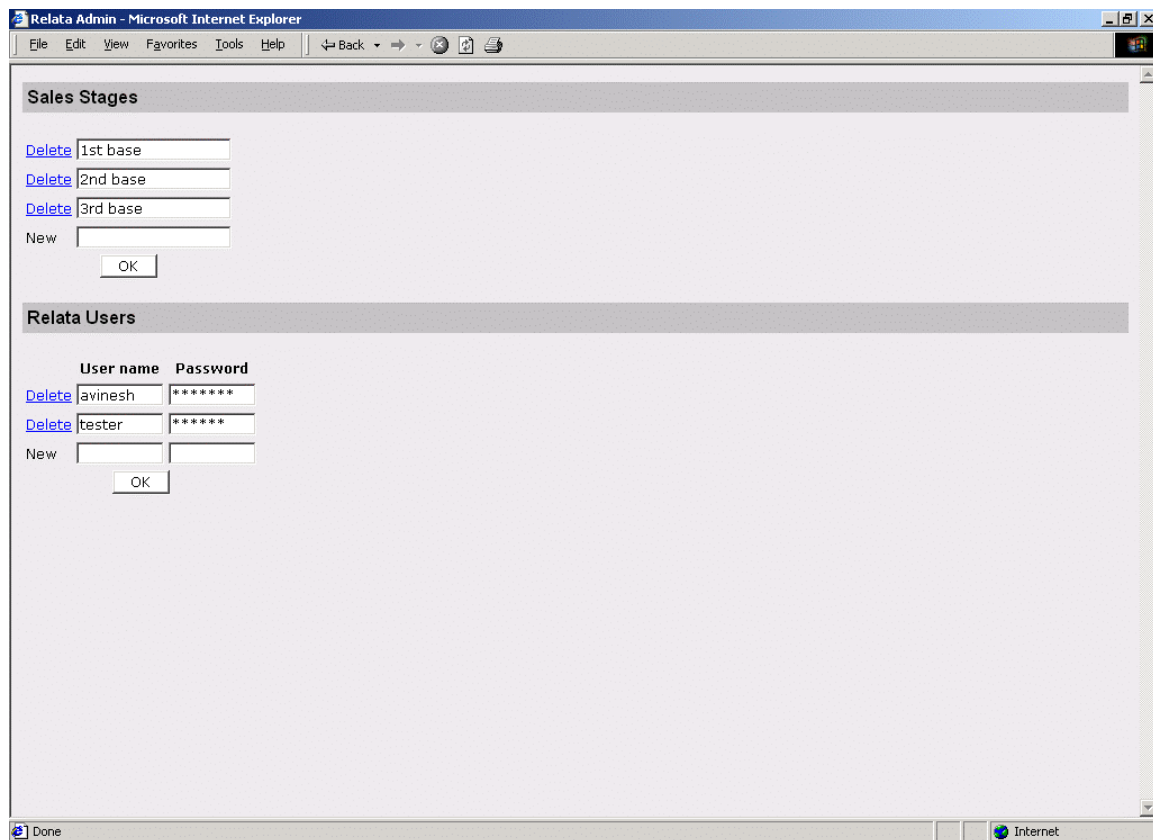
# Relata Administration

This chapter of the manual explains how to administer Relata. Please read this part of the manual if you are new to Relata, reading it will help you become familiar with the different features this product offers. This section assumes that Relata has been successfully installed and configured on the server.

It is recommended that the administrative component of Relata is stored in a password-protected directory for security purposes. For example, with Apache, use a .htaccess file to protect a directory.

### 2.1 Administrative Interface

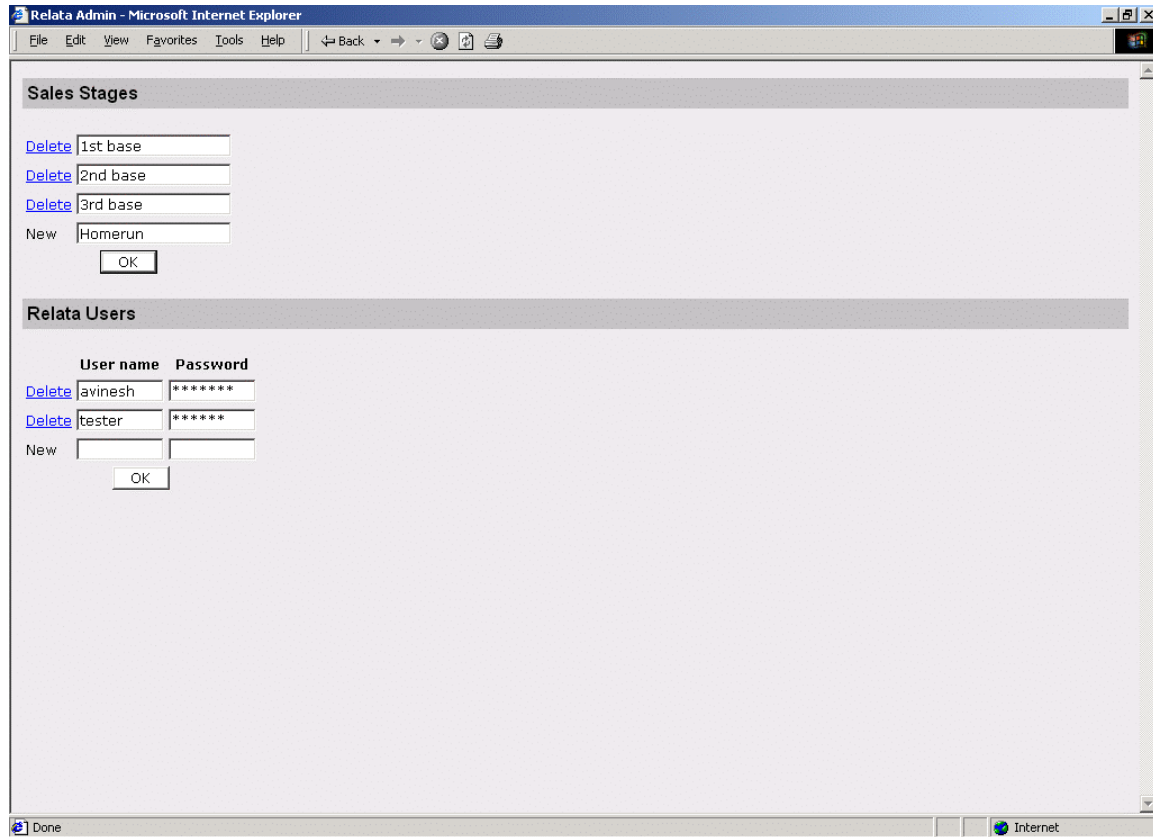
Upon accessing the Relata administrative interface, you will be presented with the following screen:



In the screenshot above, note that there are three sales stages and also two logins already set up for Relata.

## 2.2 Adding a Sales Stage

In order to add a new sales stage, enter a new sales stage into the text field beside 'New' and then click 'OK'.



The screenshot shows a web browser window titled "Relata Admin - Microsoft Internet Explorer". The browser's address bar is empty, and the menu bar includes File, Edit, View, Favorites, Tools, and Help. The main content area is divided into two sections: "Sales Stages" and "Relata Users".

**Sales Stages**

Delete	1st base
Delete	2nd base
Delete	3rd base
New	Homerun

OK

**Relata Users**

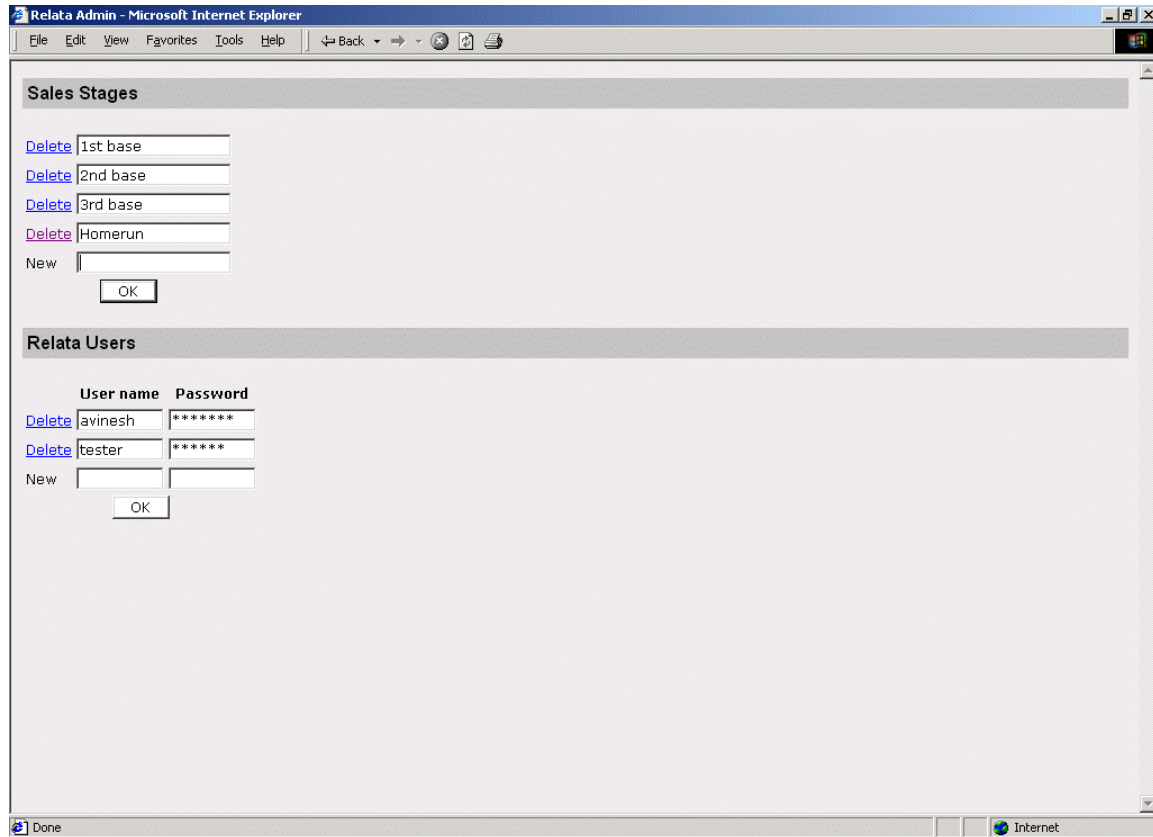
	User name	Password
Delete	javinesh	*****
Delete	tester	*****
New		

OK

In the screenshot above, a new sales stage entitled 'Homerun' has been entered into the text field. Simply click on 'OK' to save the new sales stage. Keep in mind that these sales stages are global and accessible to all Relata users.

## 2.3 Deleting a Sales Stage

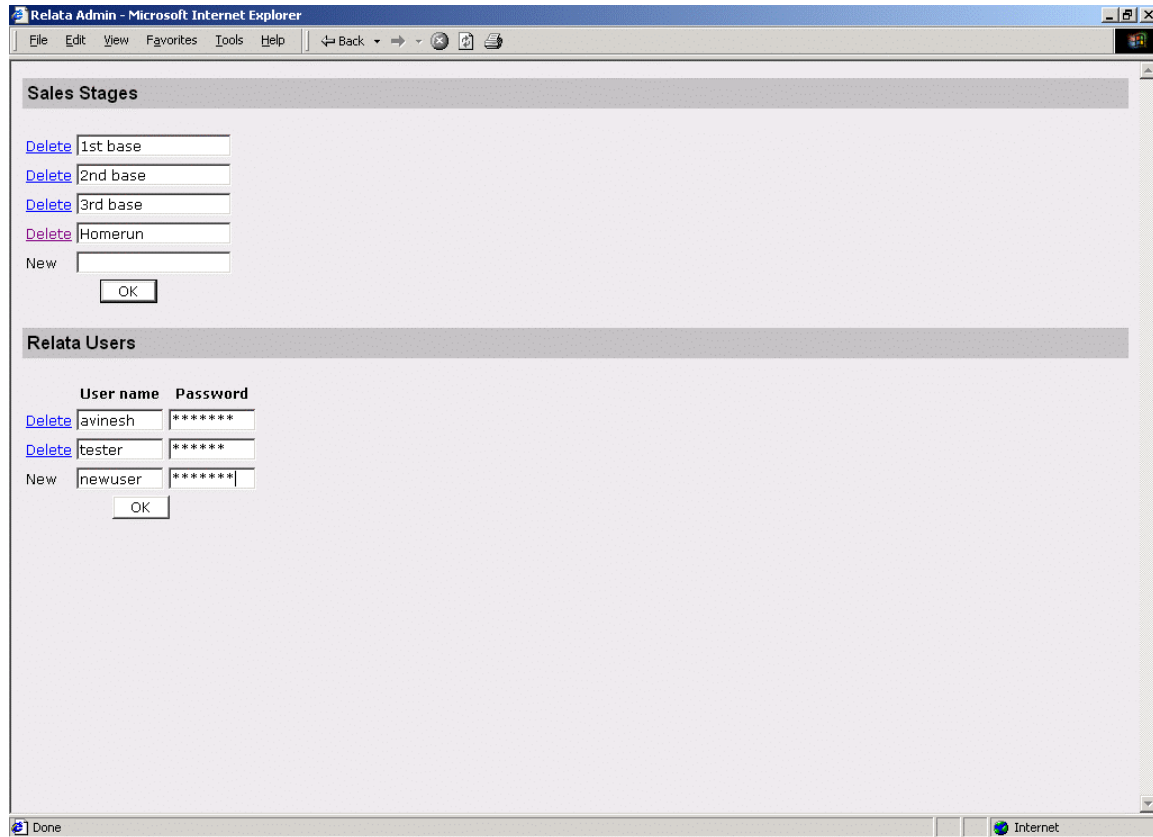
In order to delete a sales stage, simply click the 'Delete' hyperlink to the left of the sales stage that you wish to delete:





## 2.4 Adding a Relata User

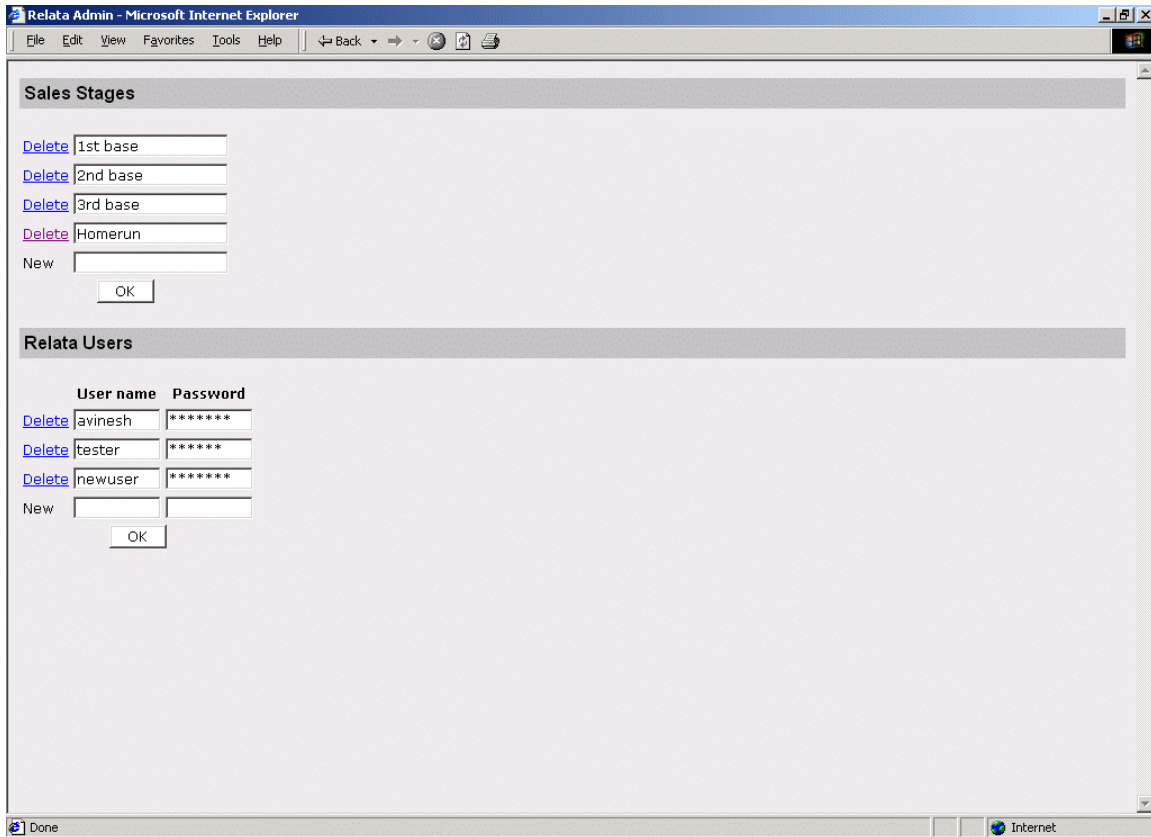
To enter a new user, fill in the 'User name' and 'Password' text fields to the right of the 'New' text label:



In the screenshot above, a new user with an username of 'newuser' and a password of 'newuser' (masked with \*'s) has been entered. Simply click 'OK' to save the new Relata user account.

## 2.5 Deleting a Relata User

In order to delete a Relata user, simply click the 'Delete' hyperlink to the left of the Relata user stage that you wish to delete:



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## GLOSSARY

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Term	Definition
AOL	America Online. A national internet service provider who offers their customers a special interface that must be used in order to use their services, including email
CRM	An acronym for Customer Relationship Management
Database	A logical entity that stores vast amounts of data on a physical mechanism such as a hard drive
ISP	An acronym for Internet Service Provider. Provides Internet service to residents of a municipality, at a fixed or variable monthly cost
Javascript	A web-based scripting language that can be used to interact with HTML components. It does not have all the power of Java, but is designed with a more secure model in mind
MySQL	An open-source relational database management system suitable for small to medium databases. <a href="http://www.mysql.com">http://www.mysql.com</a>
Open-source	Term used to refer to projects released under the General Public License (GPL) that come with source code. They are freely available and may be modifiable in respect to the terms laid out in the GPL. Typically Linux based projects
Pane	Used to refer to either the left or right window in a split window frame
PHP	A free scripting web scripting language for Linux and Win32, with a rapidly growing user base. It is scalable and fast.
PostgreSQL	A scalable open-source object-relational database management system that utilizes SQL. <a href="http://www.postgresql.org">http://www.postgresql.org</a>

Sendmail	An open-source mail server that was used when developing Relata. You may download it from <a href="http://www.sendmail.org">http://www.sendmail.org</a>
Server	A logical entity running on a computer that serves or stores data for users
Variable	A logical entity that stores data usually temporarily