XRMS User Manual

DRAFT 1

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v. 2.0

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Overview

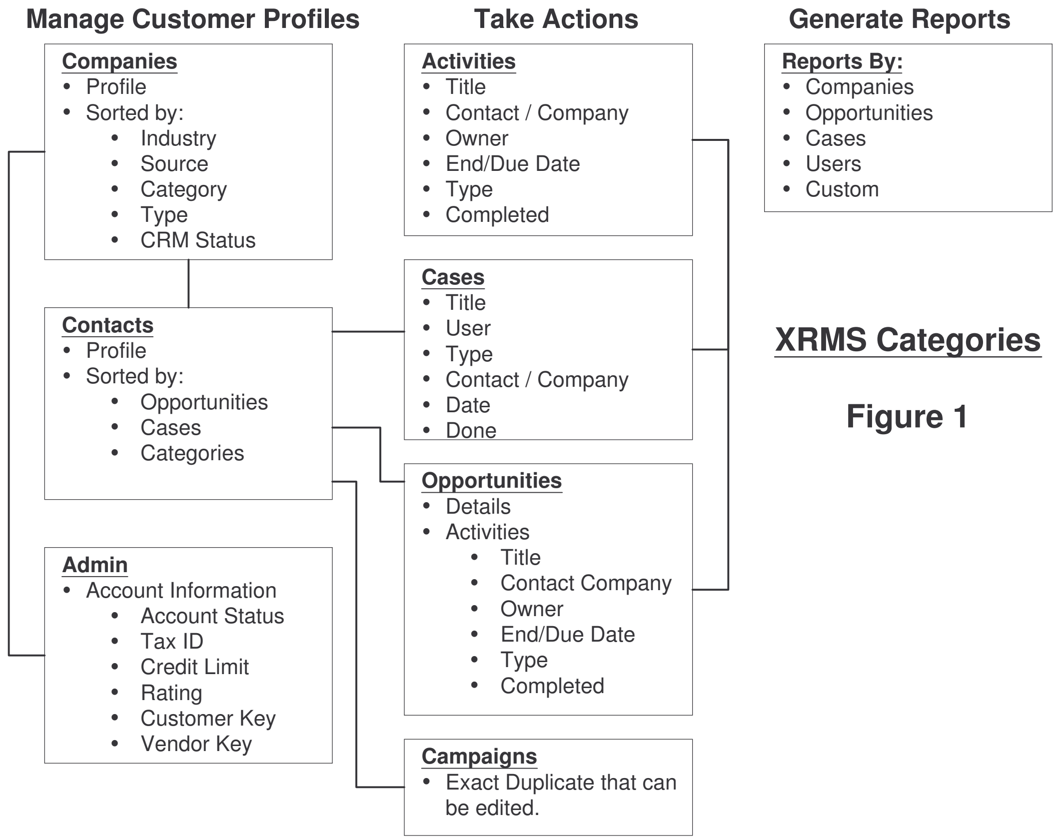
XRMS is a fully-integrated suite web-based Customer Relationship Management (CRM), Sales Force Automation (SFA), and business intelligence (BI) tools, allowing companies to integrate and manage their sales, service, and marketing data into a single information store.

It provides the ability to:

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

XRMS runs as a web application and requires PHP and MySQL. It runs in either a Windows or Linux environment.

Description of Components



XRMS Categories

Figure 1

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

The Companies profile is the main contact management section of XRMS for all Company, Contact and Admin (Account) information. Companies can be added and edited.

Contacts can only be added to a Company profile. Contacts must be related to a Company.

The Admin component provides the ability enter a Companies account information which includes Account Status, Tax ID, Credit Limit, Rating, Customer Key, Vendor Key.

Take Actions

The types of actions (activities) that XRMS provides are:

1. Activities - which can be any Activity that a User can initiate. Activities do not have to be related to a Company or Contact.

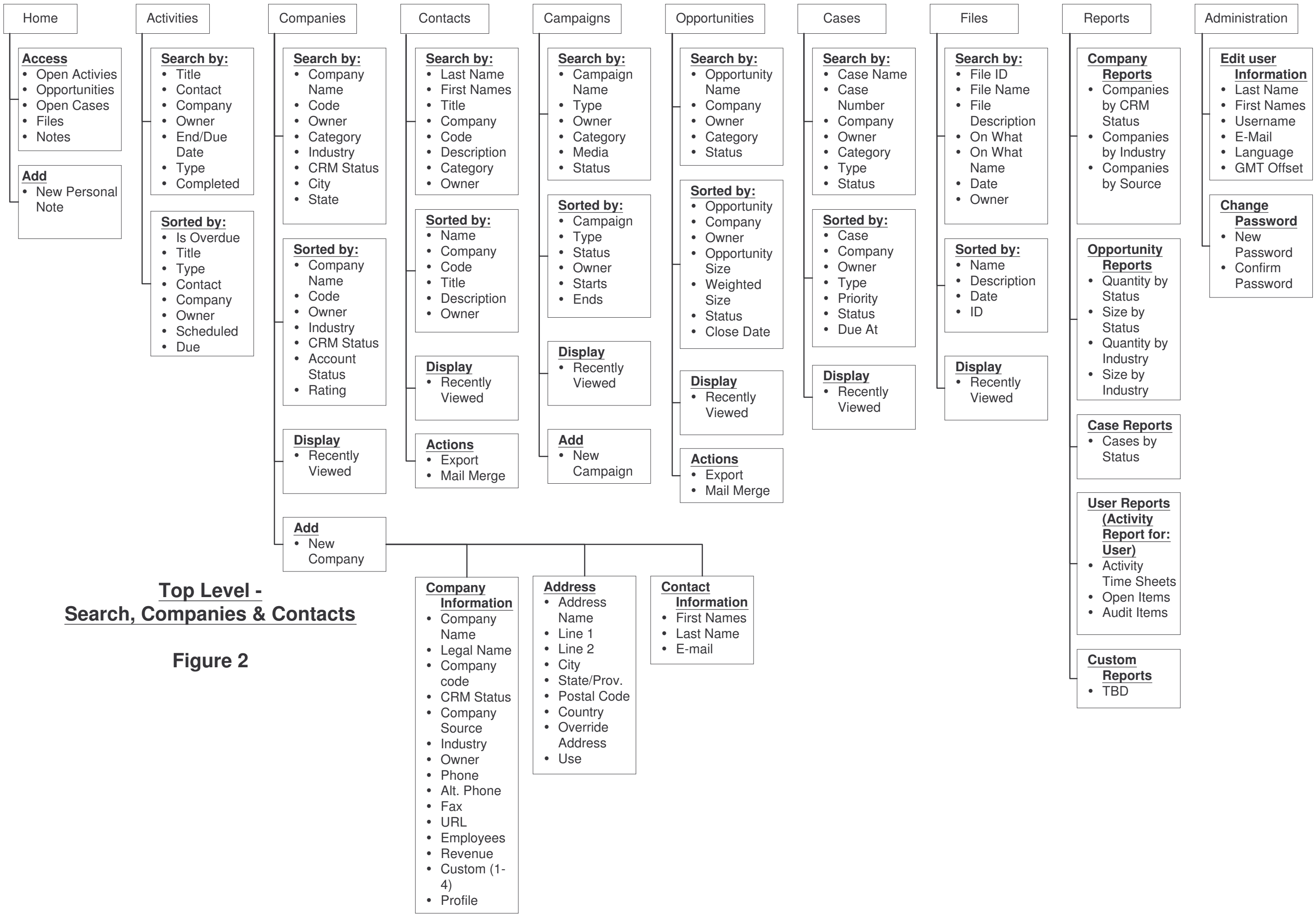
2. Cases - which are typically Company/Contact initiated, like service calls. Cases must be associated with a Company and a Contact within a Company. If no Contact is selected the Company default Contact is assumed. Activities can be initiated related to Cases.
3. Opportunities - which are typically 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.
4. Campaigns - 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.

Generate Reports

XRMS provides to generate reports by:

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

Top Level Windows



Top Level - Search, Companies & Contacts

Figure 2

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's 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:

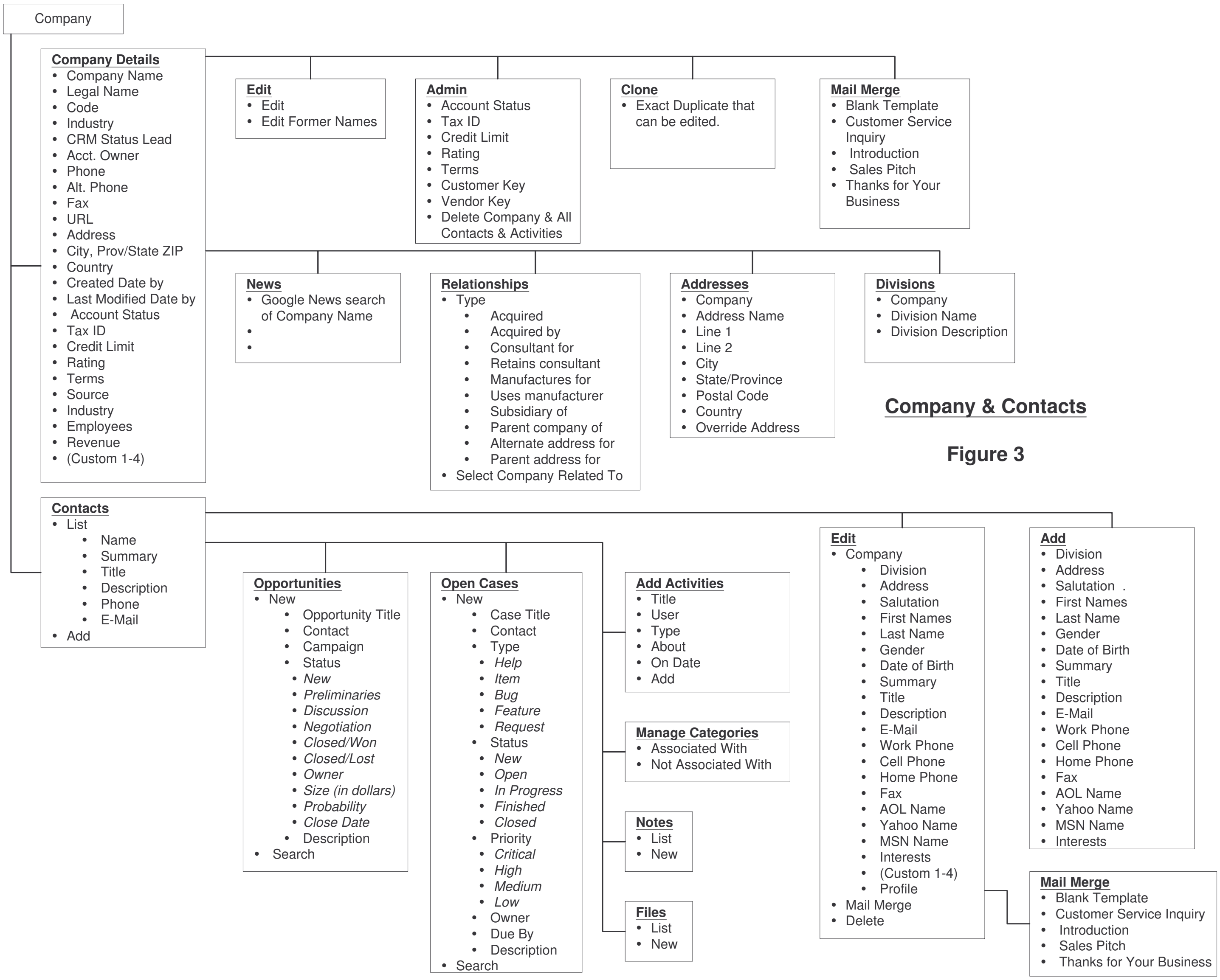
- Search by Opportunity Name, Company, Owner, Category, Status.
- Export the Opportunities into an spreadsheet.
- Create a mail merge from a template. The templates available are a Blank Template, Customer Service Inquiry, Introduction, Sales Pitch or Thanks for Your Business.

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



Company & Contacts

Figure 3

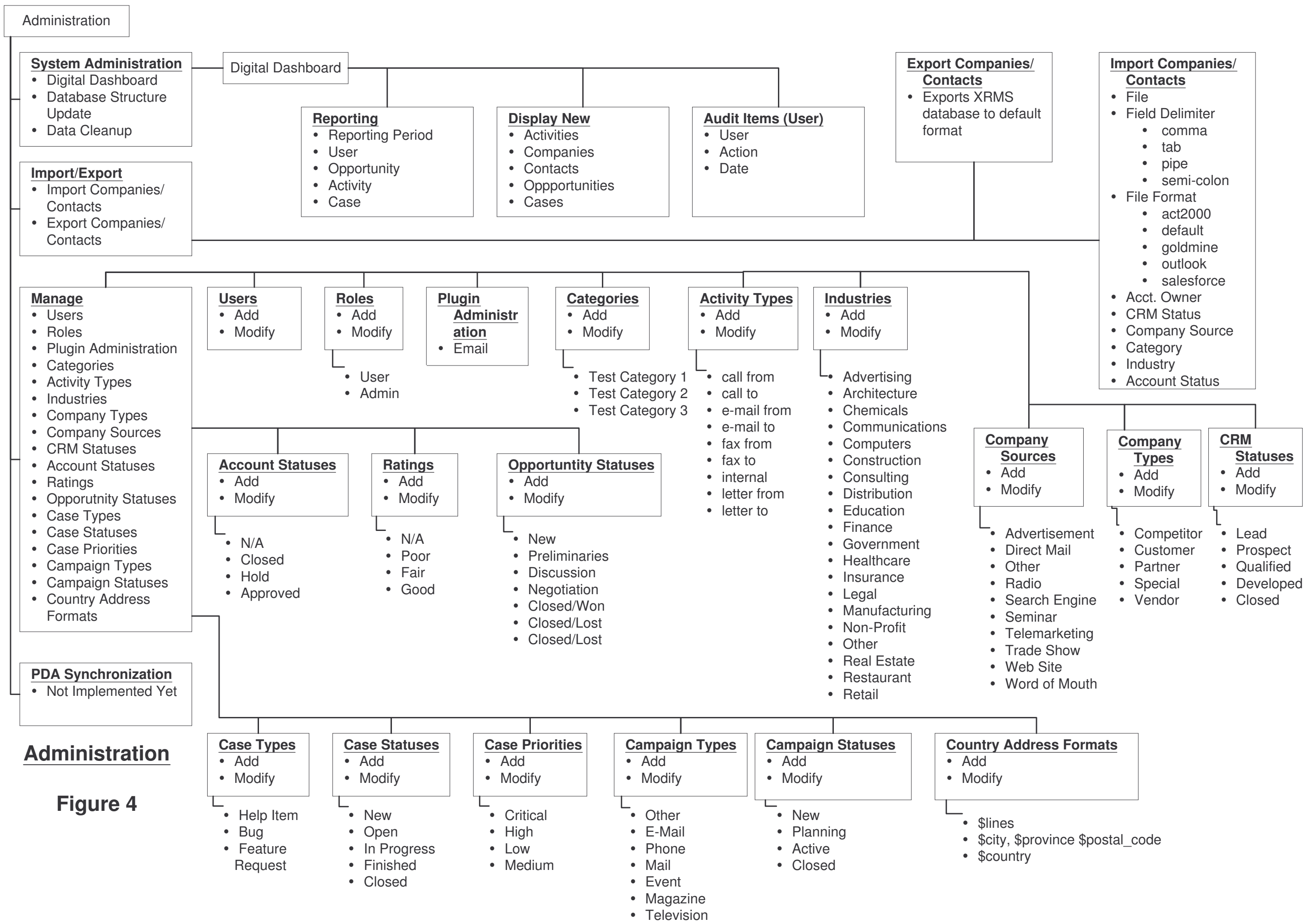
All data management of the Company, Contacts, Opportunities, Cases, Activities, Categories, Notes and Files can be accessed from the Company & Contacts section. This includes editing, deleting, adding or modifying information.

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



Administration

Figure 4

System Administration

System Administration consists of:

- Digital Dashboard:
  - Provides various reports by User, Opportunity, Activity and Case.
  - 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 supports supported are act2000, goldmine, salesforce, outlook or the default format of XRMS. The default format is defined in the Appendix 2 - Default Import Formats.

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.

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 Types can be Help Item, Feature, Request. Case Types can be added and modified by the Administrator. Activities can be related to a specific Case.
Case Priorities	Cases	Level of urgency - Critical, High, Low, Medium. Case Priorities be added and modified by the Administrator.
Case Status	Cases	New, Open, In Progress, Finished, Closed. Case Status be added and

Term	Association	Description
		modified by the Administrator.
Category	Companies Contacts	A custom field that can be related to Contacts, Companies, Campaigns 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.
Custom	Reports	
Custom Reports	Reports	
Customer Key	Companies	Unique number that is related to a Company. Can be modified or entered by any User
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	Ability to send emails to a Company or Contact. Boiler plate forms are

Term	Association	Description
	Contacts	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		
Opportunity		An Opportunity with a Company or Contact. Opportunity t
Override Address	Companies	Alternate Company address that is used as the primary address, over-riding the primary address.
Owner	User	Owner of the Company and Contact information. Usually the User who entered or provided the information.
PDA Synchronization	Companies Contacts	Ability to synchronize Company and Contact information with XRMS. Currently not implemented.
Priority	Case	
Profile	Company Contact	A Companies or Contacts profile.
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

Appendix 2 - Default Import Formats