XRMS Open Source CRM

User Manual

Version 3

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Version 3

• Added Plugin Information

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Overview

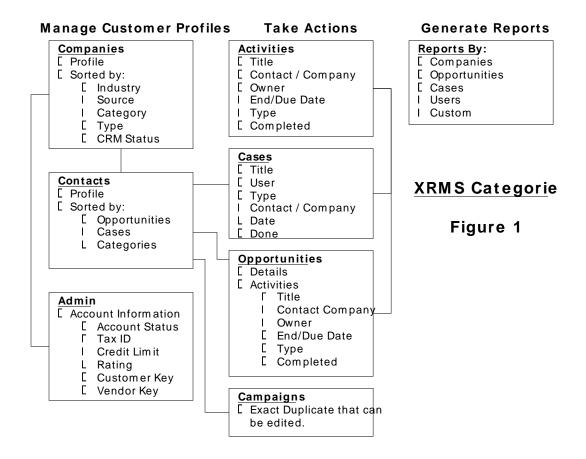
XRMS is a fully-integrated suite web-based Customer Relationship Management (CRM), Sales Force Automation (SFA), and business intelligence (BI) tools, allowing companies to integrate and manage their sales, service, and marketing data into a single information store.

XRMS provides the ability to:

- Manage client Companies;
- Contacts within a company;
- Initiate and manage marketing Campaigns;
- Initiate and manage Cases, Opportunities and Activities related to Companies and Contact;
- Upload files to Campaigns or Cases;
- Generate activity reports; and
- Customize and administer the environment.

XRMS is a web application. Installation of XRMS requires Apache, PHP and MySQL. XRMS runs on many different servers including Windows, Linux, UNIX, MacOSX and BSD environment.

Description of Components



XRMS is arranged in three major categories:

- 1. Management of Customer Profiles.
- 2. Take action on activities. Activity types include Activities, Cases, Opportunities and Campaigns.
- 3. Generate reports. Reports can be generated by Companies, Opportunities, Cases, Users and Custom.

Manage Customer Profiles (Companies and Contacts)

Customers consist of a Company, and Contacts within that Company.

Illustration 1 - Company



Illustration 2 - Contact



XRMS displays your customers as Companies and Contacts. Company information (Illustration 1) includes the company name, address, telephone, fax, credit worthiness, relationship to other vendors and other information about your company client. Company has eight buttons (Illustration 3) to add, delete or modify information.

Illustration 3 – Company Configuration Buttons



<u>Edit</u> – Modify the core of the Company information such as the Company name, CRM Status, telephone numbers, URL, etc.

<u>Admin</u> – Modify issues related to credit worthiness such as account status, federal tax ID, credit limit, rating, etc.

<u>Clone</u> – Exact copy of the current company. For use when one client has multiple entities providing different services from the same location, under different names.

<u>Mail Merge</u> – Send emails to the Contacts of this Company using the standard template, or your newly designed template.

<u>News</u> – Google News search for this Company.

<u>Relationships</u> – List associations of this Company to other Companies. Typical examples are that this company is a consultant, supplier for, or subsidiary for another Company. For each XRMS relationship there is an equal, opposite relationship. For example, if this Company shows a relationship of "retains consultant," the other Company will show a relationship of "Consultant for."

<u>Addresses</u> – Create and modify addresses for each Company location. Each Company can have an unlimited number of addresses. After Addresses are configured,

<u>Divisions</u> – List and create Divisions for each Company.

Contact information (Illustration 2) lists information about the people that work for the Company. All Contacts are associated with a Company. Contacts cannot exist outside of a Company. The detailed information for Contacts includes the name, address, telephone, fax, title, division and other relevant information.

Lead Management

XRMS provides for several types of actions related to a Contact or Company which include:

- Activities are actions of a user such as a telephone call or email to a Contact. All Activities are related to a Company or Contact. Activities may also be related to Cases, Opportunities and Campaigns. . Activities include making telephone calls, sending emails or letters or having meetings. Activities can be related to a Contact, Company, Opportunity or Case.
- 2. <u>Cases</u> are used for support issues for a client.
- 3. Cases must be associated with a Company and a Contact within a Company. If no Contact is selected the Company default Contact is assumed. Activities can be initiated related to Cases.
- 4. Opportunities which are typically sales related Opportunities must be related to a Company and a Contact within a Company. If no Contact is selected the Company default Contact is assumed. . Activities can be initiated related to Opportunities.
- 5. <u>Campaigns</u> which are typically marketing related like a mailing to Companies /Contacts where a fixed length of time and a fixed budget. Opportunities can be associated to a specific Campaign.

Starts and Ends dates for activities are in days. Either the popup calendar can be used to select Starts and Ends or a user can type in the number of days to Starts or Ends. XRMS will interpret the users input and calculate the correct date. Examples of free form dates that can be entered are:

- 10 (means 10 days)
- 10 days
- 2 weeks

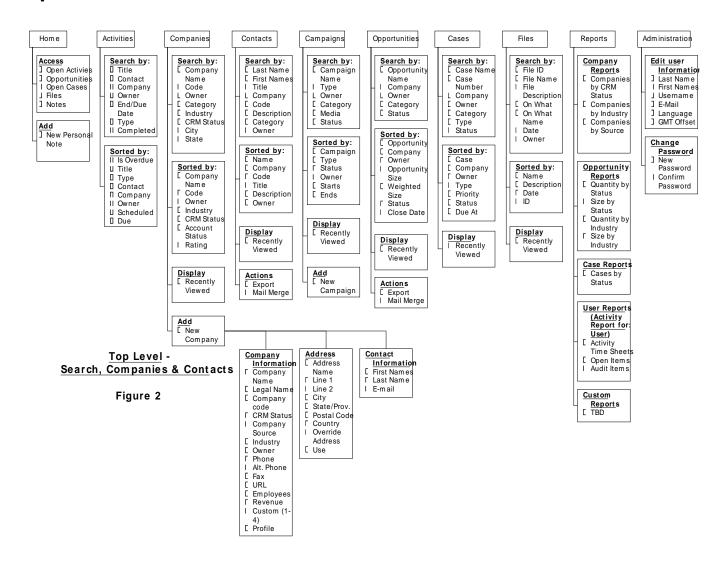
- 1 month
- 1 year
- next Tuesday (in newer versions of PHP)

Generate Reports

XRMS provides to generate reports by:

- 1. Companies
- 2. Opportunities
- 3. Cases
- 4. Users
- 5. Custom

Top Level Windows



The top tabs to the windows mainly provide the ability to search for a Companies, Contacts, Opportunities, Cases, Files, Reports. All searches can contain multiple criteria and are exclusively or'ed. The Administration tab provides the ability to customize the various components of XRMS if administrative rights have be granted to the user. If not, the user can only change their profile.

All additions to Companies Contacts and Cases must to done under the Companies tab. Campaigns can be added under the Campaign tab since they are not related to a specific Company.

Home

The Home window provides easy access to a users:

- Opportunities
- Open Cases
- Files

Notes

The user can access any of the above by clicking on it.

Activities

The Activities window provides the ability to search for Activities by Title, Contact, Company, Owner, End/Due Date, Type or Completed.

Activities can be sorted by Is Overdue, Title, Type, Contact, Company, Owner, Scheduled or Due.

Activities can be independent of Companies / Contacts or associated with Companies / Contacts, Opportunities or Cases.

Companies

The Companies window provides the ability to:

- Search for a company based on variety of search options; Name, Code, Owner, Category, Industry, CRM Status, City, State. The search results are displayed in the same window.
- Add new company.
- Easy access to Recently Viewed companies.

The resulting search list can be sorted by Company Name, Code, Owner, Industry CRM Status, Rating.

Contacts

The Contacts window provides the ability to:

Search by Last Name, First Names, Title, Company, Code, Description, Category, Owner.

The resulting search can be sorted by Name, Company, Code, Title, Description, Owner.

Recently viewed Contacts are also displayed in this windows.

New Contacts can only be entered under the Companies window by selecting or adding a company and then by adding the Contacts under that company. The system is driven by Companies not Contacts.

Campaigns

The Campaign window provides the ability to:

- Add new campaigns.
- Search for existing campaigns by Campaign Name. Type, Owner, Category, Media, Status.

Recently viewed campaigns are also displayed.

Opportunities

The Opportunities window provides the ability to:

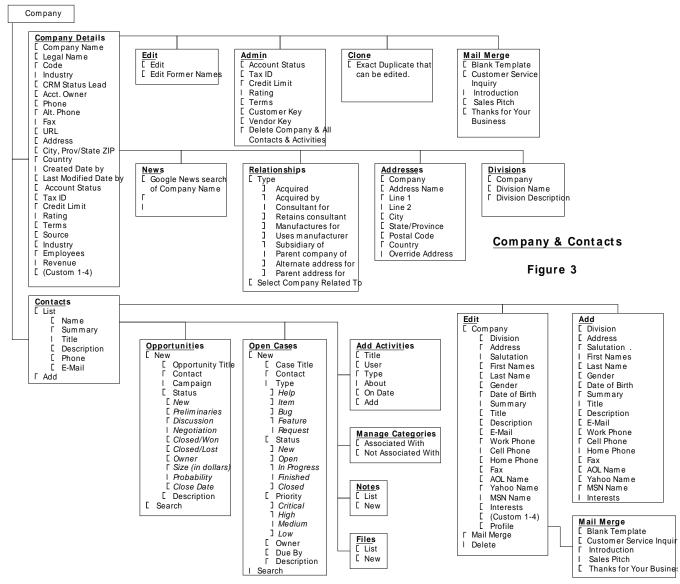
- Search by Opportunity Name, Company, Owner, Category, Status.
- Export the Opportunities into an spreadsheet.
- Create a mail merge from a template. The templates available are a Blank Template, Customer Service Inquiry, Introduction, Sales Pitch or Thanks for Your Business.

Resulting searches can be sorted by Opportunity, Company, Owner, Opportunity Size, Weighted Size, Status, Close Date.

Recently viewed Opportunities are also displayed.

Opportunities can only be added under the Company window.

Company and Contacts



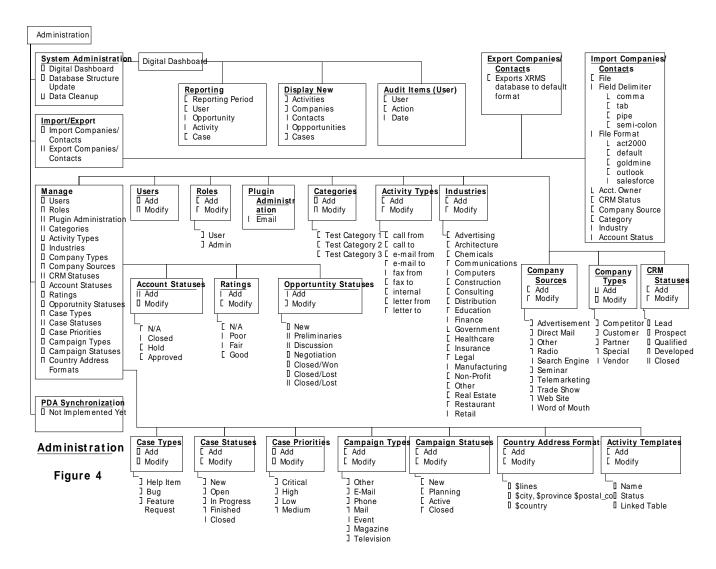
All data management of the Company, Contacts, Opportunities, Cases, Activities, Categories, Notes and Files can be accessed from the Company & Contacts section. This includes editing, deleting, adding or modifying information.

Remember, Contacts are always related to Companies. A Company must to be added to add any Contacts.

Opportunities, Cases, Activities can be added or edited under Contacts for a specific Company. Notes and Files can also be added and attached to Contacts and Companies.

An email can be sent to a Contact with the Mail Merge feature. Boilerplate emails are provided or a Blank Template can be used.

Administration



System Administration

System Administration consists of:

- Digital Dashboard:
 - o Provides various reports by User, Opportunity, Activity and Case.
 - o Displays new Activities, Companies, Contacts, Opportunities and Cases.
 - Displays Audit Reports of Users.
- Database Structure Update which updates the database structure.
- Database Cleanup which cleans up the database.

Data Management

XRMS provides the ability to import and export data into the XRMS database.

Import Companies/Contacts

Imports data from a delimited form, comma, tab, pipe or semi-colon. File structures supported are act2000, goldmine, salesforce, outlook or the default format of XRMS. The default format is defined in the Appendix 2 - Default Import Format.

Imported data is imported with the following criteria:

- Acct. Owner
- CRM Status
- Company Source
- Category
- Industry
- Account Status
- Rating

Unless specified, the import of data assigns the default country to be the USA if there is no country indicated in the country field associated with that Company. To change the default country, see Appendix 1 - Country Code List.

The default Gender is male.

The imported data is first displayed so the user can preview the data. You will notice that only one Company record is put into XRMS with the Contacts of each Company related to the Company record.

Once the data is previewed it can be submitted to the XRMS database.

Export Companies/Contacts

Export provides the ability to export all data in the XRMS database to a delimited file. It is exported in the default format.

User Setup

Users can be added to XRMS and granted access or turned off.

Roles can be added or modified. The default Roles are:

- Admin, which provides access to the Administration functions;
- User which does not have Administration functions.

Additional Roles can be added.

Setup

Before starting with XRMS, the various defaults should be reviewed and edited appropriately. The following can be modified, added to or deleted. Once deleted, the action cannot be reversed so be careful, all associations with Companies, Contacts, Cases and Campaigns will be lost.

- Categories,
- Activity Types,
- Industries,
- Company Types,
- CRM Statuses,
- Account Statuses,
- Ratings,
- Opportunity Statuses,
- Case Types,
- Case Statuses,
- Case Priorities,
- Campaign Types,
- Campaign Statuses,
- Country Address Formats,

The defaults provide a basic example of the function of each. There is no limit on the number of items that can added under each group.

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Contacts 6
Divisions 7
Edit 6
Mail Merge 6

News 6

Relationships 7

Plugins

Here is a list of the plugins available in XRMS and what they provide. Plugins provide a convenient and easy way to link other applications into XRMS. Plugins are activated in the Administration Panel and some require installation of other programs or components.

Plugin Name	Activation	Stable	Description
apb	Requires installation of apb.	No ¹	Active PHP Bookmarks provides a function for users to bookmark websites and share these bookmarks.
autostatus	Requires installation of Autostatus.	??	Provides status of servers and network devices. This is good to provide a quick status report for users of the critical systems that would impact their operations.
censusfactsheet	Administration Panel only.	Yes	Queries US census website with address information of Contact information.
cti	Installation required.	??	Connection to the Asterisk Open Source PBX http://www.asterisk.org/ voicemail system.
demo	Administration Panel and addition of a webpage demo.php	Yes	Provides a link to a demo page within XRMS. The demo page would have to be provided.
dunfinder	Installation required.	Yes	Dial Up Number Finder for the US.
googlenews	Administration Panel only.	??	Provides an automatic link that passes the company name to search google news.
info	Installation required.	No	Additional tables to track characteristics of computers.
mapquest	Administration Panel only.	Yes	Passes address to mapguest.com to provide an address lookup. Cannot have both whereis and mapquest activated at the same time.

¹ Potential security risk since uses register_globals=On

Plugin Name	Activation	Stable	Description	
mrtg	Installation required.	???	Multi Router Traffic Grapher	
opportunitynotes	Administration Panel only.	Yes	Adds the ability to add notes to an Opportunity.	
phone	Administration Panel	??	Search for phone numbers in Company or Contact.	
radtest	??	??	Uses freeradious.org to authenticate dialup users.	
serverinfo			Obsolete Plugin replaced by info plugin.	
sitewx	Requires installation and weather station hardware connection.	??	Weather station plugin to provide real-time as graphical weather information.	
useradmin	Administration Panel only.	No	User admin plugin - NOT RECOMMENDED SINCE CREATES A SECURITY RISK.	
vcard	Administration Panel only.	Yes	Creates a vcard of the Contact	
voicemail	Installation of voicemail system required.	??	Provides link to a voicemail web page.	
webcalendar	Requires installation of Webcalendar.	Yes	Link to Webcalendar - Webcalendar is a shared calendar application - very nice.	
webform	Installation required.	Yes	Creates a webform on your external website.	
whereis	Administration Panel only.	Yes	Same as mapquest but link to whereis.com.au - Australia Cannot have both whereis and mapquest activated at the same time.	

Plugin Name	Activation	Stable	Description	
Owl Integration	Installation of Owl	Yes	OWL is a document management system. This	
	required.		will add a link to the Owl application within	
			XRMS.	

Glossary

Term	Association	Description	
Account Status	Companies	Status of a Company's account - N/A, Closed, Hold, Approved.	
Activities	Activities	Any Activity with a Company - must include description, be assigned to a User, include a Type (call from, call to, e-mail from, e-mail to, fax from, fax to, internal, letter from, letter to), can be associated to a Contact within a Company, can be about a Case, has a start date. Can be completed (grey) or uncompleted (pink).	
Activity Time Sheet	Reports	List of Activities by User - lists Start and End Date, Duration, User Name, Company and Contact that Activity was for, link to Activity Detail.	
Activity Types	Activities	Call from, call to, e-mail from, e-mail to, fax from, fax to, internal, letter from, letter to.	
Administration	Administration	Administration of XRMS includes the ability customize fields, generate reports and add, modify and delete Users.	
Audit Items	Administration	Detailed Audit by user of all actions executed on the XRMS System.	
Campaign	Campaigns	Several related operations aimed at achieving a particular goal. Usually for a specified period of time. Usually not related to a specific Company.	
Campaign Status	Campaigns	New, Planning, Active or Closed.	
Campaign Types	Campaigns	E-Mail, Event, Magazine, Mail, Other, Phone, Television	
Case	Cases	An occurrence of something related to a specific Company. Case Type can be Help Item, Feature, Request. Case Types can be added an modified by the Administrator. Activities can be related to a specific Case.	
Case Priorities	Cases	Level of urgency - Critical, High, Low, Medium. Case Priorities b added and modified by the Administrator.	

Term	Association	Description
Case Status	Cases	New, Open, In Progress, Finished, Closed. Case Status be added and modified by the Administrator.
Category	Companies	A custom field that can be related to Contacts, Companies, Campaigns
	Contacts	and Cases. Categories can be added and modified by the Administrator.
Company	Companies	Any Company that is in the XRMS database. Contacts can only be
		associated to Companies. Companies can be associated with Cases and Activities.
Company Code	Companies	A unique code that can be assigned to a Company by any User.
Company Source	Companies	Source where the Company found your business - Advertisement, Direct Mail, Other, Radio, Search Engine, Seminar, Telemarketing, Trade Show, Web Site, Word of Mouth. Company Sources can be added and modified by the Administrator.
Company Types	Companies	Type of company - Competitor, Customer, Partner, Special, Vendor. Company Types can be added and modified by the Administrator.
Country Address Formats	Administration	Format that the address is displayed, varies from
Country Code	Companies	Code identifying the default country. See Country Code List.
Created Date	Companies Contacts	Date that a Company or Contact profile was created.
Credit Limit	Companies	Credit limit in XRMS. Can be entered and modified by any User.
CRM Status	Cases	Status of a Case - Lead, Prospect, Qualified, Developed, Closed. CRM Status can be added and modified by the Administrator.
Customer Key	Companies	Unique number that is related to a Company. Can be modified or entered by any User

Term	Association	Description	
Digital Dashboard	Reports	Overview screen for Administrators that provides access Reports and displays new Activities, Companies, Contacts, Opportunities and Cases. Also provides audit reports by User.	
Divisions	Companies	Divisions within a Company. A Division can have its own address, profile and contact information. It is always linked to a Company.	
Employees	Companies	Number of Employees of a Company. Can be edited and entered by any User.	
Export	Administration	Ability to export the XRMS database.	
Files	Contacts Campaigns	Any file that is uploaded to XRMS, they can be word documents, spreadsheets, pdf files or any other file type.	
Former Names	Companies	A Companies former name(s).	
Import	Administration	Ability to import Company and Contact information into the XRMS database.	
Industry	Companies	Industry that a Company operates within (i.e Automotive, Healthcare, etc.). Industries can be added and modified by the Administrator.	
Legal Name	Companies	Companies legal name. Typically the same as Company name but can be different. Can be edited and entered by any User.	
Mail Merge	Companies Contacts	Ability to send emails to a Company or Contact. Boiler plate forms are provided or a Blank Template can be used. Mail Merge can be initiated from Company Details or from an	
Modified Date	Companies Contacts	Date a Company or Contact record was modified.	
News	Companies	Initiates Google news search of Company name.	
Open Activities	Activities	Activities that are not closed or completed.	
Open Cases	Cases	Cases that are not closed or completed.	
Open Items	Cases	Activities or Cases that still require Activities to complete and Close.	

Term	Association	Description
Opportunity	Companies	An Opportunity with a Company or Contact.
Override	Companies	Alternate Company address that is used as the primary address, over-
Address		riding the primary address.
Owner	User	Owner of the Company and Contact information. Usually the User who entered or provided the information.
PDA	Companies	Ability to synchronize Company and Contact information with XRMS.
Synchronization	Contacts	Currently not implemented.
Priority	Case	
Profile	Company	A Companies or Contacts profile.
	Contact	
Rating	Company	A Companies Rating - Fair, Good, Poor, N/A. Typically credit rating.
Reports	Reports	Reports generated by XRMS.
Revenue	Company	Companies annualized revenue.
Roles	User	Type of Users. Standard are Admin User and User where the Admin User can modify the Administration features of XRMS.
Tax ID	Company	Tax ID. Can be added or edited by any User.
Terms	Company	Payment Terms, net xx days. Edited from the Admin panel under Company.
User	User	A XRMS User that can add, modify, delete Companies, Contacts, Cases, Opportunities and Activities.
Vendor Key	Company	Unique field that can be added or modified by a User.

Appendixes

Appendix 1 - Country Code List

Country	Code	Country	Code	
	1	Cayman Islands	41	
Afghanistan	2	Central African Republic	42	
Albania	3	Chad	43	
Algeria	4	Chile	44	
American Samoa	5	China	45	
Andorra	6	Christmas Island	46	
Angola	7	Cocos (Keeling) Islands	47	
Anguilla	8	Colombia	48	
Antarctica	9	Comoros	49	
Antigua and Barbuda	10	Congo	50	
Argentina	11	Cook Islands	51	
Armenia	12	Costa Rica	52	
Aruba	13	Croatia	53	
Australia	14	Cuba	54	
Austria	15	Cyprus	55	
Azerbaijan	16	Czech Republic	56	
Bahamas	17	Democratic People's Republic of Korea	57	
Bahrain	18	Democratic Republic of the Congo	58	
Bangladesh	19	Denmark	59	
Barbados	20	Djibouti	60	
Belarus	21	Dominica	61	
Belgium	22	Dominican Republic	62	
Belize	23	Ecuador	63	
Benin	24	Egypt	64	
Bermuda	25	El Salvador	65	
Bhutan	26	Equatorial Guinea	66	
Bolivia	27	Eritrea	67	
Bosnia and Herzegovina	28	Estonia	68	
Botswana	29	Ethiopia	69	
Brazil	30	Faeroe Islands	70	
British Virgin Islands	31	Falkland Islands (Malvinas)	71	
Brunei Darussalam	32	Federated States of Micronesia	72	
Bulgaria	33	Fiji	73	
Burkina Faso	34	Finland	74	
Burundi	35	France	75	
Cote ?d?Ivoire	36	France, metropolitan	76	

Country	Code	Country	Code	
Cambodia	37	French Guiana	77	
Cameroon	38	French Polynesia	78	
Canada	39	Gabon	79	
Cape Verde	40	Gambia	80	
Georgia	81	Lesotho	118	
Germany	82	Liberia	119	
Ghana	83	Libyan Arab Jamahiriya	120	
Gibraltar	84	Liechtenstein	121	
Greece	85	Lithuania	122	
Greenland	86	Luxembourg	123	
Grenada	87	Liberia	119	
Guadeloupe	88	Libyan Arab Jamahiriya	120	
Guam	89	Liechtenstein	121	
Guatemala	90	Lithuania	122	
Guinea	91	Luxembourg	123	
Guinea-Bissau	92	Macau	124	
Guyana	93	Madagascar	125	
Haiti	94	Malawi	126	
Holy See	95	Malaysia	127	
Honduras	96	Maldives	128	
Hong Kong Special Administrative Region	n 97	Mali	129	
of China				
Hungary	98	Malta	130	
Iceland	99	Marshall Islands	131	
India	100	Martinique	132	
Indonesia	101	Mauritania	133	
Iran	102	Mauritius	134	
Iraq	103	Mayotte	135	
Ireland	104	Mexico	136	
Israel	105	Monaco	137	
Italy	106	Mongolia	138	
Jamaica	107	Montserrat	139	
Japan	108	Morocco	140	
Jordan	109	Mozambique	141	
Kazakhstan	110	Myanmar	142	
Kenya	111	Namibia	143	
Kiribati	112	Nauru	144	
Kuwait	113	Nepal	145	
Kyrgyzstan	114	Netherlands	146	

Country	Code	Country	Code	
Lao People's Democratic Republic	115	Netherlands Antilles	147	
Latvia	116	New Caledonia	148	
Lebanon	117	New Zealand	149	
Nicaragua	150	Slovakia	187	
Niger	151	Slovenia	188	
Nigeria	152	Solomon Islands	189	
Niue	153	Somalia	190	
Norfolk Island	154	South Africa	191	
Northern Mariana Islands	155	Spain	192	
Norway	156	Sri Lanka	193	
Oman	157	Sao Tome and Principe	194	
Pakistan	158	Sudan	195	
Palau	159	Suriname	196	
Panama	160	Swaziland	197	
Papua New Guinea	161	Sweden	198	
Paraguay	162	Switzerland	199	
Peru	163	Syrian Arab Republic	200	
Philippines	164	Taiwan	201	
Poland	165	Tajikistan	202	
Portugal	166	6 Thailand		
Puerto Rico	167	The Former Yugoslav Republic of	204	
		Macedonia		
Qatar	168	Тодо	205	
Republic of Korea	169	Tonga	206	
Republic of Moldova	170	Trinidad and Tobago	207	
Romania	171	Tunisia	208	
Russian Federation	172	Turkey	209	
Rwanda	173	Turkmenistan	210	
Reunion	174	Turks and Caicos Islands	211	
Saint Helena	175	Tuvalu	212	
Saint Kitts and Nevis	176	Uganda	213	
Saint Lucia	177	Ukraine	214	
Saint Pierre and Miquelon	178	United Arab Emirates	215	
Saint Vincent and the Grenadines	179	United Kingdom	216	
Samoa	180	United Republic of Tanzania	217	
San Marino	181	United States	218	
Saudi Arabia	182	United States Virgin Islands	219	
Senegal	183	Uruguay	220	

Country	Code		Country	Code
Seychelles	184	Uzbekistan		221
Sierra Leone	185	Vanuatu		222
Singapore	186	Venezuela		223
Viet Nam	224	Zambia		227
Yemen	225	Zimbabwe		228
Yugoslavia	226			

Appendix 2 - Default Import Format

Category	Default Import	Column #	Category	Default Import	Column #
//company info	company_name	1	//contact info	first_name	22
	legal_name	2		last_name	23
	division_name	3		email	24
	website	4		work_phone	25
	tax_id	5		home_phone	26
	extref1	6		fax	27
	extref2	7		division	28
	extref3	8		salutation	29
	company_custom1	9		date_of_birth	30
	company_custom2			summary	31
	company_custom3			title	32
	company_custom4			description	33
	employees	13		cell_phone	34
	revenue	14		aol	35
	credit_limit	15		yahoo	36
	terms	16		msn	37
	company_profile	17		interests	38
	company_code	18		contact_custom1	39
	phone	19		contact_custom2	40
	phone2	20		contact_custom3	41
		21		contact_custom4	42
				contact_profile	43
				gender	44
			//address info	address_name	45
				line1	46
				line2	47
				city	48
				state	49
				postal_code	50
				country	51
				address_body	52
				use_pretty_address	53
				_ •	

If you wish to use the default template, name the columns in your .csv file as the columns are named above. Don't worry if your file doesn't have all the columns, or if the columns are in a different order.

The import routine uses the column names to determine which fields to map things to, but it doesn't assume 'perfect data'. Company names are required. If you want to import an address, City is required. All other data will be handled safely if it is missing (we think).

You may also create your own templates, and submit them for inclusion with XRMS.

Appendix 3 - GNU Free Documentation License

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